EPIC Portfolio Peer Review Workshop

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Agenda

- Welcome & Introductions
- What makes a good presentation - key principles
- Example portfolio
- Peer review

Welcome!

Goals for this session:

- Get some high-level tips and guidance for conducting good portfolio reviews and interviews
- Get real-time feedback and reflections from your peers on your portfolio
- See other portfolios and provide positive feedback to your peers on the effectiveness of their portfolio content and presentations

Let us introduce ourselves

Alexandra Mack

- Director of Research at Ad Hoc, a digital services contractor for government agencies
- Previously established frameworks for research and analysis, and developed a program of work practice research at Pitney Bowes
- PhD Archaeology

Marc Lafleur

- Leads Human-centered design at ZS, a global management consulting firm focused on healthcare
- Previously built and led strategic design practices at Cognizant, Gemic and Idea Couture
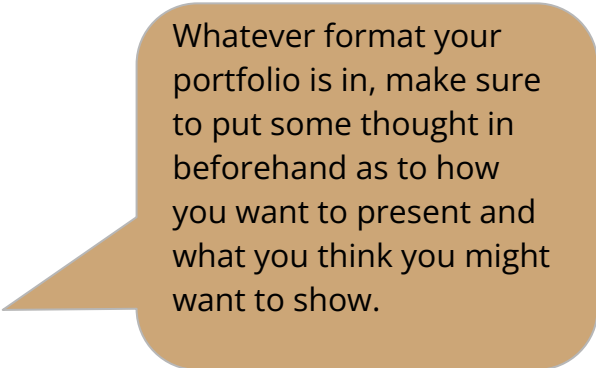- PhD Medical Anthropology

What format should my portfolio be in?

It depends (doesn't it always in research)?

Many people maintain a website, or keep their examples in any of a variety of document shareable formats. A potential employer may ask you for a live presentation.

Today we are going to focus on the content, and principles of **how** you relay that information--and recommend that you be prepared to translate your story to different formats, as needed.

Whatever format your portfolio is in, make sure to put some thought in beforehand as to how you want to present and what you think you might want to show.

Key Principles Portfolio Sharing

Connect your portfolio examples to actions and decisions

- We often see candidates highlight the incredible research they did, the insights they created and then just leave the story there as if the insights had value in and of themselves
- While hiring teams are interested in methodologies, research skill sets and approaches, they are most interested in how you leverage them to create impact for your client (Internal or external)
- Make sure you are always **connecting** what you did to the outcomes it created or enabled

Explain your key insight and how it led to an outcome or decision

- In any case or challenge you have in your portfolio there were probably a myriad of interesting insights that led to the solution or outcome
- We often see candidates, in their enthusiasm, taking us through all the insights they helped identify
- A more strategic approach is to identify one key insight that you can explain in depth and connect to the outcomes you have identified
- That insight should ideally one that reframed or shifted ingoing perceptions and led to a new way of thinking about the problem and thus the solution

Articulate the outcomes

- Building on the last point, too many candidates fail to articulate the outcomes that their project drove. As researchers we sometimes feel disconnected from the strategic outcomes, preferring to lean into the research as an end unto itself. This is a mistake - make sure to always complete your story or connect your portfolio examples to the **outcomes** the project drove.

Demonstrate you can match appropriate methods to the research question

- You will often be asked in interviews to do a case study as part of the process. Be selective and thoughtful about what methods you highlight as those you might employ. Interviewers are not looking for a demonstration of all the methodologies you know, rather they are looking for the ability to **match** the problem to the right methodology to drive the right outcome

Tell a coherent story

- Whether it is nerves or just a desire to be comprehensive, too often we see candidates share their portfolios or skillsets in ways that are hard to follow. Always make sure that you are focusing on telling a **coherent** story about yourself and your work that emphasizes the value you bring to any engagement. In this sense, often less is more. [If the interviewer(s) are interested in learning more - they will ask!]

Demonstrate your individual contributions

- Sometimes we see candidates focus on the activities of team that they were part of when presenting their portfolios. This is often driven from a sense of humility and a desire to showcase how you are a team player. However, too often this humility is undermining in the sense that it makes it impossible to see the contributions made by you. It is good to demonstrate collaboration, but emphasize what your contributions were to the overall outcomes rather than speaking in overly-general terms about a team.

Demonstrate how you work with others

- Saying what we just said about emphasizing individual impact, we also anticipate that you will get questions about how you collaborate and work as part of a team. The last point asked that you emphasize your individual impact **within a team** don't forget this last part - it's a fine balance to make but worth emphasizing both your individual contributions and how you work with others. Most importantly, go beyond basic collaboration and show how your efforts empowered and amplified the efforts of others.

Make portfolio legible to non-researchers

- While most of us are researchers who just love to talk about research and insights, it is likely that the teams who will be interviewing you and who you will be working with will be composed of more than just researchers
- Demonstrate your awareness and sensitivity to the importance of cross-functional teams and collaboration by striving to make your portfolio as accessible to all as possible
- This means ensuring the language you use is stripped of excessive jargon and that, as we have already stated, you have clearly demonstrated how your research drove outcomes that were relevant for the business or the organization as a whole

Peer Review - 55 minutes

Instructions:

- We will send you to break-out groups of 4-5 people (~10-12 mins per person)
- Take turns presenting your portfolios to your peers and solicit feedback from them
  - ask for feedback on specific aspects or on the general look, feel and flow of the presentation

Checklist for future portfolio presentations

- ❏ Connects research to actions or decisions
- ❏ Identify the key insight
- ❏ Articulates outcomes
- ❏ Matches appropriate methods to the research questions
- ❏ Tells a coherent story
- ❏ Demonstrates the individual's contributions
- ❏ Demonstrates how the individual works with others
- ❏ Makes material accessible to non-experts
- ❏ Shows work that is relevant to the job applied for

Thank you and good luck!