A Guide to Making an Effective Playbook:

How to Document and Share Solutions Within the Development Sector

By Gargi Anand, Smita Kumar

WELL LABS

AXIS BANK FOUNDATION

Authors
Gargi Anand is a qualitative research manager with the Green Rural Economy initiative and the Platforms and Partnerships programme.
Smita Kumar was the product manager of the Green Rural Economy initiative.

Editorial Review Ananya Revanna
Report Design Ramya Krishnan
Photo Credit WELL Labs

Acknowledgements We would like to thank the Axis Bank Foundation for supporting the Green Rural Economy (GRE) initiative. We are grateful to our colleagues at WELL Labs—Veena Srinivasan, Vivek Srinivasan, Shivangi Behera, and Aparna Nambiar—for their support and contributions. We also thank our external collaborators, Mohit Rao and Lakshmi Pranuti Choppakatla.

About WELL Labs WELL Labs is a water systems transformation centre working across India through research, partnerships, and collective action. It is part of the Institute for Financial Management and Research (IFMR) Society.

About Green Rural Economy (GRE) The GRE platform is the centrepiece of the Platforms and Partnerships programme at WELL Labs. It connects changemakers with service providers to accelerate the discovery and implementation of sustainable solutions.

Table of Contents

Introduction

What is a Playbook?

Our world faces grave threats, such as climate change, resource depletion, pollution, and water and food insecurity. However, the manifestation of these problems, their causes, and solutions are often unique and local. India has thousands of civil society organisations (CSOs) working on numerous problems and they have, over decades, developed solutions that are deeply contextual.

The challenge lies in how these **solutions** are offered – as complete, end-to-end packages. However, different communities have different needs so a one-size-fits-all approach limits the transfer of knowledge and restricts communities to the solutions promoted by the CSO, rather than what might be most relevant to them.

This is where the playbooks come in – they **document, unbundle,** and **disseminate knowledge** in a way that makes it **transferable, adaptable,** and **scalable** across regions.

What is a solution?

A solution combines scientific knowledge, technical expertise, and community organisation to address problems at scale while remaining responsive to local challenges. Development actors across India have generated a wealth of such knowledge, particularly in land, water, and livelihood domains. Packaging this knowledge as solutions makes it easier to grasp, replicate, and adapt.

By unbundling these solutions and clearly documenting prerequisites (such as climatic conditions, resources, or social context), playbooks make them transferable across regions. They accelerate knowledge diffusion, address last-mile challenges, and give greater visibility to the solution providers.

Why We Created This Toolkit

In developing playbooks ourselves, we sought to document a participatory methodology that CSOs and other organisations can independently adopt – with or without our support. Unlike many pilot projects that risk becoming overly top-down, this approach emphasises collaboration:

- Building relationships with organisations
- Facilitating conversations and workshops
- Working with design consultants and translators
- Scoping topics with experts
- Recording and synthesising knowledge systematically

While this toolkit outlines a tested framework, it is not prescriptive. Users are encouraged to experiment with new tools, methods, and adaptations to strengthen the process.

Who Is This Toolkit For?

This toolkit is intended for:

- CSOs seeking to document and share their solutions
- Practitioners and trainers wanting to codify their work
- Experts looking for structured methods to disseminate knowledge

Ultimately, the success of playbooks depends on the commitment of creators to invest time in ensuring accuracy, usability, and visual clarity. To support this, we also highlight publicly available platforms and tools that can enhance design and accessibility.

This is the first edition of the toolkit. As we gain more insights through partnerships with diverse organisations, we will expand and refine its content. Our aim is to build the capacities of CSOs across India to present their knowledge and expertise in ways that are clear, adaptable, and impactful.

By approaching knowledge creation from a solution-oriented perspective, we hope to foster a culture of documentation, sharing, and adoption – contributing to more sustainable livelihoods and resilient communities.

Overview: Playbook Making Process

Making a playbook involves four crucial steps:

STEP 1: Discover

The first step involves creating avenues for interaction with the playbook makers – scoping out the users, prospects, and opportunities attached to the playbooks.

STEP 2: Download

The second step involves gathering insights from experts and validating them through fieldwork. This connects the playbook maker with the solution providers and the users who are impacted by the solutions.

STEP 3: Document & Design

The third step involves compiling, structuring, and designing the playbook to enhance user comprehension. This is when you get the playbooks peer reviewed by relevant organisations and incorporate feedback from partner organisations.

STEP 4: Disseminate

The fourth step assesses a playbook's usefulness and effectiveness through user testing, and suggests outreach strategies.

PART 1

Discover

How to document and share solutions within the development sector

The first stage of the playbook-making process is designed to clarify the idea and purpose of a playbook and ensure its alignment with the organisation's goals. While organisations may be engaged in numerous initiatives across themes, this stage focuses on identifying the nature of the solution and connecting it to the organisation's vision. This step also lays the foundation for creating the playbook.

Key questions to explore

- How will a playbook help us at this point?
- Who will make the playbook?
- Who can be oriented to create effective playbooks?

At the Discover stage, we scope out the people, prospects, and opportunities attached to the playbooks.

Initiating Engagement

- **Introductory email:** Begin with an email introducing the playbook-making process, outlining objectives, and sharing information about upcoming workshops. This can also be used to schedule a kickoff call.

Here's a sample template for an introductory email.

- **Kickoff call:** This serves as an ice-breaker and helps build rapport with potential playbook makers.

  During the call, make notes on:

  - Knowledge resources available in the organisation's thematic areas.
  - Existing knowledge creation processes.
  - A designated point of contact (PoC) for the engagement.
  - Priority thematic areas for playbook development (at least two), such as agriculture, backyard poultry, or handicrafts/handloom. Relevant experts from these areas should also be identified for the upcoming workshop.
  - Date and time for the preliminary workshop.

Preliminary Workshop

The preliminary workshop helps outline the primary thematic areas where playbooks will be developed. It uses a systematic process to map current knowledge creation activities, identify future aspirations, and define:

- Prospective playbook ideas
- Target users
- Suitable playbook formats

👉 **Here is a suggestive workshop module for reference**. Tools like Miro can be used for the ideation process, especially in this online process.

Building a Playbook Development Team

A playbook cannot be made in isolation – putting together a team is an essential part of the playbook-making process. Some of the **fundamental roles** are:

Facilitator: A person who leads and corroborates the knowledge, plans the activities, and leads the 'Discover, Download, Design and Disseminate' process.

Knowledge experts: People who have expertise about a solution, especially field experience. This may include:

- **Subject matter specialists:** Programme managers and associates who provide and verify the technical correctness of a solution.
- **Field implementors:** Field staff, trainers, experienced community resource persons, and volunteers.
- **External consultants:** Those who are engaged with and updated about a solution, and can provide peer review.

Communication experts: They can take up the responsibility of writing, recording and designing the playbook content.

PART 2

Download

Extracting knowledge from experts and field sites to understand the solution

At this point, we have developed a good understanding of what playbooks are and how they can serve as effective tools in our efforts to create sustainable livelihoods. We have also identified the individuals who will lead this initiative, communicated their roles and responsibilities, and ensured they are aware of their tasks. Additionally, we can now visualise the thematic areas relevant to the development of the playbooks, as well as the formats that will be most effective for the users.

Now, it is time to organise and process our thoughts clearly. We need to leverage all this information to extract insights from experts systematically, involving relevant sources of knowledge. This process will also include a field component, which will help validate the discussions held while gathering insights from the experts.

Field-Based Workshop

The process begins with a field-based workshop that brings together key stakeholders to generate practical insights and validate the solution. Participants include:

- **Implementers of the solution:** To share firsthand field experience and practical insights.
- **Subject matter experts:** To contribute technical expertise for designing the project.
- **Practitioners:** To combine technical knowledge with field realities and design interventions around the solution.

☞ **Here is a suggestive workshop module for your reference.**

Qualifying the Work as a Solution

This step complements the findings from the workshop and can also be used during the workshop to capture key details. Use the following guiding questions for each playbook topic:

- Who will this solution help and how?
- What problem is this solution solving?
- How does the solution make the user's work or life easier?
- What makes the user eligible to adopt this solution?
- For whom is this playbook being created?

Once answered, the responses should help:

- Identify the **primary and secondary users** of the playbook.
- Determine the most **suitable format** for the playbook, based on timelines and resources.
- **Finalise a name** that conveys the solution clearly to its intended users.

Field Visits and Interviews With Experts

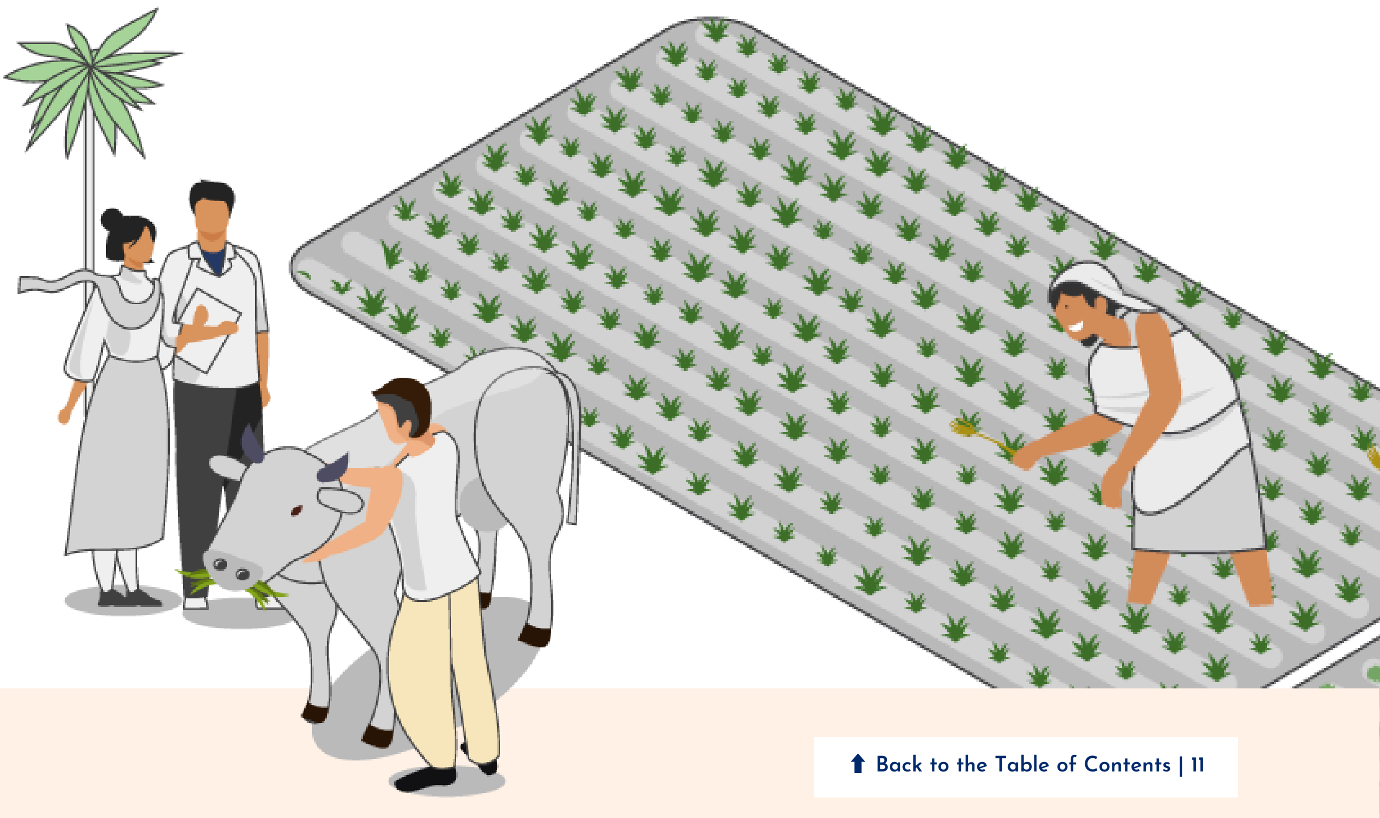
Field visits should cover three key aspects:

Visit the solution site	Engage with implementers	Meet the users
Observe the implementation firsthand.	Farmers, artisans, or community groups driving the solution.	Farmers, community members, artisans, field staff, or CRPs who benefit from it.

Things to keep in mind:

Scheduling visits

- Ensure the availability of both solution providers and users.
- Allow sufficient time for interaction and in-depth interviews with stakeholders.
- Include time for direct observation of the solution, as this often reveals critical insights.



Etiquette and attitude

- Look presentable and relatable to the locals.
- Arrive with a blank slate and a learning mindset.
- Observe the region carefully and create a comfortable environment for both yourself and the community.
- Be a companion and observer, not an educator.
- Encourage 'show and tell', as demonstrations often reveal nuances.
- Note these observations and integrate them into the field plan.
- Balance prior desk research with openness – avoid overriding local expertise.
- Remember: ground realities may differ from what you know.
- Always invite comments and inputs from all participants.
- Knowing the local language helps but is not compulsory.

Building a rapport

- Break the ice during workshops or conversations; show genuine interest in people's perspectives.
- Be curious about the theme – ask open-ended, curiosity-led questions rather than leading ones. Sample questions include:
  - How did this solution originate?
  - Why is it important in this geography, community, or organisation?
  - What need does it fulfill?
  - How is it introduced to the community?
  - What responses do you usually get?
- Give experts and users space to tell their full story.
- Keep your tone inquisitive, not interrogative.

Recording and documentation

- Use recording devices or apps (e.g., Otter.ai, Taqtic, Read.AI) for note-taking and transcription.
- This allows you to stay present, attentive, and participative during the conversation.
- Capture observations that can later feed into playbooks.

Follow-up After the Field Visit

Document questions

- List all possible questions related to the solution, drawing from workshop discussions.
- Break the solution into steps and note down questions for each aspect.

Record answers

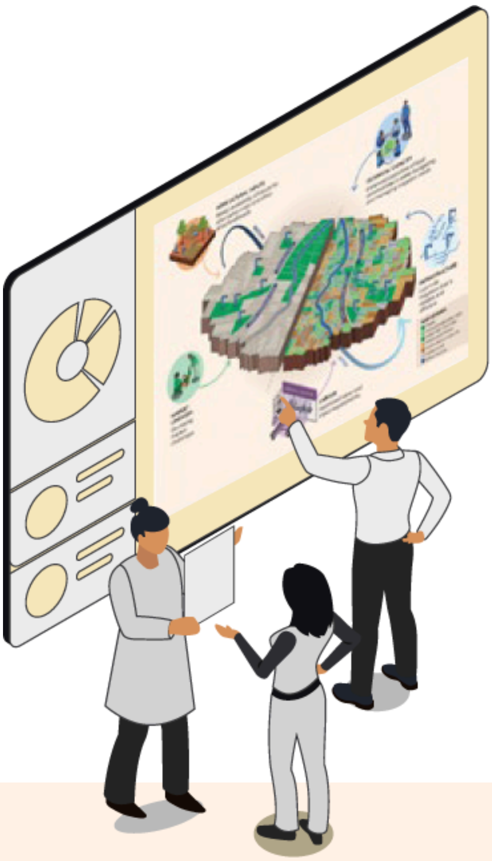
- Jot down all available answers gathered during the visit.
- Highlight gaps – answers that are missing or unclear.

Plan next steps

- Organise a second field visit if needed.
- Brainstorm with team members.
- Refer to existing reports, case studies, or other resources.

Set timelines

Assign deadlines for gathering the missing information to keep the process on track.



PART 3

Document, Design & Review

Systematically organising, designing and reviewing the information gathered from the field is essential. Here are a few steps to each process.

1. Structuring a Playbook

The overall structure of a playbook must be clearly envisioned. A suggested flow for guiding the playbook is provided below. It is important to maintain a clear mental image of the playbook during this step, as this ensures all collected information is included and considered from the user's perspective.

Worksheet

1	**Title** *(keep it simple.)*
2	**What pain point is this playbook addressing?**
3	**Who can use the playbook?**
4	**What are the conditions under which the playbook can be used?** *(geographical region, adoption conditions, and minimum requirements)*
5	**Any background information or key definitions related to the solution that can help the user better understand the playbook.**
6	**What are the stakeholders to this process?**
7	**What are the benefits to the stakeholders?**
8	**Who created this solution and playbook?**
9	**Where and when has this been tried successfully?**
10	**What are the resources or components required to execute this solution?**
11	**What steps does this solution involve?** *(This can range from 1-10 steps)*
12	**What are the stakeholders to this process?**
13	**What caveats/disclaimers do we need to keep in mind?**
14	**Links to resources about the solution.**
15	**What other prerequisites are needed to implement this playbook? Specify the internal and external resources (both human and financial) required for successful implementation.**
16	**Are there companies that provide similar services?**
17	**Name and contact information of the experts.**
18	**Other suggestions.**

2. Designing and Developing a Playbook

The overall structure of a playbook must be clearly envisioned. A suggested flow for guiding the playbook is provided below. It is important to maintain a clear mental image of the playbook during this step, as this ensures all collected information is included and considered from the user's perspective.

Finding and Onboarding the Right Designer

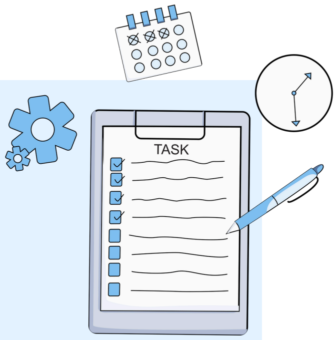
How to identify a designer

- Share a clear and attractive JD (see sample for reference).
- Specify scope of work, including:
  - Field travel (if required)
  - Number of deliverables and timelines
  - The team the designer will liaise with
- Give a sense of the opportunity (e.g., possibility of a long-term engagement) to help with price negotiation.
- Share references or examples of desired outputs.
- Ask candidates to submit portfolios along with their CVs.
- Use a tracker to screen and compare prospective designers.

Onboarding process

- Orient the designer to the project and its goals.
- Provide a page-wise breakup of content, user personas, and key messages to highlight.
- Clarify timelines using a shared tracker to ensure accountability.

Working with the Designer



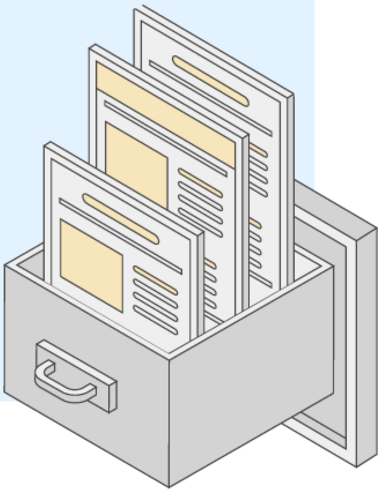
Ways of working

- **Communication:** Use one agreed channel (e.g., WhatsApp group or Google Workspace).
- **Feedback timelines:** Consolidate and share feedback within a fixed period (e.g., within one week of receiving drafts).
- **Co-creation:** Treat the process as a team effort. Involve the designer in brainstorming formats that suit the content.
- **Conflict resolution:** Hold quick check-in calls weekly/bi-weekly to surface challenges (delays, scope changes, etc.).

Organising the Content

Use a dedicated Google Drive/OneDrive folder for each playbook, with sub-folders for:

- Worksheets and notes from the field
- Draft documents
- Photos and videos from the field
- Recordings/transcriptions
- Existing knowledge resources
- Storyboards/first drafts (designer)
- Revised drafts with comments
- Final content

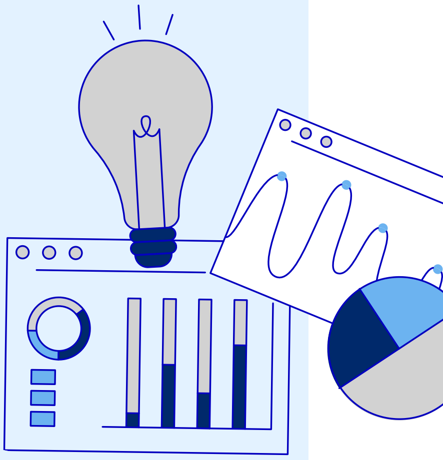


Making the Playbook Visually Appealing

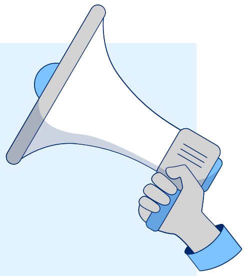
The design must align with the needs of diverse users – from community resource persons and Panchayat representatives to district officials and early-career researchers.

Tips for Designing for Rural Audiences

- **Colour coding:** Use green for positive actions (yes/right) and red for negative actions (no/wrong, prevention/cure).
- **Character representation:** Include relatable characters (e.g., women farmers, local attire, jhola).
- **Visual aids:** Use arrows, markers, and icons to link text with materials and resources – helpful for low-literacy audiences.
- **Knowledge tools:** Incorporate maps, tables, calendars, schedules, and process flows.
- **Comic style:** Use comic formats for behavior change communication or personal-impact concepts.



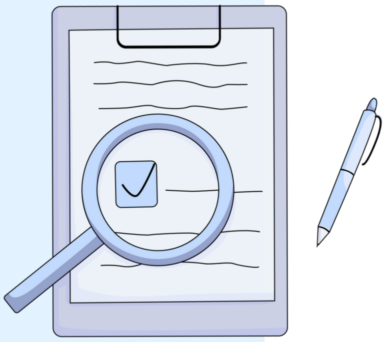
Giving the Playbook a Voice: Language



- Use a confident, positive, and practical tone that is easy to follow.
- Avoid overly academic language – focus on field usability.
- Where relevant, include colloquial terms that make content relatable.
- Translate into local languages to maximise accessibility.

Ensuring Maximum Usability

- Keep sections concise and avoid text-heavy layouts.
- Use visuals and summaries wherever possible.
- The first page should include:
  - Credit attribution to contributing organisations and experts.
  - Contexts where the playbook is applicable (geography, soil type, irrigation, cultural setting, etc.).
  - A brief definition or overview of the solution/process.



3. Review and Validation: Cross-checking the Information

This step ensures that the content of the playbook is factually accurate and technically sound. Since playbooks are open-source knowledge products that are publicly available, accuracy and credibility are essential. It is best to conduct this review after the playbook has been designed, as reviewing the final format provides a more comprehensive perspective on the product as a whole.

Steps in the Review Process

Revisit the Source of Knowledge

- Refresh your memory: How was this solution first learned or observed?
- Conduct secondary research to cross-check the solution against existing literature and resources.

Internal Review

- Share the draft with your team members.
- Communicate the importance of the playbook and its intended use before seeking their inputs.
- Encourage feedback through PDF comments and compile all suggestions in a spreadsheet for easy reference and tracking.
- Use this feedback to clarify or validate specific points in discussion with the team.

Peer Review

- Once the parent organisation completes the final round of edits,
- initiate a peer review process.
- Identify external peers or organisations working in the same thematic area to review the playbook.
- Their role is to check for scientific and technical accuracy and recommend revisions where necessary.
- Note: Case studies and improvisations explicitly marked as rules of thumb or anecdotal evidence by the parent organisation do not require peer validation.

Feedback Consolidation

- Seek honest, constructive feedback from both internal and external reviewers.
- Document all comments, decisions, and clarifications to maintain a record
- for future updates of the playbook.

4. User Testing a Playbook

User testing helps determine whether the playbook is useful, practical, and valuable to its intended users in their real-world settings. Collecting user feedback provides genuine insights that strengthen the playbook's relevance and usability.

We focus on four aspects during testing:

Content

Is the information accurate, relevant, and applicable?

Design

Are visuals clear, engaging, and user-friendly?

Language

Is the tone simple, positive, and easy to understand?

Usability

Does the playbook add value to users' work in the field?

User testing must be conducted in all languages into which the playbook has been translated.

Phases of User Testing

Pre-Testing

- **Briefing the team:** Orient the team using a structured framework
  sample user testing framework
- **Inclusive process:** Emphasise the importance of user participation and make everyone feel involved.
- **Planning and scheduling:** Fix timelines, field visits, and strict deadlines for integrating last-minute changes.
- **Distributing drafts:** Provide users with playbook drafts for at least 15 days.
- **Monitoring and Support:**
- Follow up regularly to check progress.
- Help users understand the playbook's significance.
- Share a questionnaire to collect structured, quantitative feedback
  see sample in Hindi

Testing

- **Establish clear roles and responsibilities:**
  - **Parent organisation:** Validates accuracy of content and ensures fidelity to the original solution.
  - **Playbook development organisation:** Structures content, integrates feedback, manages stakeholder engagement.
  - **Funding agency:** Supports logistics, feedback collection, and impact assessment.
  - **End users (CRPs):** Test the playbook in real scenarios, provide usability feedback, and suggest improvements.
  - **Designers:** Align illustrations with content and revise as needed.
  - **Translators:** Ensure clarity, accuracy, and cultural resonance in translated versions.

- **Pilot testing with end users (CRPs)**
  - Select CRPs to test the playbook in the field.
  - Gather feedback on clarity, usability, and practicality.
  - Use methods such as focused group discussions and Navigation (ShowMe) exercises to observe how users interact with the playbook.
  - Schedule debrief sessions with experts and the design team to refine drafts.

- **Feedback consolidation and iteration**
  - Hold structured review meetings with stakeholders.
  - Prioritise feedback (e.g., factual accuracy over minor design preferences).
  - Revise content, visuals, or translations as necessary.

- **Communication channels**
  - Use collaborative tools, like Google Docs, Notion, WhatsApp and Slack, for smooth coordination.

Post-Testing

- **Integration of feedback**
  - Compile all comments for design and translation teams.
  - Cross-check revisions, proofread, and continue peer review with other practitioners.

- **Cross-verification and final review**
  - Parent organisation, translators, and designers jointly review the final draft.
  - Ensure scientific accuracy, cultural relevance, and language clarity.
  - If major revisions are made, conduct a second round of user testing with CRPs.

- **Documentation of learnings**
  - Create a feedback repository that logs issues and their solutions.
  - Develop a standardised checklist to guide future playbook development and testing.

PART 4

Dissemination

Sharing the playbooks with wider audiences

GRE Clinics

At Green Rural Economy (GRE), we organise **GRE Clinics** – strategically designed webinars that serve not only as knowledge exchange forums but also as a key channel to promote our curated playbooks.

During the Clinics, **sector experts** engage with **knowledge seekers** – civil society organisations, grassroots leaders, and rural entrepreneurs – who bring practical challenges from the field. To ensure responses are both relevant and actionable, experts are encouraged to reference the playbooks while addressing queries. This reinforces the playbooks as trusted repositories of knowledge and sparks participants' curiosity to explore them further. By embedding the playbooks into live, context-specific discussions, they are transformed from static resources into dynamic problem-solving tools.

The Clinics are recorded and edited into short, **digestible videos** that highlight expert insights and point back to the playbooks. These clips are shared through GRE's website and social media platforms to broaden their reach. In addition, participants receive **follow-up communication** with direct links to the most relevant playbooks for their needs.

This multi-pronged strategy – expert reinforcement during sessions, wider dissemination through digital media, and targeted follow-up – ensures that the playbooks are not only accessed but actively used as reference guides by a growing network of changemakers across rural India. Through this model, we aim to embed the playbooks into the everyday practices of rural development actors.

Resources

Resources

- Photography and videography: A checklist for before going on the field
- Photography and videography: Tips on how to visualise frames
- Zoom: Things to remember when recording
- Loom: How to record video trainings
- Writing and disseminating grey literature
- Canva: A beginner's guide
- Canva: Promote with print
- Canva: Designing for print
- Canva: Icon library and templates
- Miro: How to use it

Glossary

Knowledge Resources	Any documentation of the work that an organisation is doing that has been conceptualised and prepared by them for either external or internal use.
Solution	A process, method, model, or set of practices that has been tried and tested to help solve a pertinent shared problem in the realm of sustainability and development through active collaboration.
Solutionising	The process of creating a solution using knowledge targeted to solve specific problems is easier to grasp when it is in the form of a solution.
Experts	A person with expertise in the subject matter that a playbook deals with.
Trainers	Individuals who are involved in the capacity-building and learning aspects associated with the solutions. This may include both independent trainers and those working and affiliated with organisations.

greenrural.livelihoods@ifmr.ac.in

gre.welllabs.org

@WELLLabs_org

Water, Environment, Land and Livelihoods (WELL) Labs

OPERATING OFFICE:

WELL Labs
No. 9, First floor, Krishna Road,
Basavanagudi, Bengaluru - 560004,
Karnataka, India

REGISTERED OFFICE:

Institute for Financial Management and Research (IFMR)
No. 196, TT Krishnamachari Rd, Alwarpet,
Chennai - 600018, Tamil Nadu, India

WELL LABS

AXIS BANK FOUNDATION