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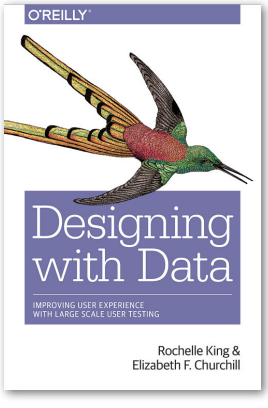


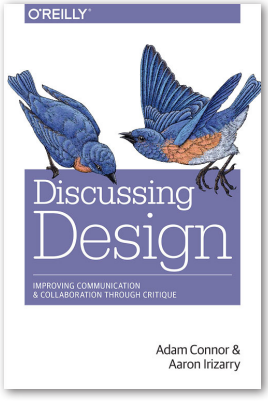



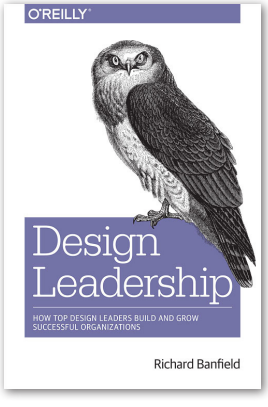



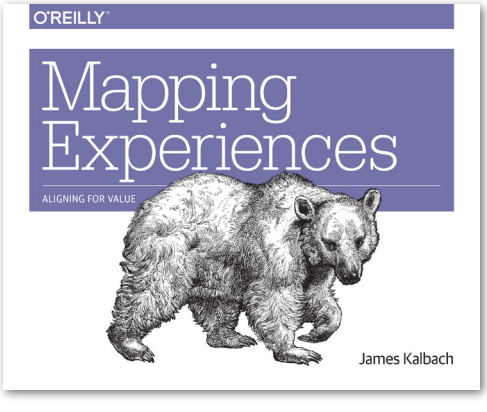


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# Design and Business

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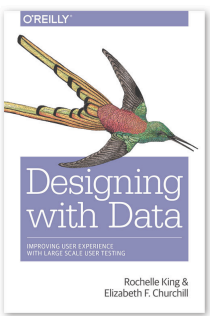


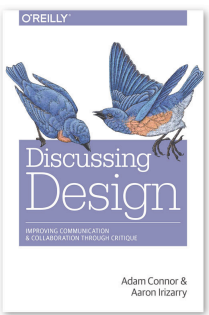



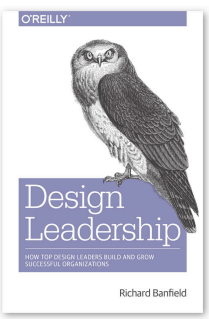


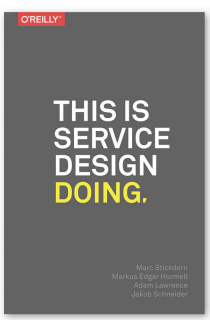


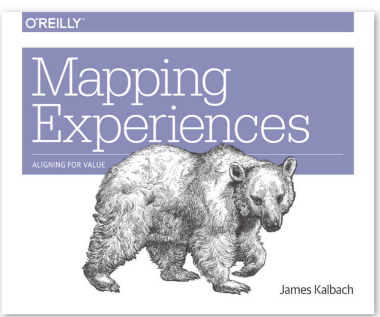


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# Design Leadership

HOW TOP DESIGN LEADERS BUILD AND GROW SUCCESSFUL ORGANIZATIONS

Richard Banfield

# Chapter 2

# Talent

## Introduction

In the early stages of a design company, finding the right talent to grow your team can seem like a distant problem. Particularly as you start out as a small group of founding members, seeking and developing talent on a regular basis simply isn't top of mind. But for larger teams and established studios, it is something that needs to be addressed almost daily. As the company grows, even the most loyal team members may move on and will need replacing. Our design leaders are constantly having to ask how they will find and keep the best people.

The reasons people leave design firms vary but, may be due to a change in personal circumstances, like getting married, having children, health concerns, moving states or even countries. Professional reasons for leaving a company are often characterized by the desire to move up or out. Up refers to ambition, while out is more likely due to dissatisfaction with the company or the team.

In our conversations with design business leaders, we learned that a significant reason people left teams was bad working relationships. What's noticeable, is that these failing relationships were almost always with their managers, so it is not the company they are leaving, it is the manager or a team dynamic that is not working for them. **The chemistry between team members and leaders seems to be the most often quoted reason for frustration**. It may take a long time for these frustrations to result in them leaving, but once it reaches that point it is very difficult to persuade them to stay with the team.

In an industry that is increasingly competitive, retaining talent has become a top priority for the design leaders we interviewed. Something that makes design leadership even more challenging is the fact that larger, more resource-rich companies are eager to add design talent to their teams. A rash of acquisitions and design team creations by companies such as Capital One, IBM, Accenture and Deloitte is an indication that these larger companies intend on being part of the design landscape. Headhunting and poaching are an unfortunate reality of the design and technology world and this, combined with design schools and institutions struggling to keep up with demand, means design leaders face an uphill battle.

Fortunately, some design leaders have been successful in attracting and, more importantly, retaining top-notch talent. This chapter sheds some light on their best practices and inside secrets.

## Small Teams and Building Out

Our interviews made it clear that for smaller companies or early stage teams an organic approach to growth is almost inevitable. In these startup stages, these small teams are mostly focused on getting the work done and are less concerned with a formal talent acquisition strategy, largely due to the fact that they almost always know the people they hire. Friends, family and acquaintances are the pool from which new talent emerges for these fledgling businesses.

**20% of leaders interviewed told us they relied on friends and family referrals for new hires**

As these companies grow the hiring practices become, by necessity more deliberate and structured. Very often these small teams don't have the luxury of support staff and rely on a more formalized approach to help with the hiring process. In parallel with the changes of a growing team is the need to change focus from one type of skill set to another.

"When we went from 7 to 15 people, the focus for hiring was always on billable production people; developers and designers," says Dominic Bortolussi, founder of The Working Group in Toronto. "I was doing project management and Andres (Bortolussi's partner) was doing project management. So every single person in the company, until we were 15, or even up to 20, were pretty much production people." In many of the companies we spoke to, this was the norm. Early employees would wear lots of different hats, which in essence was how they filled the gaps that would be filled by support staff further down the path of the business. As the teams got bigger the requirement for more support staff was an organic and natural progression. Instead of being surprised by this change in hiring focus, mature leaders prepared for the transition.

Anthony Armendariz, who runs Funsize a small--but growing--11-person product design studio in Austin TX, relies on existing relationships for now. "In terms of the recruiting, it's all been organic. Today we have only hired people that we know personally or that someone we work with knows personally, or we've had pretty good experience with. It's all referral-based recruiting, or we see someone we really want to work with and we'll try to find a way to work with them." Growing doesn't mean you can't hire your friends and family, but unless you have a large network, it might begin to get strained.

The hire-your-friends approach was reiterated by Marty Haught, founder of Boulder-based, Haught Codeworks. ”For many years, the people on the team were friends of mine that I've worked with over the years. I thought, ‘I really liked working with him, and I want him to work with me on these projects.’ So, a lot of it was that.” Haught acknowledges that as they’ve grown this strategy is giving way to an approach that includes some formal onboarding and training, “But lately, I've brought on two more junior members. One is actually doing a formal apprenticeship with Haught Codeworks. They've come recommended by some friends of mine.” When it comes to talent, the importance of your network is a constant theme for these design leaders.

From our conversations, it seems that startups and smaller design firms rely on their personal networks for talent. This makes perfect sense until the company grows to a point where these structures need to be formalized or unless the company is receiving outside funding and plans on growing quickly. We encountered only a handful of independently-owned design companies that intend on quick growth with the help of external funding. Venture-funded service design startups are extremely rare and were not part of the scope of our interviews.

## Developing Talent is Similar to Developing a Sales Pipeline

Approaching the talent pipeline in the same way that successful companies approach sales seems to be the key to finding great people. For service and product companies alike, to achieve sustained growth without the pains, you need a solid list of potential hires in your pipeline. If the sales pipeline is the lifeblood of a service business, then the talent pipeline is the air it breaths. For design teams that work within larger organizations the talent pipeline might be their core strategic effort. **Acknowledging that talent development is an ongoing effort that requires patience and planning is a trait we recognized in the most successful design leaders.**
Carl White of Think Brownstone, is emphatic about this, “We treat recruiting like we do business development. It's about relationships and it's going to take time.  Our pipeline for candidates is as active as our new business pipeline. We spend a lot of time, sometimes up to three months, recruiting folks. If we find someone that stands out we have a conversation with them, likely in-person.”

Even with the knowledge that establishing a talent pipeline is critical, many leaders are still not sure where to start. The key appears to lie in having a public conversation about the company and the work. “Being good about sharing everything that we know,” says Brian Williams, CEO of Viget. “We've been blogging for years. We try to go to conferences and speak at conferences as much as we can. We

encourage the staff to do that. We try to host events when we can in our space, to see what's suitable and helpful for folks. So just being a good member of the community is an important part of that,but really just trying to build up the reputation: do great work, share the work, be able to talk about that and do the little things that help people understand what the culture is all about. That tends to create a lot of connections and a lot of people come in that way."

Throwing a wide net creates a funnel that attracts talent to you, which means there are always prospects knocking at the door. Turning people away is a better problem to have than wondering where your next hire is coming from.

Just like sales pipelines there will be some opportunities that take longer to close than others. Occasionally, an ideal candidate may come along, but they already have a great job or the timing to join you isn't quite right yet. This is part of the process explains White, "If it's a good fit and it's a match then we keep them moving along but there are a lot of times we don't have an opportunity for them yet. I bet a third of the time, that's the way it's happened: 'I like you, you like me, but I'm in a relationship right now. If I get out of it and when the stars align let's get together.' That's worked really, really well for us."

Like a sales pipeline, flexibility is required and not all hiring strategies need to be the same. "If you're looking for a more senior hire, there's a certain point in their career when they are simply never going to get hired via a job board or requisition again." Jennifer Dary, head of the consultancy Plucky reminds us. "They'll get hired over drinks or lunch where you'll have several strategic conversations discussing your needs and theirs. It's so important to remember that these more senior hires will arrive in your pipeline differently than, say, a junior person fresh out of school. Your pipeline has to be flexible enough to account for a variety of paths and introductions."

Understanding how each team hires and grows requires an understanding of the type of culture a company supports. In the case of NGen Works: "The team actually hired the team," says Carl Smith. He adds,, "One of the things I'm really happiest about is that we realized early on, if you want people to have a sense of loyalty, you have to make sure that the people they're working with are the people who wanted them. The core team actually seeks out people they want to work with and invites them in to work on a project. That's the onboarding process. You actually join the team that wanted you on a project. Overtime, if it works out, they hire you. **The team hires the team**."

There is a key point to make here: Team members are not adding people to the team at random, instead, once a project has been approved by the client, the team members invite freelancers with specific project-related skills to join them on those projects. If a freelancer consistently provides value to the team, then they may be invited to join the company full-time. "Now the flip side, is the team fires the team. It's very much like Survivor. If it gets to a point where you're just not doing well, you will get voted off the island," cautions Smith. "They've jokingly started referring to me being voted off the island. I'm fine with it," he laughs.

Actively creating opportunities to meet new talent was a theme that came up again and again. With only a few exceptions, all of the interviewed leaders had a specific strategy to add new candidates to their talent funnel. Although hiring strategies varied widely, the consistent feature was that they weren't left to chance; there was always a planned approach with senior leadership involvement every step of the way.

"We've actually been talking about that over the last couple of days," Alex King, Crowd Favorite's founder and CEO at the time of the interview, pointed out when we met with him in their Denver head office. "One of the things I've done is write a document about how I've gone through the vetting process of candidates to try to share with the people that are going to be sharing that responsibility going forward." At our meeting in early 2014, King's company had recently been acquired when, because of health concerns King had begun to shift some of the responsibilities[1] from himself to other hiring managers. "We also have talked a little bit more about tailoring our job postings, make them more specific to the types of responsibilities and goals people will have in those roles, to try to help people self-select out if it's not a good fit for what they want. To make hiring more of an ongoing process, rather than something that we do just whenever there's a need."

**Which Came First, The Skills or The Passion?**

Recruiting, interviewing and onboarding new team members is arguably the company leader's highest priority responsibility. Our leaders are all in agreement that having the right people on the team has such far-reaching effects, that knowing how to get them on your team is critical. What's not so clear is whether leaders should be hunting for great skills, or seeking out passionate people who can learn them. .

[1] Alex King has subsequently left Crowd Favorite and now operates his own small business so he can focus on managing his health issues and spending time with his family.

“I'm a big fan of the scenario based interview”, says Dave Gray, President of Xplane. “So what you really want to know when you're interviewing someone is how they operate in difficult situations or how they handle interpersonal issues. I might ask them questions like: ‘Tell me about a time where you had an interpersonal conflict at work and what you did about it. Tell me about a time when you failed at something and learned a really important lesson that you still carry with you today. Tell me about the best boss you ever had. Tell me about the worst boss you ever had. Worst co-worker, best project, things like that. And what I'm looking for in a situational interview, is how does this person operate? How do they see the social systems that they're in? How do they handle conflict? I think that's very important. Do they avoid it? Do they address it? In what way do they interact with other people to get work done? Describe the kind of situation that you think they’ll find themselves in at work and see if you can identify and get from them similar situations that they've been in, in the past and how they thought about it, how they handled it.”

Finding the right chemistry also means setting your sights on the right qualities. “You don't find good talent, you find great people and you develop talent,” says Zurb founder and CEO, Bryan Zmijewski.“If you think you're going to find a rock star, good luck.” This idea that talent is crafted and not something people are born with, came up regularly in our interviews. **Design leaders acknowledge that people may come with a passion for design but that the talent for good design can be taught.** “I've never been of the mindset that there's a perfect employee, a perfect person,” continues Zmijewski. “You kind of adapt your organization to people that are very passionate about what they're doing, that have a good work ethic and, respect each other. When you foster an environment like that you'd be amazed at how much potential comes out of people.”

## Hire People Smarter Than You

It may be a little cliche, but it’s a mantra we heard frequently: Hire people who are smarter than you Interestingly, these design leaders are not just hiring smart people, hey are hiring smart people that can carry forward the vision of the company in ways the founders may not be able to. “I hire people that are much better than I could ever be at what they do,” says Tracey Halvorsen, President and Chief Visionary Officer at Baltimore-based FastSpot. “I have great designers, great programmers, great project managers. I always think that what I'm best at is helping get everyone to move along, but they're much better at doing the stuff. They make me look good.”

It's not just finding people who are smart but also, people who are committed to their organization's goals and to their craft. As Bortolussi at The Working Group points out, "The objective then is to find people who are aligned with how we work. We enjoy our work together, we ask for excellence and we have a lot of fun doing it. So, we look for people who are aligned with that and, who are really good at what they do and want a career as a master craftsman--whether that's as a developer or designer."

But hiring people that are smarter than you isn't enough, you also have to hire people that are different to you. Diversity isn't just an intellectual challenge, it's the secret sauce of successful design firms.

**Diversity of Skills**

Closely related to the idea of hiring people with superior soft and hard skills is the idea that not all skilled people should be considered equal. Hard skills are generally technical skills, like programming a language, using a design application or proposal writing. Soft skills refer to things like communication, presentation and conflict resolution skills. These latter skills can sometimes be harder to assess but they are the skills that successful design companies rely on to deliver real value to their clients. Some hires are going to make terrific individual contributions while others will take on broader management roles. Understanding whose strengths and weaknesses fit into the jigsaw puzzle of a company's organization is key to a team's success.

We asked our design leaders what they are always looking for in terms of team skills and chemistry. Jeb Banner, CEO and co-founder of Smallbox, located in Indianapolis, likes people who push him out of his comfort zone. "I want people that are unafraid to challenge me and others, but have the skills to do it in a loving, kind way. I want people that are better than me. In a way, the fact that I'm not a designer and developer hurts sometimes, because I have trouble being a collaborator on those things where I'd like to be. But I really look for people that have talents and skills that I just look at and say, 'Wow. I can't imagine having this skill set' because every time I see something they do it makes me think in a wider way about the potential. So I always want people to broaden my thinking, not narrow it."

Building teams around the idea of 'who's on the bus' and who still needs to get on the bus came up several times during our interviews. The bus metaphor, originally developed by the business researcher and author Jim Collins[2], appeared in the business classic Good to Great. Throughout the interviews, the

2 "Good to Great: Why Some Companies Make the Leap...And Others Don't" by Jim Collins, October 16, 2001

idea was regularly referred to directly or in concept and appears to resonate with the approach that many of the leaders we met with have employed. Collin's idea suggests that each company is like a bus about to head off for a destination, metaphorically, its mission or purpose. Putting the right people on the bus--seated in the right seats--and getting the wrong people off the bus, is one of the lessons from Collins' book. "I think the biggest thing I look when I'm hiring new members is what's missing from the team," says Skottie O'Mahony, Creative Director for BancVue. "I look for someone who has some talent or some background or some experience that the other people on the team can learn from."

Critical to success in the design space, is finding people with both hard and soft skills. So much of the design process is people-orientated, that or high-performing design firms, interfacing with clients requires excellent writing and presentation skills. "Now that we have dedicated project managers, it's an interesting skill-set, we want detail-oriented people who enjoy the communication, people who are able to manage clients, manage the accounts well. It's a different skill-set than what a developer needs to have." **Building teams of people with different skill sets raises the tide for the whole group**. Diversity in skills, backgrounds and thinking appears to encourage everyone on the team to be more empathetic and understanding - a critical part of all design disciplines.

O'Mahony, whose product design team numbered 30 when we interviewed him, has the same holistic view of diversity that we encountered among the majority of the design leaders. "I was looking for people that had user research experience because we didn't have that on the team. People that had different backgrounds--like illustration or video--because it's those areas that we would like to grow in, but are still in their infancy. I figured if I could get people on the team that had that experience, they would help the entire team."

Gender is the diversity elephant in the room. There is definitely a gender bias towards more male designers in our industry. Several leaders we spoke to were concerned about this. "We've got a very diverse team here, but we're trying to get it more gender balanced as well, which is another challenge," admits The Working Group's Bortolussi. "We're sort of becoming the classic agency; where half the designers are women and all the developers are men. We're trying to change that, and we're trying to encourage that change.t's ongoing." This problem isn't just about equal opportunity, gender diversity brings the necessary diversity of perspective so critical for good design. Lots of initiatives to balance the gender inequity are being undertaken. This topic is important, but too broad for the parameters of this book. We hope to see the design industry create a good example for all other industries.

## Grow Out of Your Shoes Not Into Them

Talent growth can be structured and planned but this does not mean you have to hire ahead of your immediate needs. Anthony Armendariz shared his anxieties about hiring with us at the Funsize office overlooking bustling 6th Street in Austin. “We assembled the team by being scared. Natalie (Funsize co-founder) and I were really worried about payroll. We had never been put in a situation where we had to pay payroll and so, in the early days we were kind of scared. Everyone has always started out as a contractor, so we made sure they fit in culturally, had the contributions we needed, the right skills. Then it usually resulted in a relationship that we didn’t want to lose, so we began growing that way. Once we realized we had five or six people, it became pretty clear that we needed to make long-term, full-time hire commitments.”

It’s worth reiterating that formalizing hiring is not the same as getting ahead of company growth. Talent is a design services firm’s highest cost. Adding team members has to be done with care but not so slowly that it hurts productivity. This balancing act isn’t easy. Our leaders repeatedly mentioned that this dance between adding new talent and getting the best out of their existing team was a constant struggle. The most successful leaders used their sales pipeline to dictate their staffing needs.

Letting the future growth needs of the company dictate hiring decisions might seem like the straightforward approach. Logic suggests that you should plan ahead for hiring and stick to that plan. In the world of design services that’s not always the best way forward. Planning too far ahead can defy the reality of the situation. If you don’t have the client work to pay for the growth in staff then hiring based on a plan alone can backfire.

To punctuate this lesson is a cautionary tale from Greg Hoy, the CEO of Happy Cog: “Some of the staffing decisions that we've made were probably a bit ambitious in terms of getting a number of people in at one time to satisfy a need that we anticipated. Staffing up to support a pipeline that looks one way one week and another way two weeks later, is a roll of the dice. Hopefully, you have put enough thought behind it so it's not going to be a situation where you have too many people.” In early 2014 Happy Cog had started experimenting with a “team-based model” and had pre-emptively hired designers and developers to fill one of their teams. When business development expectations changed and were unable to service this team, they had to make the tough decision to let the some of those people go. Greg remains philosophical about those lessons and reminds us that it’s always the sales pipeline that determines your growth.

Ultimately the design leaders we spoke to agreed that they would rather have a slightly understaffed team than carry the overhead of underutilized people. Although it can be daunting to take on work when you don't have the people to deliver it, it's easier to fill in the gaps than to deal with the stressful burden of a negative cash flow. This is generally true of small to medium-sized service agencies, but may not be true of well-funded startups, larger companies or internal design teams. The latter group will often have a longer runway of cash or alternative sources of income to support team growth in anticipation of required work.

It's not always about hiring the right people at the wrong time and finding the company overstaffed, without the workflow to support these new hires. There's danger too, in hiring the wrong people for the wrong reasons. Each hire should contribute to the needs of the overall team and fill any skill gaps within that team."You should never be in a massive rush to hire the wrong person" says Jeff Kushmerek, currently head of product at Virgin Pulse, "That person who's dying for a job because he's got mouths to feed, you should never jump into the wrong thing, because he's going to be unhappy with me, or my style, or unhappy with the job that's put in front of him as well." Kushmerek goes on to say that he's looking for complementary skills as well, "We should always fill in those holes. You don't want people who are just going to be a replica of yourself".

This sentiment was almost universal in our interviews. When hiring, successful design leaders look for people with common values but who also have skills that fill the gaps in their current teams. You might say that the ideal candidate for these design leaders will have the similar goals, values, and communication styles but different experiences, perspectives and skills.

## Hire Coachable People Willing to Learn

Many of the successful leaders we interviewed preferred hiring younger talent and then investing time and money in teaching them the skills they need. This wasn't a majority opinion but it certainly was the most popular approach. Specifically they would hire younger talent who displayed good soft skills or showed potential. In the design industries, soft skills refer to communication and people skills. Being a good presenter or communicator or having conflict resolutions skills appealed to our leaders far more than only the ability to push pixels or write code.

**37% of leaders interviewed said that the preferred to "hire young and train them up."**

One important consideration with this approach is that youth cannot be a substitute for maturity and experience. There are certainly mature young designers and developers out there but it's unlikely that every young candidate will have the level of maturity or depth of experience you seek. Furthermore, youth often comes with the requirement of training in new skills. If you're not set up to train relatively inexperienced staff, this approach can slow productivity down. This was something we experienced first-hand at Fresh Tilled Soil and it was reaffirmed by Jon Lax, co-founder of Teehan+Lax, "We learned very early on that we weren't that great at hiring junior staff and coaching them up. We were just better off when people had a little bit more maturity. As a result, we tend to hire people who are maybe in their third or fourth year of their career before they come here."

As we discuss in the chapter on culture, the type of organization you create will either support hiring practices aimed at attracting highly polished expertise or developing young rough diamonds. Hiring younger designers, developers or project managers may appear to be a cost saving strategy but comes with the clear disadvantage that those people won't always have the experience you need. This requires an investment of time to develop the missing skills and may cancel out some of the benefits of cheaper talent.

Plucky's Jennifer Dary warns against the tendency to think of junior talent as a cost-saving strategy. "I completely agree that home-grown talent can be some of the most loyal and culturally dynamic members of a team. But I also want to point out that many agencies will hire junior folks to save some money without building the infrastructure to mentor these people. It's sink or swim. The millennial generation in particular prefers mentorship and explicit guidance. I see it time and time again; organizations hire junior and assign them to the busiest person at the place. Mentoring takes time, effort and bandwidth. You may be saving money on salary, but you've got to be ready to spend a senior person's hours to invest in the hire as well." Dary's caution is something we heard repeated by our design leaders. Although most agreed that despite there being a real cost to training and mentoring, the investment is well worth it. Design leaders thinking that young, cheap talent is a shortcut, might ultimately pay the price further down the line.

Hiring senior designers and developers brings its own set of challenges: cost being the most obvious and, in some cases, bad habits learned elsewhere. Many of the leaders interviewed for this book expressed concern about hiring before getting to know the candidate. This underlines the preference successful design leaders have for soft skills and good chemistry. Just having hard skills very often is not enough in

such a collaborative industry. A good proportion of them recommend a “try before you buy” approach, described by Carl White, CEO and founder of Philadelphia-based design studio Think Brownstone: “Some of the brightest people we've hired haven't had a lot of experience in this field, but they're some of our best folks. We can tell, once you meet folks and they do some ‘ride alongs’ with us, you can see them grabbing on to it and doing it. They've been our best.” This approach is also catching on in more formal apprenticeship based models. The successful nature of design apprenticeships has been long known in Europe and Japan but has only recently starting to catch on in North America. More on this topic at the end of the chapter.

Connected to hiring coachable people is hiring talent with the motivation to succeed. “I don't know if I'm going to get in trouble for saying this, but I love hiring immigrants, first-generation people,” says Bortolussi. “They've got all the passion--building a career in a new country and a new place--their work ethic is amazing, attitude is amazing, there's no self-entitlement. This is, of course, not to say that everyone who isn't a first generation or an immigrant doesn't have that. I don't go out of my way to hire immigrants, but I find that we have a high number of people who have recently settled in Canada, or whose parents are settled in Canada. I don't know why that is, but we all get along really well. I think maybe it's the nature of the industry. It's STEM-focused, there's a lot of science, the technology piece of it tends to favor a lot of people from Asia, Southeast Asia, as well as the Middle East.” As an immigrant myself, I support Bortolussi’s insights. Coming to the US from another country means you have a lot at stake. Your family’s expectations, proving your worth and not wanting to let your own culture down are just a few  of the considerations an immigrant might face. These externalities can be powerful motivators.

John Torres, Digital Design Director of America's Test Kitchen agrees with the finding the right motivations. “I’m looking for small egos. Smart people who are passionate about the outcome, rather than putting their stamp on the thing.”

At Fresh Tilled Soil, we took the idea that the best talent is coachable and created the Apprentice in User Experience or AUX. In an effort to stay on top of our talent needs we developed an 110-day program which also includes a pre-program boot camp to sift out the pretenders. The goal is to turn promising designers and developers into UX pros through structured learning, one-on-one mentorship, and client-facing experience. Apprentices that make it through boot camp are paired with a mentor to help guide them through the challenges. All apprentices participate in lectures and several challenges meant to develop new skills. They also get to work on client projects for valuable real-world experience. Once they graduate they either join our team as full-time employees or are placed with partner or client teams. These

apprenticeship programs are becoming increasingly popular in the design space. Established programs are available at industry leadership companies like Sparkbox, Thoughtbot, Upstatement, Merge, and Detroit Labs. Given the success of these programs, more will no doubt follow.

## Growing Teams

Reflecting on Jim Collin's bus metaphor again, leaders will need to know who stays on the bus, who gets off and what new seats need to be filled. The threat is that hiring managers don't simply hire people who are just like them. Scott Baldwin, Director of User Experience Design at Yellow Pencil's Vancouver office reminds us that hiring 'clones' isn't going to satisfy the needs of the organization, "I find in a lot of cases, that doesn't create an interesting tension within the group. If you have people of mixed cultures, if that makes sense or mixed personality, I think you get a more interesting and dynamic team."

As companies grow so does the complexity of the hiring process. Firms and teams that once relied on word-of-mouth talent referrals are now faced with new problems - job diversification and pipeline volume. "Once we hit a certain point, somewhere after the twenties, it became painfully evident that we needed a few more types of roles built in there," says Dominic Bortolussi. Smaller companies will require their people to wear multiple hats. As teams expand this becomes unsustainable. With the segmentation of jobs, comes the necessity to hire more deliberately for those specific roles. "More project management, more product management, an office coordinator, an office admin. Now we have an HR person. There's a number of roles that emerged over time, and so that's how the team has shifted. So now when I'm interviewing people," says Bortolussi, "I'm still looking for that lifestyle and cultural fit, so that we know people will get along, but the skill set is broadened from being just an amazing designer or helper to having a lot of other types of skills."

Think Brownstone's White, prefers to work with candidates as freelancers before committing to full-time roles admits. " As we've gotten bigger and our process is a little more fleshed out, we probably do less of the try-before-you-buy approach. It's going to get harder too. We have somebody right now that has no experience in this field but who we think would be great."

Diversity of experience means diversity of opinion and an increasing need for good chemistry within the team. As teams grow it's naive to think that everyone you hire will have the perfect set of skills or consistently agree on the approach to the problems you're solving. The key is to find good chemistry between the team members. A well bonded team can work well together even if they have differing

opinions on the work. As discussed throughout this chapter, ensuring diversity in growing teams is key to our leader's success. "I hired people who have opinions about everything. So even if you're a UI designer you should have an opinion about UX" says John Torres. "I want to work with adults with personalities that mesh well together. It's my job to build teams and companies, not products and things." This last point by John might be the best thing we've heard about design leadership: **The leader's job is not to create the designs but to create the team and culture to give birth to these designs**. This is the ultimate role for leaders in the acquisition or creation of talent.

Finding personalities that gel well together while allowing for robust debate when necessary, gives teams the variety of perspectives so crucial in great design work. This isn't always straightforward when a team is already established. When old habits and dominant personalities are well established there are a different set of challenges facing leaders. In many cases, the grooves have been well worn and changing them is extremely hard. Over time, and without even realizing it, teams can start to look too homogeneous. "There are managers who essentially hire themselves, and there are managers who hire different people," observes Yellow Pencil's Baldwin, "And I look for a mix of both. People that diversify and play off skill sets that I don't have, or where I can learn something from them as much as they're learning from me. Ideally we should be working collectively as a team, and growing in that way. Whereas I think in a lot of cases, managers will hire replicas of themselves."

When we met with Neil McPhedran, General Manager at Grey in Vancouver, he had recently taken on the General Manager role. He was inheriting an existing team but had the opportunity to reorganize the team. We asked him about how he approached these challenges from both a team creation and from an ongoing cultural point of view. "When I walked in the door there had been a few moves made with some folks who had been here for a long time, so we had a good core that was still here. It's taken some time to assess opinions from other folks as to who should be and who shouldn't be here and I've definitely come at it from a different perspective--I've got a different take on things-- since I'm on ground here and can feel it, versus what management in Toronto thought."

Talented people come from many walks of life. Differences in personalities and cultures breathe new ideas into a design conversation. The path they've taken to becoming designers or developers is just as varied as the personalities. Traditional design education isn't the only way to get to the design industry. "I think I've come across two paths", says Greg Storey, ex-CMO of Happy Cog, "I've worked with and I've hired students who came out of design school where they have a lot of tactical experience, you know they kind of paraded through applications and a little bit of history, a little bit of process, more of how-to stuff.

And then, I've come across and worked with a lot of people who just taught themselves everything they needed to know along the way and felt more street smart. There's definitely a place for both."

**Finding Balance and Letting Go**

The flipside of any talent acquisition strategy is knowing when to dinvest. John Torres, Digital Design Director at America's Test Kitchen says, "If you're having a lot of meetings to talk about a particular ongoing behavior or what someone is doing wrong or how they react to others, then you are spending too much time on that person, and they need to go." We like this perspective on letting people go and it might be distilled into a question design leaders can ask themselves: "If I had to hire this person all over again, would I?" The answer to that question should give leaders a clear path to the decision to either break ties or invest more into that team member.

Part of considering whether someone should stay or go can be gleaned from taking their perspective on the situation. Very often, someone who you might feel is questionable is feeling the same way. They might already be thinking about moving on and they just need to have that conversation. "It might be in recognizing that certain people on that team just really aren't meant to be part of that team, or that group, or that job function," says Scott Baldwin of Yellow Pencil, "I've had a few people in my career who clearly weren't passionate about the work that they were doing, and just didn't belong there. They're kind of along for the ride." Part of discovering their perspective, he goes on to say, "was encouraging them to find the kind of thing that they were passionate about. Realizing that it wasn't here, and allowing them to figure out their own exit, versus giving them the kick out the door." This approach benefits both sides. **It's less about what's wrong and more about finding what's right.** Their performance, or lack thereof, might be the most obvious thing to talk about, but digging a bit will reveal a deeper opportunity for both the leader and the team member.

Letting people go isn't always about individual performance. If the company or team is struggling and under financial pressure, layoffs need to happen, laying off good people is one of the hardest things a leader will have to do. The lesson here is to build a team that balances the need for high productivity with what the organization can afford. Over-investing in a team can force layoffs when the work pipeline dries up or the funding slows down. Hire only when you absolutely have to as XPLANE's Dave Gray learned the hard way, "Hiring people then having to let them go, that was a very painful thing. When you've had layoffs in your company, it makes you a lot more conscious and conservative in terms of growth and hiring. That morning, I was coming in to work having to lay off about half the workforce and one guy that

was going to get laid off told me that he had just bought a house. He walked in the door and was like 'I bought a house!' And I was like, 'oh man'. You don't want to have that feeling. You don't want to do that to people. So, my feeling ... my lesson is: hire slowly."

The beneficial outcome of this hard-learned lesson, is that XPLANE has since developed a policy that supports growth but doesn't subject the business to stress when inevitable fluctuations happen. Gray explains, "We have a policy at XPLANE to do about 20 to 30 percent of our work with contractors and freelancers, because we have that kind of fluctuation in our business. We don't want to be hiring people and letting them go and creating that kind of see-saw effect. We want to always maintain a certain balance of the work between full-time and part-time and freelance people that gives us a lot more consistency and slow and steady growth."

This was a hiring strategy used at several of the companies we interviewed but be careful, this approach can be a legal quagmire. It's worth noting that, in most states, state and federal law prohibits companies from keeping on freelancers when the work they are doing is stated as a core service of the firm. For example, if your business offers web design services, you cannot employ a freelance web designer for any extended period of time. How do you know whether you're bumping up against the law with your freelancers? The golden rule is: If it looks like a duck, swims like a duck, and quacks like a duck, then it probably is a duck.

## Apprenticeships

In Western Europe, apprenticeship programs have been around for a very long time and are integrated into the fabric of almost all industries. The apprenticeship model is new to the North American working culture but it seems to be catching on in the design space. Several design leaders mentioned apprenticeship programs as a high value way to get the best talent into their organizations.

It's important to note that an apprenticeship is not an internship. The goal of most apprenticeships is to receive a very specific hands-on design education from the organization and eventually get promoted to a full-time designer, developer or strategist. If recruited correctly, the apprenticeship position is held by someone who already has a formal education and some experience in the industry. Most apprentices would be seeking roles above the entry level positions normally serviced by internships and probationary contracts. Positions are limited and the bar is normally high for qualification into the program so only a few applicants will make it into these programs.

The small numbers of apprentices is made up for by the high quality of the graduates. Unlike internships where the intern is padding their resume or just exploring options for their career, the design apprenticeships are for those that have already committed to a career in design. Whereas internships might be unpaid and aimed at part-time employees who are still in school, the apprenticeships are almost always full-time paid positions for school graduates. The companies we interviewed that run apprenticeship programs have very specific full-time roles to fill. For the programs to have the deepest impact on the company the apprentices work side-by-side with senior team members on actual client work.

Many design leaders also see apprenticeships as a smarter alternative to using recruiters. Outsourcing the acquisition of talent is not only expensive but risky too. On average recruiters charge 20% of the first year's salary of the placed employee. Unfortunately, this is not the most expensive part of recruiting this way. The real cost will come when recruits aren't matched technically or culturally to the company. Poorly matched hires can result in longer term problems like retraining, team conflicts and, possibly the worst, having to lay the hire off and start the hiring process from scratch. When hires are done on the basis of resumes and interviews alone design leaders are essentially placing a bet on new hires.

Bad chemistry between new and existing team members is one of the most frequently mentioned reasons why projects run into problems. Apprenticeships reduce that risk by giving leaders several weeks, or months, to get to know the candidates and integrate them into their teams. Furthermore, these candidates are often on client facing teams giving leaders further insight into their soft skills in dealing with tough situations. If those weren't enough reasons to run an apprenticeship program, the design leaders we spoke to also considered apprenticeships to be profit centers. Unlike interns that are very junior and performing low-value work, apprentices are almost always working on client projects and are therefore billable.

Let's take a closer look at how these programs work to achieve these outcomes. At Fresh Tilled Soil we've been running a successful apprenticeship program for the last 3-years. The program is called AUX (Apprentice in User Experience) and it works like this:

- We run three semesters per year.
- Three times a year we announce through our channels that a session is accepting applications and receive about 25-35 applicants.
- Applicants go through a round of phone interviews, reference checks, code audits and portfolio reviews.

- From the initial group about 10-12 are selected to participate in a 2-week 'design thinking' bootcamp.
- The bootcamp is held on two consecutive Saturdays (each about 4-5 hrs).
- Participants in the boot camp work on several challenges and the best candidates are selected from the full-time program.
- Only 4 to 5 candidates are selected from the boot camp.
- The program is 16-weeks of paid full-time employment.
- The AUX's time is divided into 50% training and 50% client work. In other words, they are 50% billable.
- At the end of the 15-weeks we select the top AUX graduates and offer them a full-time job. On average two will get offers.
- Graduates that don't get offers for full-time positions at the firm will get introductions to other companies looking for designers.

The math:

- The selection process requires about 15-20 hours from a senior person to manage. That's about $3,750-$5,000 of the program manager's time in billable terms.
- Additionally, training and mentoring takes about 5 hours per week. This workload is split between the entire team of 30 designers, developers, strategists and project managers.
- When combining these indirect expenses, each cohort costs about $18,000 to manage.
- Over the three semesters the annualized cost is about $54,000.
- Apprentices are paid $500/week, so that works out to $8,000 per apprentice for the 16 weeks. That's about $96,000 per year.
- All in, we spend about $150K per year to get 12 exceptionally well trained designers and developers.
- We bill approximately $300K-$350K for their total time over the year.
- Dollars paid to recruiters: $0
- Net profit: $150K-$200K/year

The benefits:

- We are in control of which candidates we can invest our time and money.
- We can train candidates in the areas that fit best with our client work.
- Observing their soft skills (communication, presentation, conflict resolution, etc.) in challenging team and client situations is invaluable.
- We can monitor for cultural fit or personality conflicts.
- It's profitable!

- Graduates that don't get full-time jobs at Fresh Tilled Soil are introduced to our clients, partners and friends. There are now over 35 graduates working at various places around the US. Several of these placements have resulted in referral work. One referral resulted in a $30K/month retainer.

Apprentice programs have some shortfalls. These programs need supervision from senior team members throughout the year. Design leaders without a senior team to rely on for this support may struggle to find time for these activities. Apprenticeships are also not ideal for recruiting senior or executive staff members. Our design leaders didn't feel this was necessarily a problem because realistically those high-level positions would come from either internal promotions or their own professional network.

For detailed information on apprentiship programs in North America visit http://apprentice.at/

## Final Word

Almost none of the companies we interviewed used external recruiters to find new talent. We found this surprising considering the high volume of calls and emails we receive from recruiters at our own firm. However, the majority of the companies we spoke to either have a strong reputation in the community--which by default will attract talent--or run internal programs to develop junior talent and in these ways are consciously nurturing the talent pipeline we have discussed in this chapter. . Our experience , both as practitioners of talent development and never having relied on recruiters ourselves, is that it is possible to grow your team without the help of external recruiters. The caveat to this is that a few of the larger companies we interviewed used an internal recruiter or human resources person to fill that void.

Jennifer Dary leaves us with questions about retaining talent, "Companies spend a lot of money hiring people. From the job postings to the hours spent interviewing, to the referral fees, it really adds up. Hiring, frankly, is a boring and expensive problem to solve. What is *more* interesting to me is retention and the strategies we put together in this area. Why are you losing bright people? How would your culture need to evolve to keep them? How are you tackling career paths (or not)? These are vital questions that need to be answered in any retention strategy."

In our chapter on Culture, we hope to provide insight into these questions.

**Key Takeaways**

- A talent pipeline is just like a sales pipeline - invest in it constantly

- Hire people that are smarter than you
- When possible, hire people with great soft skills and train the hard skills
- Diversity adds to the creativity and wisdom of the team
- Coachable people are often better than knowledgeable people
- Hiring young or inexperienced people isn’t always a cost saving
- Hire when capacity is consistently at its maximum, but not before
- Consider freelancers to buffer for the ups and downs of your business cycles
- Apprenticeships are invaluable and an alternative to expensive recruiting models
- Apprentice programs can be great talent pipelines and profit centers


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# Chapter 2

## How to Create Products People Want

### Avoiding "Ego-First Development"

"What if you launch your product...and nobody buys it?"

As a would-be 30x500 bootcamp graduate — a class that teaches people how to create and sell their first products — these were the words that compelled me to become a student. It was a moment that would change my life.

Less than six months after graduating from the course, I created two products from scratch that made more money with less customers than the venture-backed startup I was a part of for almost five years.

This is a testament to the 30x500 approach: it forces product creators to cut directly to the heart of why a product should exist: *to find a customer*.

Again, these sentiments aren't new. I was paraphrasing Peter Drucker's words from almost 50 years ago: "the purpose of the enterprise is to create a customer."[1]

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[1] "The Practice of Management" (1993). p 317

Talk about cutting directly to what's been causing technology's all-too-frequent product failures.

That's, in fact, one of the motivations Amy and Alex had for creating the 30x500 bootcamp: railing against the phenomenon they call "ego-first development:" *thinking that a product or idea is special just because it's yours*.

It's a fallacy that sets you up for failure. It creates an endless cycle of throwing ideas against the wall with the hopes of finding something that works. Hoy puts it like this:

"*The core problem with so many businesses is that they're based on what the business owner wants. They're fantasizing about being the hero: 'I'm going to ride in on my white 'software' horse, and save these poor people.*'[2]"

The four years that the duo have run their elite training program have produced incredible statistics. Students who have never created a product in their lives have gone on to make tens of thousands of dollars for themselves in the first few months after following the 30x500 framework. Other product rookies were generating five figures in recurring revenue after only a few months. Their students have gone on to gross over $2 million in aggregate sales over the bootcamp's lifespan — despite the fact that the course is offered on an extremely-limited basis.

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[2] http://productpeople.tv/2014/02/07/amy-hoy/

One of their core teachings is this: creating a product based primarily on what *you* want focuses the product in exactly the wrong direction. By doing so, the primary benefit becomes the fact that *you've* created it, instead of what your product can do for others.

Ego-first development flies in the face of everything we've explored about how successful products are made. That's because, as we've seen, concocting a product idea is really an act of listening. And without knowing who you're serving and what they need, building product is simply another form of optimistic speculation.

But wouldn't the "Build-Measure-Learn" feedback loop that's been popularized by the *Lean Startup* solve this problem? Isn't the right path to "validate" your ideas with a "minimum viable product" through customer interviews?

The methodology behind the 30x500 class flies directly in the face of what's become common wisdom and all-too-frequent buzzwords in technologyland. Notions of "customer validation," "minimum viable product," and "pivoting" are concepts that have successfully woven themselves deep into startup culture. But startup deaths aren't letting up[3], despite the influx of capital and talent into technology startups and the occasional high-profile successes like Facebook, LinkedIn, and Groupon in recent years.[4] Despite the flood of cheap and eager money, 70 percent of dead technology companies were in the internet sector.

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[3] https://www.cbinsights.com/blog/startup-death-data/
[4] https://www.cbinsights.com/blog/billion-dollar-exit-venture-capital/

The core tenet of the ready-fire-aim approach found in the Lean Startup framework is believing that one can find customers by asking what they want. But this is an inherently flawed notion, because doing so relies upon:

* Your ability to get your ego out of the way and to ask exactly the right questions at the right time from the right people.
* Your potential customers being rational or aware enough to identify their own habits, wax eloquently about what bothers them, and what would make them happy.
* A freely-accessible pool of people who aren't going to tell you just what you want to hear, and who don't change their habits after you interview them.

Hillman likens this belief to the dichotomy between observing lions in the zoo and how they behave in the wild:

"*Imagine going to see the lions on display in the zoo. Now imagine seeing the same species of lion in the wild on an African safari. Technically, you're looking at the same animal both times. But they behave differently in the wild than they do in captivity.*

"*You wouldn't make a judgement call about what MOST lions do based on a lion in a zoo, because MOST lions aren't in zoos.*[5]"

[5] https://unicornfree.com/2014/validation-is-backwards

So, what happens when you observe your customers like you'd observe lions on a safari? What happens when creating a new product *isn't* an exercise in the "extreme uncertainty" espoused by the Lean Startup model?

You'll know what your customer's problems are. You'll know what makes them happy and how they speak with each other. You'll know exactly what to say and how to say it to pique their interest. And, ultimately, you'll know how to make them want to use your product.

This approach forms the basis of 30x500's modern ethnographic approach. Fittingly called "Sales Safari," it's a system that observes what your customers are already doing and turns those habits into the basis for product ideas.

Let's take a look at Sales Safari now.

**Find Product Ideas with Sales Safari**

Going on a Sales Safari is the process of uncovering product ideas hiding in plain sight. It places the work of coming up with these ideas on your potential customers, and lays a foundation for repeatable success. Based on the observation techniques used by Lillian Gilbreth and Henry Dreyfuss, Sales Safari is what Amy Hoy — the method's inventor — calls "net ethnography."

"*Sales Safari is 'net ethnography,' combined with some close reading and empathy*," Hoy says. "*[It's] step-by-step empathizing with your customer to understand them.*"

In case you've forgotten, ethnography's central premise is that you can learn what people *actually* do when they're not aware that you're looking. By observing what people do and say, you'll understand how people behave on their terms and not on yours.

Why's this important when creating products? Because this observation enlightens us about two really important things: the contexts in which customers might use a product, and how that affects the relative value of your product in their daily lives.[6]

"*The key is you start by observing what [your customers] actually already do*," Hoy continues. "*You don't try to persuade a vegetarian to buy Omaha Steaks. You look at what they actually do in real life on the Internet. What they read. What they share with each other. The problems they discuss. What things that they ask help for. How they help others.*"

What's particularly unique about Sales Safari is that it takes place entirely online, for a number of reasons:

* Access. You can reach almost any unique community that exists on Earth without leaving your chair.
* Speed. Online research affords tons of conveniences like search engines, copy and paste, and more. Doing offline research is much harder to complete — and much harder to obtain without it being tainted by your presence.

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[6] http://methodsofdiscovery.net/?q=node/19

* A reliable record. When people are speaking in "meatspace," you either have to remember what they said, scribble notes, or awkwardly record your conversation. Online observation, though, is out there for you to read and parse at your leisure.
* Time to analyze. Online observation provides "the ability to disassociate what someone is saying from what you interpret them saying," says 30x500 co-teacher Alex Hillman.
* Distance. You're not physically present to influence anybody's opinions, nor are you tempted to pull the *research pitch* — the act of pitching your product while asking people what they want. "People need to not know that you're there watching," Hillman continues. "That sounds really creepy to say it that way, but there's a reason for it. This is professional lurking if you want to look at it that way. You're there to watch what they do and say when they don't know that you're there."
* Perspective. You literally have access to the entire Internet to find people in a particular audience. You're not limited to a local Meetup or user group; instead, you can get the full picture of an audience's pains from around the world.

Sales Safari's intentional distance is designed to avoid the pitfalls of asking questions and influencing your subjects. In ethnographic circles, this is known as avoiding the "Margaret Mead problem." Her story is a cautionary tale, and a predominant example of how being too close to the people you're studying can distort the truth.

It's 1928. Anthropologist Margaret Mead's finished writing her book, *Coming of Age in Samoa*, a study of the lives of teenage girls there: how they came of age, what their family structures were like, and so on.

The quick-and-dirty of the Mead story is that she lived with the villagers, asked about their lives, and listened to their stories — many of which were later revealed to have been made up by her teenage subjects. She took these stories at face value instead of observing their behavior.[7] Years later, anthropologist Derek Freeman returned to the village, where the now-elderly teenage girls from Mead's study admitted to making up stories just for fun.[8]

That's why *observing* people and not asking them is at the center of creating products that find a customer. And creating products that find customers depend on finding their *pain*.

Sales Safari's designed to root out people's pain. Because if you can discern what people's problems are, then chances are you're the one who'll be able to solve those problems.

"*People walk around trying to tune out their problems, because they don't expect that they can solve them*," says Hoy. "*You have to reflect back to them. 'Hey, this is the problem that you're having. You know, it's a big deal, but also we can fix it together*.'"

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[7] http://www.loc.gov/exhibits/mead/field-samoa.html

[8] http://en.wikipedia.org/wiki/Coming*of*Age*in*Samoa#Critique*of*Mead.27s*methodology*and_conclusions

Pain and problems — revealed by observation and empathy. It's not a flashy notion, nor is it particularly groundbreaking. But it's been at the center of how successful products get made for over a century.

But by using modern online tools, Sales Safari can help you to start recognizing the patterns among your audience.

"*In order for someone to go on the Internet and ask a question of a group of strangers about how to solve their problem, [it's] a very strong indicator of the level of pain they're in*," Hillman says. "*Even if it seems like very little pain to you. Like, 'oh, that's so simple. Here's how to fix it.' It's awesome that you think that, but that's clearly not where they're coming from.*

"*Otherwise, they would have fixed it by now*."

But how does Sales Safari help you uncover people's problems? How does it help you to create products that will be used by more than just a few people?

Sales Safari works by observing "at scale." That means spending not just a few hours — but dozens to *hundreds* of hours analyzing your audience.

This, of course, implies that you've done the work beforehand to know where your audience or your customers hang out online. What forums, mailing lists, link-sharing sites do they frequent? What are they writing in customer support emails or product reviews?

Then, it's onto what Hoy says requires "close reading," a study technique that's meant to uncover layers of meaning in text. When you close read, you're focusing on the way the person writes, how they see the world, or how they argue a particular point.[9]

But we're not doing this for literary analysis. We're doing this to understand what people want.

And close reading, when used to understand an *audience*, uncovers a series of data points that will begin to form patterns.

"*You start collecting jargon, some of their specific detailed language and words they use to describe the problem*," Hillman says. "Elements and contributions to their worldview, their deep-seated beliefs that are unshakable. Then also the things that they talk about, they recommend. The things that they buy._"

Doing this can be overwhelming at first. It certainly was for me when I started studying designers as an audience. But what I found through Sales Safari led me to create both this book and two successful products.

And, to be honest, this is hard work. Hours will tick by. Probably days, actually. Pages upon pages of the Internet will be scoured. But it's work that the average person doesn't do. Because it's so easy to base a product idea on

[9] http://writingcenter.fas.harvard.edu/pages/how-do-close-reading

a handful of data points — a few coffee shop interviews, or what your friends and family think.

But Sales Safari's power is that it's a system designed to do two things: gather tons of data and help you analyze that data.

"*[People] get one data point or they get one potential client or customer, and they think, 'All right. This is it. I'm going to do [make this product].' That's really a recipe for failure,* Hoy says.

"*You need to keep doing whatever research you're doing until it all comes together. It'll seem fruitless up until the point where it immediately, like the clouds will part and a ray of sunshine will burst through. People like to go on one data point, because it doesn't take any work and because it feels right. It's bad, though. Bad idea.*"

Gathering tons of data points means that you'll start to notice patterns trickling into your notes. Eventually, you'll be able to categorize them: How does your audience see the world? What do they dwell on? How do they speak? What products do they use?

And, eventually, you'll start noticing the most important element of all: what your audience's problems are, written in their own words.

So, what happens when you're able to empathize with a set of people, create something that they want, and pitch it to them in their own words?

Sounds like you have an endless source of products ideas upon which to build.

As Hoy puts it, "The process is essentially figure out what hurts them. Reflect that back to them in a very empathetic, understanding way. And then offer them assistance."

And, applied over time, Sales Safari will help you track how your audience changes over time. Tastes evolve. Worries morph. New pains are uncovered.

It's really that simple, in theory — but only by actually putting it into practice will you and your product reap the benefits.

**Plot the Pain**

It can be difficult to sift through the heft of the raw data you gather during the course of Sales Safari research. Lots of your key insights will be tied up in text files or on sticky notes. There's a better way to visualize the data.

Enter the Pain Matrix. No, it's not a medieval torture device — it's a tool I invented to help me understand my own research data, and it can be a tool you use to help your team understand your customers better. This will help you zero in on your customer's pain, understand what makes them happy, and focus your product ideas.

(Figure 2-1) TO COME

Note these characteristics of the Pain Matrix:

* The horizontal axis, from left to right, is where you'll track your audience's pain. What do they mention, and how intense is it?
* The vertical axis, from bottom to top, represents the frequency of pain. How often did you find this pain mentioned in your data?

By plotting out your research in this matrix, the four quadrants will emerge:

* Upper right: frequently-occurring, intense pain. If a product can alleviate whatever is plaguing your audience in this quadrant, this is where you want to be to bring the most joy to your audience.
* Lower right: infrequent, yet intense pain. Products in this category might be nice-to-haves, surprising your audience if they were properly addressed.
* Upper left: little pinpricks of pain that occur often. Products in this category might address smaller problems like administrative challenges, things that people label "it is what it is," and provide a customer "little wins."
* Lower left: little pain happening infrequently. This is something that might appear like an opportunity while steeped in the details of your data, but reveals itself to be a low-opportunity product to build when stepping back to look at the bigger picture.

What tends to emerge is that the four quadrants start to fill up with very specific kinds of pain:

* Upper right: hate, fear, anxiety, feeling overwhelmed, feeling stupid, getting stuck, wasting precious time
* Lower right: procrastination, self-doubt, guilt
* Upper left: minor irritations, dislikes
* Lower left: boredom

Doing all of this work takes time, yes, but the results you get are absolutely indispensable. You'll have confidence that you can build something that you know people will want. You'll discover the fastest route to building the right solution. And you'll be immune to the idea of "failing fast" — because failing is no longer part of the product creation process.

**What Does a Product Designer Do?**

"*[A designer] takes pride in a skill based on experience and an alertness sometimes interpreted as vision. He approaches every problem with a willingness to do painstaking study and research and to perform exhaustive experimentation. He is equipped to work intelligently with the engineer, the architect, the physicist, the interior decorator, the colorist, and the doctor. He must know how far to go and when to stop. He must be part engineer, part businessman, part salesman, part public-relations man, artist, and almost, it seems at times, Indian chief. He operates on the theory that it is better to be right than to be original; therefore, he steers a course somewhere between daring and caution. If the merchandise doesn't sell, the designer has not accomplished his purpose.*"

Henry Dreyfuss, *Designing for People*

Barring any potentially politically incorrect characterizations in the preceding quotation, Dreyfuss might as well be talking about modern digital product design.

If we accept that a digital product's purpose is to serve a customer (and I hope that you can after all of the history we've explored together), then a product designer's primary job is to understand the audience they've chosen to serve.

Once that's in place, the product designer's job to craft the product that will best serve that audience — and, in the process, taking on a slew of intersecting roles required to get the right product across the finish line.

But it's so easy to get caught up in the echo chamber of the self-congratulatory technology community. Product design has, in some circles, become synonymous with the glossy, the beautiful, and the stylish.

Sales Safari helps us understand that a product has to be built with a customer in mind, and that a product has to follow through on its promise.

In other words, product designers aren't artists, nor are they solely focused on the aesthetic.

"What am I helping them do? What am I helping them achieve or feel or whatever it is?," Kyle Bragger, co-founder of photography site Exposure, describes. "For me, those two things are way bigger than, 'How does it look? What are the features? What is the aesthetic? What does the stack look like?'

Any of the other components of that don't really matter until you've figured out who you're building for and what it is that you're actually creating."

Everything else flows from audience and what they want. Including the visual. It's *always* in service to the customer.

This isn't meant to discount the value a so-called pretty experience. Aesthetics certainly have their place: they make a product appealing, more trustworthy, and more of a joy to use.

But we do a disservice to product design if we place too much emphasis on what's on the surface.

While it's constantly evolving, a product designer's role is an absorption of a number of disciplines into a single role that used to require separate positions.

Let's examine these merging roles now, and the characteristics they bring with them.

*Entrepreneur*: identifies needs in the market and finds ways to satisfy those needs. It can be an opportunity great or small, external or internal, obvious or nuanced. The person who's willing to take a risk and back it up with hard work, determination, and team building. For a product designer, this is typically demonstrated by being able to identify opportunities to better serve one's customer and imagining tangible solutions to carry out this vision. It includes the ability to create and share this product vision with other teams.

*Product Manager*: is, [in the words of technology veteran Josh Elman](https://medium.com/@joshelman/a-product-managers-job-63c09a43d0ec), helping "your team (and company) ship the right product to your users." While it's different in every company, a product manager builds a process to interpret ideas and feedback from all areas of the company — analytics, communications, trust & safety, support, operations, legal, international, and design (a technique at Twitter named "ACT SOLID"). This feedback also incorporates a deep understanding of the product's audience and the necessary research to achieve this understanding. The product manager then uses this feedback to decide the product priorities, driving the organization to build products in a timely manner that meet these goals.

Typically, the role of a product manager and a designer have been separate. Designers have been responsible for the so-called *solution space*, inventing solutions to solve the problem found by product managers. Product managers, in turn, have traditionally been responsible solely for the *problem space*, uncovering customers' desires and problems and making market projections.

These roles, though, can be difficult to separate. Product designers are not only expected to possess the skills of problem-finding product managers, but they're also expected to be able to implement the solution. Combining these skills in one person can dramatically decrease time-to-market, increase a team's coordination, and improve quality.

A product designer should now be able to talk with customers, understand their needs and goals, and understand the market enough to design innovative solutions. Instead of creating product specifications with the designed solution to follow, they are able to work through the actual product designs themselves and create solutions with a firm foot in reality.

But in larger companies, a product manager might be required to manage the sheer volume of organizational coordination and team-building. At Facebook, for example, product teams are comprised both of product managers *and* product designers. Both have overlapping skills, and if a product manager lacks a product designer on their team, [they're expected to pick up the slack](http://www.quora.com/What-does-a-Product-Manager-at-Facebook-do).

*Interaction Designer*: envisions how people will experience a product and brings to life refined, inspired experiences with the goal of leaving a lasting impression. Thinks in terms of user flows and creates mockups of the user interface. This is an individual that can internalize what a user might need at any given stage and fight for their satisfaction. For a product designer, this means having a strong ability to solve experience problems both within an existing visual system and with new, extensible patterns he creates. Product designers should also be able to document these new patterns for the team.

*Visual Designer*: creates beautiful concoctions of color, space, typography, iconography and illustration to help people navigate a product. Fluent in what comprises so-called "good design" across all types of media, including apps, websites, advertising, and more. For a product designer, this is

typically demonstrated by having strong visual design skills that are both original and aesthetically intuitive.

*Motion Designer*: understands how motion influences interaction design and uses it to reduce confusion, lend a helping hand, and make the experience fun. Collaborates heavily with visual and interaction designers and uses motion to create a product personality instantly recognizable and wholly your own. For a product designer, this is typically demonstrated by being able to identify well-constructed motion in other products or to invent their own original animations in prototyping tools or code.

*Prototyper*: using whatever tools are best for the job, a prototyper brings to life interactions or user flows to determine what's the best experience. This person could create a prototype with a variety of tools with varying degrees of fidelity, including HTML & CSS, JavaScript, Adobe AfterEffects, Quartz Composer & Origami, Framer.js, or actual code. For a product designer, this means being able to implement one's own interaction and user flows. The benefit of this is being able to test ideas quickly, proliferate those ideas, and zero in on the best solution for the desired experience.

*Data Analyst*: understands the challenges a product intends to solve, and provides data on product usage for informed decision making. Able to create and interpret A/B tests, synthesize large volumes of data, and makes sense of the trends. Knows how to set up tests and what user data to gather and when. For a product designer, this skill is typically demonstrated by a working knowledge of which data is significant to making a decision, understanding

the impact of design decisions through data, and identifying chokepoints where tests can be set up.

*User Researcher*: a champion of customers and an expert at gathering both their insights and feedback. Designs, executes and acts on ethnographic research and user experience evaluations to affect product strategy and product roadmaps. Helps the organization connect with the customer in a meaningful way. For a product designer, this skill is embodied by a deep understanding of the domain for which the product is being built. It's an individual who's able to translate what customers say into product vision, individual features, and marketing language.

*Psychologist*: knowing that we're all human and each subject to various influences, base instincts, and emotional draws, a user psychologist brings a larger human perspective to the task of creating enjoyable, emotionally-engaging experiences. Has a basic understanding of cognitive psychology, heuristics, empirical research, and empathy. For a product designer, this means being able to understand customer behaviors and the motivations behind them. It then provides the motivations to act on certain product features — creating habit-forming products by knowing what delights a human being in a particular context.

*Copywriter*: a person who's able to craft appealing, contextual, and easily-understood copy to a specific audience. They have an excellent vocabulary and exercise proper grammar. For a product designer, this means balancing clarity with the personality of the product being built. It also means fighting for properly-formed sentences.

*Project Manager*: has the responsibility of driving a project to meet its stated goals. It requires balancing the four pillars of the project management superfecta: time, cost, quality, and scope. For a product designer, this is an essential part of the role and a constant dance between engineering and the needs of the business. What features are essential? What are nice-to-haves? What if *everything* seems essential — how do you choose what to trade to meet a deadline? Product designers must have the skills to navigate these muddying questions and deliver a satisfying product.

*Product Marketer*: is responsible for being the link between the product and its intended audience. This can include internal groups like sales or public relations, as well as clients, customers, and partners. They help the product organization understand what should be built and keeps track of how customers and the market as a whole react to new product launches. Before the product is built, product marketers will perform market research to help determine where new product development should head. After the product is built, they take care of launch marketing and all relevant materials required to sell it. A product designer embodies this role when they work with marketing to make sure that the product's promise matches with the public story. They'll determine what the release plan should be, and works with engineering through the launch process to fix problems and communicate what's happening with both the organization and the outside world.

*Customer Support Representative and Community Manager*: these are the people on the front lines, who regularly take the brunt of problems when things go wrong. And in the rare event of praise, they identify the parts of a

product that are doing its job. They're advocates for customers having problems, and exude the product's and the brand's promise through their interactions. A product designer knows how to identify and categorize this messy feedback, from catastrophic to nice-to-haves. They'll be a bridge between Support and Engineering, and might even be a fixture in the community, serving as a nexus for their customer's candid feedback.

These have traditionally each been separate roles in an organization. Many of them still are, and many will continue to be for some time. But they each have a role in the toolset of a product designer.

It's obviously impossible, though, for a product designer to be an expert in every one of these fields. The role lives at the nexus of all of them. Implementing a product requires knowledge and practice of each of these disciplines.

Typically, though, a person in this role tends to specialize in a set of these skills. It happens to product designers much like it happens to characters in role-playing games, or RPGs. RPGs typically start new games by requiring players to build custom characters. Players are asked to choose from the start to choose characters specializing in a particular "class" of skills, such as a bounty hunter, a hacker, or a soldier. Each class specialization brings Over the course of the game's storyline, the player is given the opportunity to "level up" their skills, and can choose to either be a well-rounded character or one that has deep experience in a few particular skills.

Just because the words "product designer" may not be in your job title doesn't mean that it's not your role. Titles like "Product Manager & Lead Designer," "Product Owner" or even the classic "Product Manager" might require you to employ product design-like thinking and skills.

But it all goes back to serving the customer. That's why a product exists.

So how do you sift through the research you've gathered? How do you know where to point your product?

Let's take a look at the Pain Matrix, a tool I invented for analyzing my own research data.

**Shareable Notes**

* Product design is a process that starts and ends with completely understanding your audience. This takes painstaking firsthand research *before* you even start building a product.
* Sales Safari is a modern approach to ethnography. It's the process of choosing an audience, seeing where they hang out online, and lurking in these communities to analyze their wants and needs.
* You can use the Pain Matrix to make sense of your original research by plotting your data.
* A product designer is a role that exists at the nexus of a slew of skills: anthropologist, product manager, copywriter, interaction designer, and more. It's a reflection of how important technology has become to our culture.

**Do This Now**

If you accept that product design starts and ends with an intimate understanding of how you can serve a customer, then identify the following:

* Who is the customer for which your product exists?
* Where do these people congregate online?
* What do you understand about them? What can you learn about them by reading their forum posts, App Store reviews, or support emails?
* Plot their pains on the Pain Matrix. Compare it to the problems your product is currently tackling. How do they match up? What has your product been missing?

**Interview: Amy Hoy & Alex Hillman**

*Amy Hoy and Alex Hillman are the co-creators of the 30x500 Bootcamp, a course that teaches students how to sell products that people want to buy. At the core of the course is a technique Hoy invented called "Sales Safari," a process rooted in ethnographic observation. 30x500 students have grossed $2 million in product sales within the past two years.*[10]

Scott: What is 30x500? And what is Sales Safari?

Amy: So 30x500 is Alex and my class for creative people. They can learn to create and sell their first products, because working and doing creative stuff for somebody else for hire, it's very different than selling directly. You're insulated from the market realities. You don't understand quite what people want, except your boss.

[10] *http://courses.30x500.com*

It's very difficult to go from school and job and then freelance to create a product. A lot of people fail, because they don't understand how different it is. So our class gives them those skills that they can go and launch something and make money.

Alex: And Sales Safari really started as just one of the components of that class. When we first set out to create it, and the first version was actually called "the Year of Hustle."

What was interesting when we started teaching that version of the class, which is everything leading up to launch, a bunch of the components of that were...we didn't think they were all that high level, but we learned over time just through teaching that things like "take notes" and "go do research on your audience" aren't really specific enough.

So Sales Safari's really become the heart of the 30x500 class. Arguably, the majority of the lessons themselves, the exercises are tied directly to it, when originally, it was just one step of many.

Amy: I don't know if it was so much one step of many as that we would say things like "go study," "go read what your audience is writing, study it and make notes. And use that." People don't understand how to go study, read or make notes.

A lot of college educated people, none of that makes sense at all.

Alex: It's step-by-step. Every component is a "here's not just what to do," but specifically how to do it. Here's the results that you get. And here's to know whether or not you're doing it right, because you're going to use those results in the next component. Things like that.

Amy: What is really is, Sales Safari is "net ethnography," combined with some close reading and empathy. Like step by step empathizing with your customer to understand them.

Alex: Also sort of a built in feedback loop. Once you start applying those Sales Safari data, you're collecting categories of notes, things like the pain that you notice in people. Not just the pains, like what the problem is, but also how they describe it.

You start collecting jargon, some of their specific detailed language and words they use to describe the problem. Elements and contributions to their worldview, their deep-seated beliefs that are unshakable. Then also the things that they talk about, they recommend. The things that they buy.

All these things where the individual data points can be valuable, but the goal of Sales Safari is to have a systematic and repeatable approach, so you can collect a ton of it. A ton of data, because without a ton of data, you can't find the patterns. Without patterns, you can't make smart decisions about the business.

Amy: Yeah, people who go and they, especially designers, developers, writers, they think, "I'm going to make a product." They get one data point

or they get one potential client or customer, and they think, "All right. This is it. I'm going to do it." That's really a recipe for failure.

You need to keep doing whatever research you're doing until it all comes together. It'll seem fruitless up until the point where it immediately, like the clouds will part and a ray of sunshine will burst through. Where it will change [inaudible 00:05:07] thing and they'll go, "Of course, this is what I should be doing."

People like to go on one data point, because it doesn't take any work and because it feels right. It's bad, though. Bad idea.

Scott: What was the impetus behind doing this? What led you on this path to now?

Amy: It started when I was very young. I read like every book in the library when I was a kid. I read everything. One of the books that really made a difference in my life was "People Watching" by Desmond Morris. And then his related books, like "Baby Watching" and "Pack Watching." That gave me very, very early on the idea that you can understand people and creatures by observing them.

So, thanks, Desmond Morris!

And later on I learned about ethnography, which is, of course, what Desmond Morris was doing. Then just later on when I started doing freelance and business and stuff, it just made sense for me to focus on what

were people doing and how can I get in front of them? So Sales Safari, it's something that I've been doing sort of naturally since I was a teenager. Then I started trying to teach it to my friends, because as someone who is really well-connected in the Ruby on Rails and Peachtree worlds, I just watched my friends fail and fail and fail.

I'm like, "Um, you don't need to be failing."

When we launched, my husband and I launched Freckle, a software as a service in 2008. Software as a service grows really slowly in terms of revenue. In 2010, I decided I had to quit consulting, because it was making me want to murder everyone. So like how can I make some money? We had shipped JavaScript workshops, which is like 50 grand at that point.

I decided that one of the most valuable things I could teach was the business stuff. Because we launched workshops. We'd launched e-books. We've launched software as a service, which was growing nicely. It's just slow. I sold so many big consulting contracts to difficult clients and got them to do what I wanted. I clearly had a skill that people lacked and I wanted to share it with them.

That was the very first Year of Hustle. I was like, "Hey, Alex. You want to help me?" Because I knew Alex has a lot of the most important worldviews in common.

Alex: My background...Amy and I had some similarities in the fact that we've done the employment track. We've done the freelancing consultant track.

Amy: And then we did the impossible.

[laughter]

Amy: Separately.

Alex: As it were. What's interesting is...or it's two things. One was Amy and I were friends for a number of years before we started working together, so this was not a business partnership forged out of necessity.

It was more of a "Hey, we do have a common interest and a common set of skills in terms of being able to connect with an audience and help them do something that's important to them." That's what made us successful as both employees and freelancers, honestly. The thing that was always my angle as a freelancer was when everyone was out there selling their code, I was actually getting to know the business that I was trying to serve and say, "Here's what I think will actually make the work you're about to pay me to do pay for itself in a multiple." And wrote it. Nobody does that.

Amy: It's partially nobody does it, because they just think like a cog at all times. But also I found one of the basic reasons I hated consulting was the clients really don't...I mean, they say they want that, but they don't really.

They ignore you. They hire you and they pay you, but then they ignore what you say.

Alex: The move to Amy and I working together on this came from the same frustration of both having created successful businesses beyond our freelance. Amy had been able to launch Freckle. It was young, growing at the time.

I had Indy Hall. Also young and growing at the time. And saying, "How is it that we've created these things and seemed to have dodged all of these bullets that take so many other people out. What can we share from what we have learned to help people avoid the failure rather than just lean into it and accept it and say that these lessons are necessary battle scars in order to be successful? That's ridiculous.

Amy: Yeah. We share our idea that some X can't be taught, whatever it is. X can't be taught. It's done by people who are crappy teachers.

Alex: Amen.

Amy: Alex, you didn't explain what Indy Hall was to the [readers].

Alex: Sure. Indy Hall is a coworking community and space. We're one of the first in the world, which puts me in a distinct position to say that there legitimately were not people doing what we did when we started. I had to learn a lot from outside influences and things like that to figure out how to make Indy Hall work.

For those of you who know about coworking and maybe have visited a coworking space, one thing that I'll urge you to do next time you set foot in a coworking space is look for one thing in particular and that's whether or not people in that coworking space are actually interacting with each other. Are they talking to each other? Do they walk up and say "hello" to their neighbors and things like that? Or do they walk in. The drop down their computer and they put in their headphones and not talk to anybody?

One of the things that sets Indy Hall apart and the thing that I think we work the hardest at since the very beginning is we're not so much a place to work, although absolutely, I think one of the best places to work, we're a place to meet people who you wouldn't otherwise meet. Really a community more than anything else. More of a club and a clubhouse.

And eight years later, we're still growing strong and evolving and doing all sorts of things. But the interesting thing about my experience in building Indy Hall and community building is the practice that we both do at Indy Hall and we teach other coworking spaces and things like that.

It's got a lot in common with Sales Safari. That's not something that I talk about a whole lot. But its a lot of the same components of observation at scale, pattern watching, close listening, building empathy, and then, I guess, the part that's a little bit different from 30x500 in many ways and a lot of the businesses that 30x500 helped people create is when you create a product business, generally speaking your customers are not aware of each other. They're not super aware of each other.

They may be aware of them from testimonials or they may bump into each other. Even if you've got a mailing list or something, a discussion list or support forum or things like that, but Indy Hall's this kind of bizarre business where the customers are extremely aware of each other to the point where the majority of the value that you get as a paying member of Indy Hall is actually coming from other members.

Which means as a business owner, my senses for listening and understanding people where they actually are needs to be very, very good. Otherwise, we react to what we hear versus what we see and make bad decisions that a lot of other shared work spaces do.

Amy: What Alex didn't say is that Indy Hall and there's where Alex is sort of like the "godfather" of coworking communities, because so many of them have made the same stupid mistakes and then had to shut down because they didn't serve and focus on their customers first. They instead focused on the extraneous baubles, like fancy desks and a fancy space.

Then they were like, "Well, how do I fill this space?" Which if you spend any time in entrepreneur forums, you know people make things. They're like, "Well, how do I get people to buy it?" It's the same thing.

The same problem people have in Indy Hall. Alex did it the opposite way, which is why he and I are such a natural fit.

Alex: If you think about starting a business with venture capital or really any stage of funding before there's money coming from customers, what happens is you set a scale. You pre-dictate a scale that the business needs to be in order to be successful. You have more venture capital, you take on at really even a "favorable" rate or valuation, that transaction dictates a necessity for growth. That's what people say makes a startup a startup.

But it changes the kind of decisions that you make and who you serve. Instead of serving the customers, you serve the size of the container that you created for that business to continue to fill and do by hook or by crook. Unfortunately too many people lean towards crook in order to make it work or you fail.

And so many businesses fail at a totally reasonable profitable scale, because they never are able to hit that imaginary bounding box.

Amy: They're over-leveraged from day one.

Alex: If you look at a coworking space as a physical manifestation of the exact same thing. If you start with a 20,000 square foot space, now having to have memberships to support a 20,000 square foot space and then some before you can ever consider yourself successful.

We take the inverse approach and teach the inverse approach, which is have members before you even have the overhead of a space. Let the membership and its growth and its needs and its way of supporting each other dictate the

size and other attributes that are far more important than the size of the space itself.

Scott: How did you apply the rough principles of Sales Safari to building an offline business?

Alex: For my short answer, and then I'll want to hand it over to Amy, is that not much changes with the exception that everything slows down. You lose a bunch of really valuable tools, like "search" and "copy/paste." You rely on your ears and your brain.

The one thing that I tuned that...I mean, this is expert level Safari in so many ways, is the ability to disassociate what someone is saying from what you interpret them saying. And remember what they actually said, not what you think they said.

That's something that's much easier to do online when it's written, because you can literally copy and paste what they said. When you're talking to people, man is that hard.

So you're at a bunch of disadvantages to try and do this offline and it's slow. But I'm curious what Amy has to say about this.

Amy: The other issue, we don't need to invent in person Safari, because ethnography and whatnot have already been invented. Safari was my invention to take those into Internet form.

When you're in person, it can be also...most people cannot observe while they're engaging. It's very difficult. Not only difficult to disassociate, but literally, you have to have two parallel running processes in your brain, and they both have to be working at full speed. Very few people can do that. I think even with training, very few people can do that.

Two, if you're in a local user group, for example, and you're like, "Oh, they get these people that have these problems." And this user group, assuming even that's accurate, you then think that, "Well, they all must be this way across the entire world. All the different user groups, every "Rubyist" must have this problem.

That could be so untrue. You have a local maximum in a lot of ways. Like literally local and you might have just reached the peak of what's local and it may not be anywhere else the same.

Alex: Which isn't inherently a bad thing, but it's a limitation you need to be really, really aware of.

Amy: Right. When you're serving an actually local market, which is what [inaudible 00:19:02] does, it works so much better, because it doesn't really matter if people in Tucson, Arizona have the same concerns about working alone as a freelancer, because they're not going to join Indy Hall.

If you serve a local market, then local Safari is the absolute best thing you can do.

But on the other hand, people then take that kind of thing, if I say that kind of thing, then they think, "Oh, I'm going to go to my salon and see what struggles they have." But that doesn't show you the full picture.

I cannot tell you how many friends and early on students before we learned to discourage them, went and said, "All right. Well, my local bar, restaurant, salon has this stacked scheduling problem. I'm going to make software for it." They think they identified a problem that they were going to solve, but they didn't understand salons at all. They watch them misuse pieces of paper to do this rough scheduling, but they didn't understand that these people never buy software, ever. If they bought software, they wouldn't have this problem to start with.

We have seen staff scheduling issue for local businesses come up four or five times over the past few years. It's always a failure, because you can observe someone doing a task and not understand the bigger context. And the way that you understand a greater context is long term observation, like many different intervals.

Alex: Then the other part to that is if you ask them to show how they use it, you're instantly at a disadvantage, because they know you're watching over their shoulder. That instantly creates changes, even if they're micro-changes in how they use it, because they're trying to show you something, instead of doing what they normally do in order for you to observe.

There's an element to Sales Safari where there's a very intentional distance and a lack of participation. People need to not know that you're there

watching. That sounds really creepy to say it that way, but the reason for it. This is professional lurking if you want to look at it that way. You're there to watch what they do and say when they don't know that you're there.

Amy: It's not that they're doing it in private. It's a public forum and mailing list and such, but they aren't performing for you.

Alex: Exactly. It's what do they say unprompted?

Amy: In ethnography, I consider this a Margaret Mead problem, right? Margaret Mead was this famous anthropologist who screwed up big time, because she went to these remote villages and she asked the villagers, and especially the teenaged girls what their lives were like. And then she came back with these insanely sensationalized tales of crazy sex lives and everything. They were just totally putting her on.

It wasn't true. In people studying circles, Margaret Mead is a cautionary tale. In fact, she's probably the cautionary tale, because she took the word of her subjects instead of observing what actually went on. Very gullible. And you don't want to become a martyr.

Scott: So why do, in your experience, why do people misrepresent or sometimes lie or sometimes just say something to get you off their back? Why is it that asking people isn't reliable?

Amy: I don't think it's usually...I think it's rarely on purpose. I think it's rarely on purpose. People don't understand what they do all day. They don't

pay attention to what they do all day. As a designer, I can tell you. It's just absolutely fact, because if I explain all these problems with enough software people, like, "Oh, but it's not so bad! Oh, that's just email or whatever."

I'm like, "Well, what about if it looked like this?" They're like, "Oh, I never thought of that. I never thought that maybe I should have a people view that will show the files Bob sent me, so I don't have to search for 'Bob.' And then click every email with that."

Alex: To Amy's point, there's a numbness to some pains. But the other side of it is, it's people really ultimately train themselves to not think about it or to think about it in a certain and specific way. Or they've heard a certain thing that they think they're supposed to say.

Again, it's not an intentional act of deception. That's extremely rare. It's more that you're relying on them to be reliable. That's statistically, that's not going to be the case.

They're not aware. If they were so aware of their problem, there's a good chance the problem would be solved by now.

Amy: That's why every programmer makes their own tools, and they're all terrible. I'm a programmer. You all know what I'm talking about.

The other thing. If there's research that shows this, experts don't understand how they do what they do. They can't verbalize it.

When you start observing it, they start trying to explain it while they do it. Their performance worsens a lot.

Scott: I also remember the example you gave in a talk a while ago of the Walkman focus group.

Amy: Oh, yeah.

Scott: Where they said, "We want yellow." And then they all picked up black.

Amy: Yeah. All the kids were asked by Sony, "Which one is cooler? Which one would you want to buy? The cool sporty yellow Walkman — I think it was Discman — or the black one?" And then they were like, "Thanks for doing our focus group. Here's two tables worth of Walkmen. Pick the one you want." And they almost all picked black.

People's vision of themselves is different than how they actually are. That's humanity for you.

Alex: And also, this is something I've learned through Indy Hall is that people rarely -- this is bizarre -- people so rarely act in their own best interest. It's really bizarre.

It's not that they are intentionally self-sabotaging. It's that if there are habits at play, that they generally aren't aware of that habit. They will simply revert to the habit.

The example I can give you is that people choose to work in a coworking space generally because they don't want to be by themselves. Otherwise, they could stay at home, right?

Yet so often, given the opportunity, if they come into a coworking space, the first place that they will choose to sit is by themselves. I like to think of it, it's like when you get into an elevator by yourself, you stand in the center. The second another person walks in the elevator, you both go the opposite corners.

It's a personal bubble thing or I'm used to sitting by myself, so I think I'm going to sit by myself.

It takes an outside influence, which in the case of a coworking space is me and my team, doing choice architecture and design to help our members, our paying customers get what they actually came there to get. Because if they are left to their own devices, often they won't.

Scott: That's fascinating. Do you find that peer pressure plays a role as well? Is it like a so-called societal norm in the context of where they're at? Or is it just, "Hey, I'm awkward being social, but yeah, I want to be. I don't want to be by myself."

Alex: I think it depends. I'll say all this. There's not a right or a wrong way to work in coworking space.

You work however you're most productive. But what we know is the people who get the most value generally do a handful of certain things. That comes from observation.

If we can help people choose those things for themselves, that's one of the other elements that we teach in Sales Safari. One of the Sales Safari derivatives is our copy writing techniques, which are designed to be persuasive. It's not about getting somebody to do something they wouldn't already do.

Amy: No, never.

Alex: It's getting them to make a choice that is in their best interest. If it's not in their best interest, it doesn't work.

That's the beautiful thing about it. It's not persuasion for the sake of getting people to do something detrimental. You can't plant a seed in someone's...you can't plant an idea in someone's head and simply have them do something that is against their best interest. If you can, it's evil. But that's not what we're setting out to do.

Amy: But most people aren't that good.

Alex: Yes. That's just it. You have to be very, very good at it.

Amy: Really, really hard.

Alex: In order for that to be effective. And most people just aren't that good.

Amy: Thank God.

Alex: Master manipulators.

Alex: It's true. But it comes down to, when you think about sales and copy writing, writing persuasively, even if it's not a sale in terms of money changing hands, but getting somebody to do something. Writing an email that people will read. Writing a blog headline that will get somebody to read the rest of the article, you have to think about why reading the article is in that person's best interest. And then show that to them.

Because they're not going to do it on their own.

Amy: It's this idea that people walk around looking for solutions to their problems. No. People walk around trying to tune out their problems, because they don't expect that they can solve them. You have to reflect back to them. "Hey, this is the problem that you're having. You know, it's a big deal, but also we can fix it together."

That is the heart of my copywriting technique.

Scott: That's a good segue. What's the process that helps you understand what would make someone read that email, use this product, read that blog post?

Amy: The key is you start by observing what they actually already do. You don't try to persuade a vegetarian to buy Omaha Steaks. You look at what they actually do in real life on the Internet. What they read. What they share with each other. The problems they discuss. What things that they ask help for. How they help others.

And then you get in there with something that already fits their behavior and their worldview. If people don't watch videos or they exclusively watch videos or you find they pay more for videos, then you'll want to consider giving them videos.

The process is essentially figure out what hurts them. Reflect that back to them in a very empathetic, understanding way. And then offer them assistance.

So you don't say, "Hey, I can help you with that!" Say, "What if you didn't have to restart Skype five times during your podcast?"

Scott: That would help.

Amy: Great. Yeah. Or just the little tool we started using the other day called "Line In." So you can actually hear yourself on your own monitor while you're recording stuff.

Scott: Oh, imagine that.

Amy: Yeah. It's like you have to start recording and then stop recording and then reopen it and listen to it, what you just recorded, to be sure that everything's correct. Why do you have to take all these steps?

So what if you didn't have to take all these steps? What if you could do it simultaneously? Hey, here's the app!

Alex: By the way, it was incredibly hard to find the solution to that problem. I was someone who was looking for it. This is a great illustration of what Amy was talking about before. I knew the problem that I had. I knew that I wanted to solve it.

What I didn't know was how to describe in the way that the person who had created it was marketing the product was describing it.

Amy: They didn't do as good a job as I did just right now.

Alex: Right, exactly. If they had, I would have typed a couple things into Google and boom! They would have popped right up. There's a natural SEO to this as well. If I'm trying to guess what way would a product maker describe their product in order to find it, you're making me do double the work. That's why I'm never going to find you.

Versus let me type in the problem that I have in the way that I would already describe it, and poof! There you are.

Scott: What I love about Sales Safari is that it takes advantage of the fact that we're now at a time where all this stuff takes place online for the most part. There are some communities that don't hang out in forums or link sharing sites or Reddit or whatever, but it takes advantage of the fact that, hey, by and large, the vocal members of some community are talking about the problems they have.

Alex: This is the thing to put all of that in perspective. I think you're totally right. Is that in order for someone to go on the Internet and ask a question of a group of strangers about how to solve their problem is a very strong indicator of the level of pain they're in. Even if it seems like very little pain to you. Like, "Oh, that's so simple. Here's how to fix it." It's awesome that you think that, but that's clearly not where they're coming from.

Otherwise, they would have fixed it by now.

So keep that in mind, that in order for people to post a problem they're having for help to an Internet of strangers, that's a clue right there.

Amy: Huge clue. Yeah.

For example, my husband Thomas is like a lot of people. He just kind of goes along. Like, "Why are you hanging socks on the drying rack this way?

If you hang them this way, they'll dry faster." He's like, "I've been hanging socks this way for 30 years. I don't care."

So you can't really help Thomas, no matter how much he needs the help in these areas, things he doesn't care about. But if he were on a forum asking how to maximize his hang dry time, then you would know it was time to sell him one of those crazy octopus hanger things that they sell in places where they don't have dryers.

That was a weird example.

Scott: No. Sock drying is a perfectly legit example.

Amy: The struggle is real.

Interviewer: I'd love to hear what your thoughts are on the so-called Lean Startup mentality, that's been permeating startups everywhere. It's something that people kind of take it as blind faith these days. Any thoughts on that?

Alex: I think it's important to think about the Lean Startup, before we even get into what it is and why it doesn't work, talk about the problem it tries to solve. Right? The problem it tries to solve in theory is not very different from the problem we're trying to solve, which is ship something that people actually value.

And to avoid wasting time and effort and money and other finite resources on getting there...It's advice being given at the level where you're just tweaking an already broken decision. An already broken system.

Where the Lean Startup really leads with the genius idea that came from inside of you, and says, "Here's how you will take my Lean Startup magic fairy wand and if you tap it on the right people's shoulders in the right direction, you'll magically make a sale."

Scott: That was beautiful.

Alex: You like that?

[laughter]

Amy: Please say "fairy wand" again!

Alex: Fairy wand.

[laughter]

Alex: But that's how I've been describing 30x500 as the antidote to that feeling of tapping people on the shoulder with your "do you want this wand?"

[laughter]

Alex: It's getting weirder, isn't it?

And avoiding that entirely. So Amy, do you want to pick up and run from there? How's that for a set up, by the way?

Amy: Basically, Lean Startup is Cinderella. Cinderella is going to keep scrubbing different stoves until someone comes and nominates her to be a magical princess.

Alex: It's not that Lean Startup can't work. It's that it works on...it's like, what's the term in programming? Eventual consistency. Lean Startup can work given an infinite amount of resources and time to maybe finally make a match.

Amy: Okay. A thousand monkeys typewriters Shakespeare.

Alex: Right.

Amy: Well, I think the key is "garbage in, garbage out." If you have something that's already fundamentally good, then lean startup can help, because you're just refining what's already good. But most people don't have something that's already fundamentally sound to start with.

Alex: There is no way for them to know whether or not they do.

Amy: Correct.

Alex: Lean doesn't teach you that.

Amy: Throw stuff at the wall until something sticks, which is basically the lean startup approach. With lean, if you actually read the book "Lean Startup," it's really vague.

It doesn't actually tell you, "Do this, do this, do this." It's more of a pastiche, which is fine. People act as if it's a set of instructions, which it's not, which leads to all the confusion and difference in opinion that you find people infighting about all the time in the Lean forums.

The think about Lean Startup is that it's inspired by the Toyota way and lean manufacturing, which is very clear. Some of the best parts of the book are the quotes from the Toyota way.

No one starts an assembly line like, "Well, let's see what comes out the end. If we don't like it, we'll change it."

Which is what Lean Startup does. It's like, "We're going to make something. If it doesn't work, we'll change it." That's not how anyone makes cars and that's not how anyone ever made cars. By the time they get to lean manufacturing, the what is a known quantity. An established function. Then you just improve the manufacturing itself.

I'm not actually sure how the Lean Startup came about. It doesn't logic out to me, if "logic" can be a verb.

Scott: It is now.

Amy: Whereas we are like, "What makes something people want to buy?" And then what do people want to buy? Because you cannot make something people want without understanding what people want or being very lucky. Luck is not a business plan.

Alex: It's not that that's not how it happens. It's unlikely that you can recreate that.

Here's the thing. There's a fundamental difference between the business that's willing to run around with hopefulness, that Cinderella story that we're talking about before, and predictable, repeatable results.

Predictable, repeatable results means you can work with consistency. It means that you can work on a schedule. If you've got limited time. You're trying to do this on the side or you've got health issues or you've got kids and a family. And you don't want to give things up. The lean approach, again, it will swell to fill the amount of time and resources you give it. You can keep doing it into infinity.

Whereas with consistent repeatable results, you can do it with finite amounts of time and know that you'll get there.

It's a beautiful thing, because it actually scales, also. Is you know that when you do it and it works, you can keep doing it. You can do it more and get

better at it. You can put more in and get more out. It's an actual process versus this very vague, fuzzy, open to interpretation thing that is lean.

Scott: What made you build Sales Safari on the pains and not the joys that people mention?

Amy: Because joy is much more personal and also a lot of cultural groups, and I don't mean like ethnic or country cultures, but industry cultures don't talk about what's awesome. Or, if they do, it's sort of disingenuous, how everything's awesome.

30x500 focuses on providing business value. And business value always comes from something that is a waste to start with or a lack.

So, Freckle Time Tracking, my app, may create pockets of joy, which I think is awesome. But the most important thing that it does is serve a business need while not being terrible. Freckle is actually very pleasant to use, but just saying it's actually fun to use...I mean, you could apply that to anything. It would be meaningless.

This thing, it's time tracking that you'll actually use because it's pleasurable. That time tracking is the key part here, if that makes sense.

There was this scene in this book called *Good Omens* by Terry Pratchett and Neil Gaiman. Have you read it?

Scott: I have not, but it's on my Amazon wish list.

Amy: It's really good. You should read it now! It's fantastic.

One of the main characters is Demon Crowley. He's sort of gone native in the world. He wants to be human, basically, and live as human. The demon's job is to create evil, right? They have this demon meeting. Demon middle management affair.

And these other demons are like, "I can get a priest to commit blah, blah, blah." And "I tempted a man to kick his dog." Blah, blah, blah. And Crowley's like, "Well, you guys are not thinking big enough. Those are individual acts that lead to strong acts of evil, but what I did was I invented the M-25 motorway. And people drive around it and curse it. Thousands of them every single day."

It's especially funny, because British highways are terrible.

But the idea that looks like the low level accretion of evil, thousands of times a day, I like to try to create the opposite. Think how many horrible hours each day are burned using Microsoft Word.

Or enterprise contracting software. The thing is, if you just say, "I'm going to create joy," you'd be like, "Here's a cup of ice cream!" Doesn't actually tell you where to go. People like kitties. They like kitties. They like ice cream. They like jazz music, but those are harder things to sell unless they're in the need for them.

Whereas if you say, "You struggle with this problem every day. Imagine if it was actually positive interaction instead?" Then you actually get people listening, so that they're in the mood for ice cream, they're not going to buy ice cream. If you can't stimulate demand for it easily, but if you work with something that they're suffering with, then you have a conversation opener.

Scott: I love that characterization. You have to be in the mood for these things. I've never heard it put like that before. I think that's really powerful.

Amy: Stimulating demand is difficult. It can be difficult.

Alex: This all comes back to, just to sort of round out Amy's point, it's very easy and also ineffective to spend a lot of time trying to convince somebody else that they want something versus meeting somebody where they are in the moment where they want it.

Not only are you able to serve them, but they get this feeling of "magic mind reading-ness," which is complicated concatenation of words. The idea being not only are you able to solve their problem, but they get this feeling, in addition to the joy of having their problem solved, think about that elation that you feel when it's like, "Finally, somebody gets me. Gets my problem. And by the way, found a way to solve it."

And even if it's not perfect, even if it's got shortcomings, which by the way, it will. It always does. That doesn't matter, because they feel "felt." They feel like you get them, which instantly instills some trust, which adds to their willingness and likelihood of buying. People buy...that's another factor in the

30x500 process is the difference between selling to clients as a freelancer or even selling yourself to an employer where you've only got to convince one person is you can get to know them and figure out what you need to tell them in order to get them to hire you or give you a raise.

When you're selling products, you're not allowed to be in the room for every sale. So you need new mechanisms for building trust.

And meeting people where they are, helping them genuinely through e-bombs and then through a pitch that says, "I get you. I get your problem. This is your problem, right?" "Yeah, that is my problem. You've described it the way I described it. Are you reading my mind?"

And then you show them how things could be better. They're like, "Yeah, that's actually what I want. That ratchets up the trust. They believe that you get them.

Amy: Because you do.

Alex: Because you do.

Of course, this only works if you actually follow through. Amy likes to talk about...we study infomercials and show our students infomercials. The reason that people hate infomercials is because they sell junk.

It doesn't deliver on the promise. If they worked, we wouldn't hate them so much.

So getting the customer's trust, that you actually know what problem they have delivers so much. Then when you do actually fix the problem, that's sort of like a cherry on top of the trust sundae, since today's been full of metaphors. Then you've also got a customer who's not only happy, but wants to talk about you and your product and how much your product is awesome.

Not because your product is awesome as your product helped make them awesome. The product solved their problem.

A customer whose problem is solved is going to talk about the fact that they're problem is solved and you get to go along for the ride.

O'REILLY®

# Mapping Experiences

## ALIGNING FOR VALUE

James Kalbach

# 3

# Visualizing Strategic Insight

In This Chapter:

- A new way of seeing
- Reframing competition, creating shared value
- Reimagining value delivery, organizing for innovation
- Visualizing strategy

"You've got to start with the customer experience and work backwards to the technology" – Steve Jobs

A number of years ago, I facilitated a multi-day strategy workshop at the company I was working for. During dinner the director of sales explained his perspective on the workshop's purpose: "We have to figure out how to get customers for all they are worth." He gestured as if wringing a towel. "If the towels gets dry, you have to squeeze harder. A good leader knows how to do that, and a good strategy makes it easier."

He was serious. I was horrified. Our markets are not people "out there" we shake down for loose change. Customers are our most valuable assets, I thought. We should strive to learn from them so that we can provide better products and services.

The director's perspective was shortsighted. He believed the business of our business was more sales. That may be fine in the short term, but ultimately this narrow perspective leads to failure. Organizations looking for sustained success need to break this mold.

Companies frequently don't realize that as the business grows, it must also widen its strategic field of vision. I call this misstep *strategy myopia*. It happens time and time again: organizations ultimately don't know what business they are really in.

Take Kodak. The film giant dominated film market for over a century, but filed for bankruptcy in 2012. Many people believe that Kodak failed because it missed digital camera technology. This is not true. In fact, Kodak invented the first digital camera in 1975.

Kodak failed because it had the myopic view it was in the *film* business instead of the *storytelling* business. Leaders feared digital technology would cannibalize profits. They believed they could protect their existing business through marketing and sales. It was a nearsightedness in strategy, not technology, that led to Kodak's downfall.

Successful organizations continually innovate and expand their horizons. Incremental improvements are not enough. Technical R&D is not enough. Instead, they must grow by questioning the type and scope of value they create.

Diagrams of experiences offer a type of insight is often overlooked in strategy creation: a view from the individual's perspective. This chapter shows how mapping experiences can contribute missing strategic insight and ultimately serve as a corrective lens for strategy myopia.

The chapter concludes with a review of some complementary techniques that extend experience mapping to better visualize strategy. By the end of the chapter you should get a sense how diagrams broaden your field of vision.

# A New Way of Seeing

The context of business has changed over the last few decades. Consumers are have real power: they have access to prices, product information, and alternative providers around the world. Traditional approaches to sales—wringing a market for what it's worth—do not work anymore for sustained growth.

Instead, organizations need to reverse their thinking. Renowned business leader Ram Charan, for one, urges companies invert the traditional sales perspective. In his book *What The Customer Wants You To Know*, he illustrates flow of value insight opposite to traditional approaches (FIGURE 3-1).

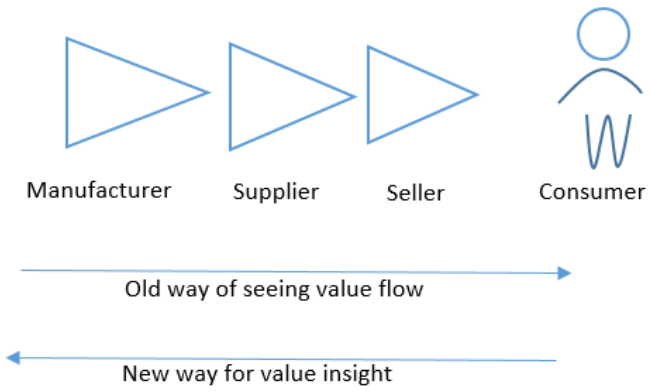


*FIGURE 3-1: Understanding value from the consumer's perspective reverses the flow of insight.*

Insight about users is not a nuisance, it's a strategic opportunity. The objective is not a *push*, it's a *pull*. You don't sell products, you buy customers.

This idea runs contrary to typical strategic decision making, but it is not new. As earlier as 1960 renowned Harvard business professor Theodore Levitt discusses the importance of focusing on human needs first. In his influential article *Marking Myopia*[*] Levitt writes:

[*] Many of the themes and ideas in this chapter were directly derived from Levitt's landmark article, including the term *strategy myopia*. This article is still relevant and highly recommended. See: Theodore Levitt. "Marketing Myopia," *Harvard Business Review* (1960)

> An industry begins with the customer and his needs, not with a patent, a raw material, or a selling skill. Given the customer's needs, the industry develops backwards, first concerning itself with the physical delivery of customer satisfaction. Then it moves back further to creating the things by which these satisfactions are in part achieved. How these materials are created is a matter of indifference to the customer, hence the particular form of manufacturing, processing, or what-have-you cannot be considered as vital aspects of the industry.

Consider the failure of the railroad industry in the US, a favorite example of Levitt. During their heyday at the beginning of the 20th century, railroads were extremely profitable and attractive to Wall Street investors. No one in that business could imagine its demise just a few decades later.

But railroads didn't stop growing in the middle of the century because of competition from the technology of cars, trucks, planes, and even telephones. They stopped growing because they let rivals take customers. Their intense focus on their own products led to strategy myopia: they saw themselves in the *railroad* business rather than the *transportation* business.

Though no panacea, mapping experiences provides insight that helps expand the strategic aperture. For example, Tim Brown, CEO of IDEO, describes his company's work with Amtrak in his book *Change by Design*. His firm was brought in to redesign the seats of the Acela trains. The goal was to make the travel experience more pleasurable.

Rather than diving into the seat redesign, however, they first mapped an end-to-end journey around train travel, in general. They identified about 12 unique stages in the experience. This lead to different conclusions about their focus and how to improve the travel experience. Brown writes:

> The insight that proved most striking was that passengers did not take their seats on the train until stage eight—most of the experience of train travel, in other words, did not involve the train at all. The team reasoned that every one of the prior steps was an opportunity to create a positive interaction, opportunities that would have been overlooked if they head focused only on the design of the seats.

Alignment diagrams are a type of tool that point to such new opportunities. They visually align a description of the individual's experience with the offerings of an organization. They start with the customer's experience and work back towards the technology, as Steve Jobs once said reflected in the quote opening this chapter.

Consider the *opportunities* highlighted at the bottom of the Rail Europe diagram created by Chris Risdon in Chapter 1 (see FIGURE 1-5). These suggest tactical solutions, but go beyond that to point to larger, strategic questions. Should they become a provider of a travel information? Should they integrate with retailers and ecommerce partners? How can they reinvent support or the ticketing experience? This strategic insight is directly tied to the actual experience of train travel and shown in context in the diagram.

In this sense, diagrams offer a *new way of seeing* your markets, your organization, and your strategy—from the outside-in rather from the inside-out. Logically, they are most effective at initial stages of providing a service (FIGURE 3-2).

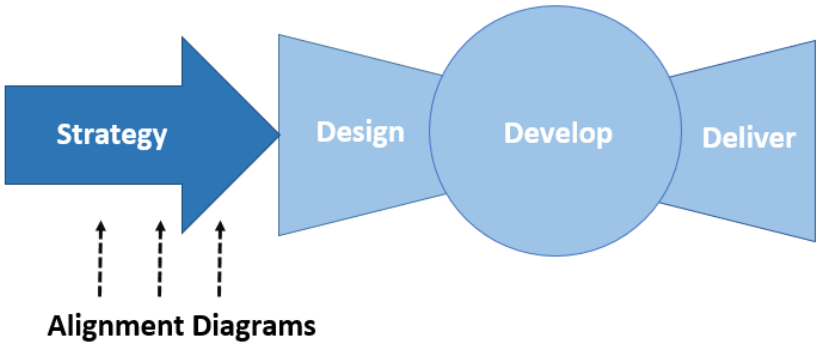


*FIGURE 3-2: Alignment diagrams provide insight from the outside-in and are best created upfront to inform strategic decision-making*

I believe the process of diagraming helps correct strategy myopia. In my experience, the resulting diagrams invariably show a much broader picture of customer needs than a business currently addresses.

But expanding your strategic field of vision requires change. The organization as whole must adapt to a new mindset. In particular, there are four key aspects involved:

1. Reframing competition
2. Creating shared value
3. Reimagining value delivery
4. Organizing to innovate

The next sections describe these aspects and how mapping experiences can play a role in each.

## 1. Reframe Competition

Traditionally, firms categorize customers by demographic or psychographic attributes: age, income, race, marital status, and so on. Or, they may look at purchasing behavior or company size.

In doing so, managers create categories that don't match their actual customer needs and motivations. No one ever bought a product *because* of their age or income. The typical one-size-fits all approach inevitably fails, causing managers to reshuffle their demographic categories arbitrarily.

An alternative model sees the market from the customer's perspective. Put simply, people buy products to get a job done. The outcomes people seek, not the customers themselves, are the primary dimension for meaningful segmentation (FIGURE 3-3).

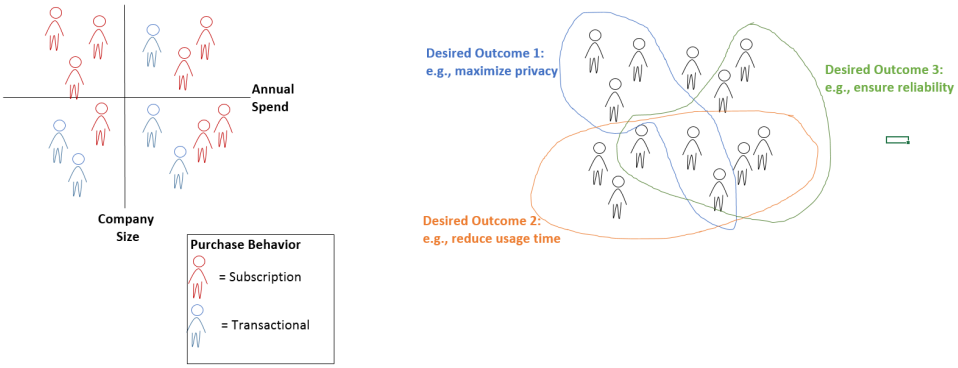


*FIGURE 3-3: Typical segmentation by demographic and behavioral dimensions (left) versus segmentation by desired outcomes (right)*

Recalling Levitt, Clayton Christensen and coauthors Scott Cook and Taddy Hall point to the failure of traditional segmentation practices. In their article "Marketing Malpractice" they write:

> …The prevailing methods of segmentation that budding managers learn in business schools and then practice in the marketing departments of good companies are actually a key reason that new product innovation has become a gamble in which the odds of winning are horrifyingly low.
>
> There is a better way to think about market segmentation and new product innovation. The structure of a market, seen from the customers' point of view, is very simple: They just need to get things done, as Ted Levitt said. When people find themselves needing to get a job done, they essentially hire products to do that job for them.

Shifting your perspective on segmentation reframes the competition. The job, not the industry or category as defined by analysts determines competition in the mind of the user. You don't compete against products and services in your category: you compete against anything that gets the job done from the user's point of view.

For instance, Scott Cook, founder of the tax software giant Intuit, once said:

> The greatest competitor [in tax software] … was not in the industry. It was the pencil. The pencil is a tough and resilient substitute. Yet the entire industry had overlooked it.*

Think about it: when preparing taxes making a quick calculation on a pad of paper is natural and hard to improve on. Cook knew his software needed to not only outperforming other tax software packages, it also needed to be more effective and simple to use as a pencil. Seen this way, tax software competes with pencils and anything else that gets the job done.

Diagrams can be used to track alternative means of getting a job done. For example, FIGURE 3-4 is an excerpt from a diagram detailing the workflow of barristers in Australia. It was part of a research effort I lead while at LexisNexis, a leading provider of legal

* Quoted in Scott Berkun's book *The Myths of Innovation* (O'Reilly, 2007)

information.* The bottom row shows how we mapped different ways of getting work done (in grey) to the steps in the workflow.

After visualizing competing solutions across the entire experience, I found barristers are as likely to do legal research at libraries or with free online resources as with our flagship database. This was eye-opening for stakeholders. The diagrams clearly illustrated how and where they contend with different services.

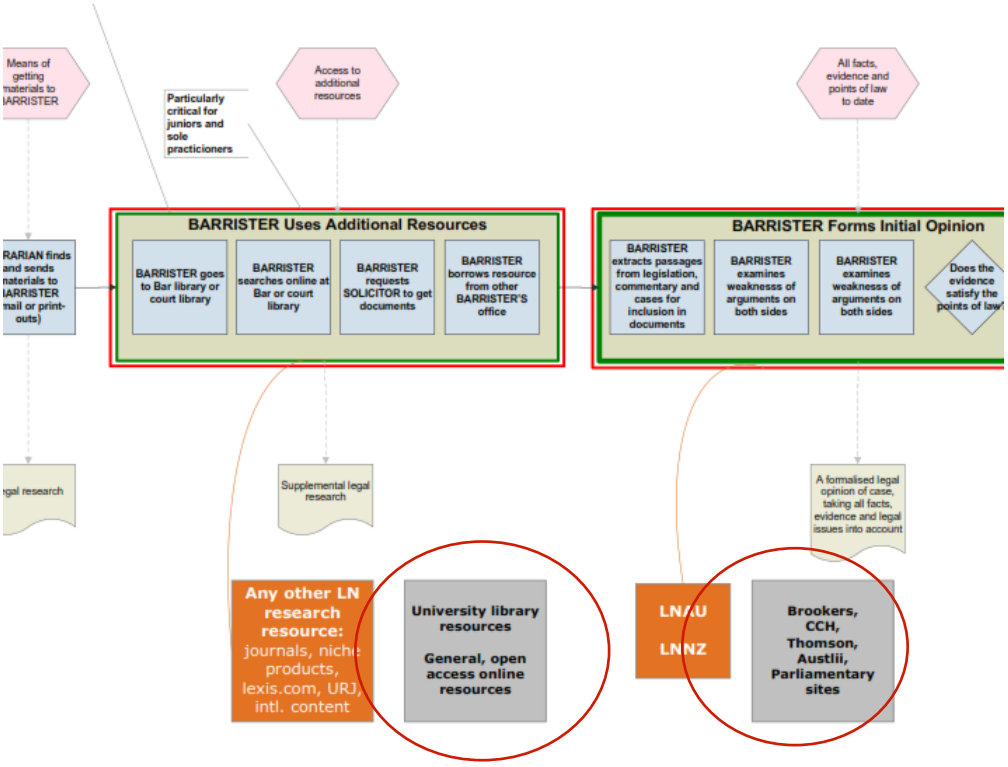


*FIGURE 3-4: A section of a diagram of a barrister's workflow. The elements at the bottom show the organization's solutions (in orange) and competing solutions (in grey)*

Business leader Rita Gunther McGrath believes markets should be seen in terms of what she calls *arenas*. Arenas are characterized by the experiences people have and their connection to a provider. She writes in her bestselling book *The End of Competitive Advantage*:

> The driver of categorization will in all likelihood be the outcomes that particular customers seek ("jobs to be done") and the alternative ways those outcomes might be met. This is vital because the most substantial threats to a given advantage are likely to arise from a peripheral or nonobvious location.

Diagrams of experiences challenge assumptions of who your competition really is. They reflect the needs of individual and illustrate the broader experience in which they are

* See the case study included in Chapter 11 for more details on this project.

relevant. This in turn enables you to see the market from the perspective of the customer, not by synthetic segmentation and traditional industry categorization.

## 2. Create Shared Value

After World War II, US corporations assumed a general *retain-and-reinvest* approach to strategy. They put earnings back into the company, benefiting employees and making the firm more competitive.

This gave way to a *downsize-and-distribute* posture in the 1970s. Reducing costs and maximizing financial returns, particularly for shareholders, became a priority. The widely held economic policy belief was that profit is good for society: the more companies can earn, the better off we all are.

This policy does not work.[*] As a whole, we are not better off. Since the 70s, American workers have been working more and making less. At the same time, shareholder value in the form of dividends and CEO wages have experienced a massive upturn. As a result, trust in corporations is at an all-time low. Businesses are increasingly blamed for many of social, environmental, and economic problems in general.

The good news is that the balance is shifting. There's a move from *shareholder* value to *shared value*. In his landmark article, "Creating Shared Value," strategy expert Michael Porter recognizes a tipping point in business: no longer can companies operate at the expense of the markets they serve. He writes:

> A big part of the problem lies with companies themselves, which remain trapped in an outdated approach to value creation that has emerged over the past few decades. They continue to view value creation narrowly, optimizing short-term financial performance in a bubble while missing the most important customer needs and ignoring the broader influences that determine their longer-term success.

This position is contrary to well-articulated belief that businesses have no agenda beyond making profit. Shared value instead links revenue to creating social benefit. This, in turn, provides a competitive advantage back to the organization. It's a win-win approach.

Shared value goes beyond social responsibility. It touches the heart of an organization's strategy. Every time a customer interacts with a company it creates value for society. There are three ways of thinking about shared value strategically:

1. **Reconceive your offering.** For example, Skype launched a program called "skype in the classroom." With this, teachers can collaborate with other instructors around the world and design different learning experiences for their students. In other words, *Skype is not only in the* videoconferencing *business, they provide* educational collaboration *opportunities for customers*.
2. **Innovate how products and services are produced**. For example, Intercontinental Hotels Group (IHG) introduced its GreenEngage program in 2009 to address its environmental footprint. To date, they've achieved energy savings of about 25%, and IHG differentiates itself with this program to

[*] For more on the adverse effects of maximizing shareholder value on society, see William Lazonick's critical article "Profits Without Prosperity," *Harvard Business Review* (Sep 2014)

customers. In other words, *IHG is not just a provider of* hotel rooms*, they are in the business of creating* environmentally conscious communities.

3. **Collaborate with partners in new ways.** Nestlé, for example, worked closely with dairy farmers in India, investing in technology to build a competitive milk supply systems. These simultaneously generated social benefits through improved health care. In other words, *Nestle doesn't just produce* food products*, they are in the* nutrition *business*.

The notion of shared value means that organizations need to conceive their value proposition on a way that takes many perspectives into account. Chief among these is a deep understanding human needs. For instance, in a video interview Porter advises:

> Figure out what your product is and what your value chain is. Understand where those things touch important social needs and problems. If you're in financial services, let's think about 'saving' or 'buying a home' - but in a way that actually works for the consumer.

Now consider FIGURE 3-5, a diagram of buying a home created by Sofia Hussain, a leading digital strategist in Norway. It shows the services of a fictitious home-listings company in the inner circle, labeled *inside activities*. The activities of the user—the *outside activities*—are listed in the bigger circle. Also included are touchpoint types, illustrated with small icons.

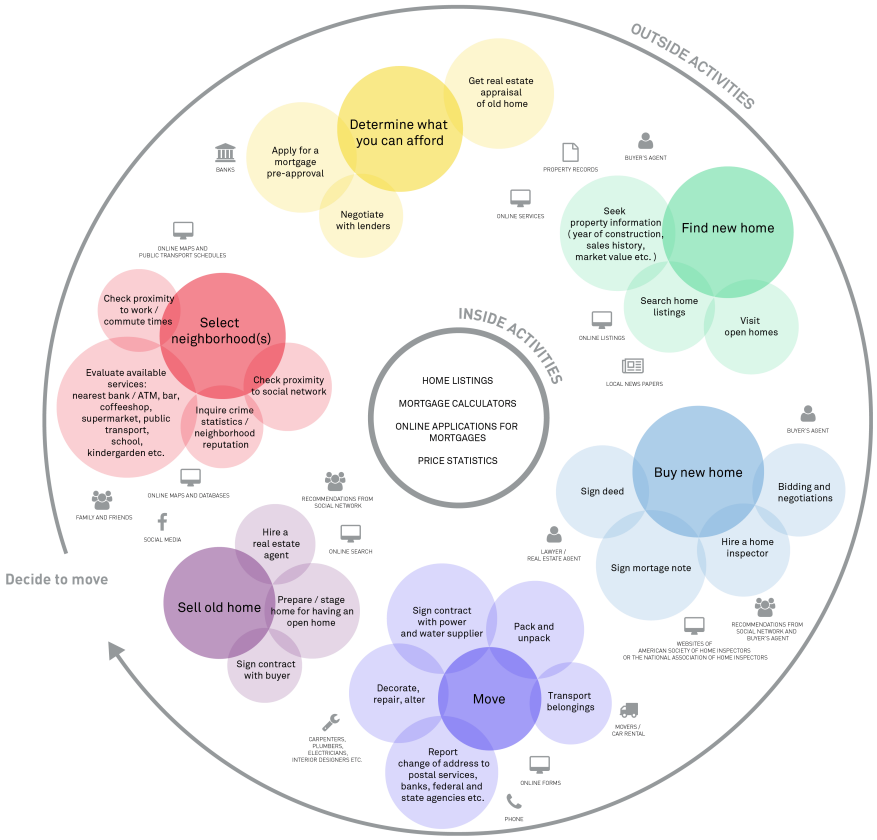


*FIGURE 3-5: A map of the experience of "buying a home" created by Sofia Hussain*

In her article, "Designing Digital Strategies, Part 2," Hussain suggests a strategic scenario for the company: they want to expand their business with services that address more customer needs in this domain. The intent is to move from a business for simply *buying a home and moving* to one that *helps people settle into a new home*. This diagram can be used to illustrate how that expansion fits into the overall experience from the customer's perspective.

Shared value goes one step further by increasing services or moving into a playing field. It requires the company to ask how they might also create social benefit.

For example the company might promote healthier lifestyles by offering coordinating home listings with information about neighborhood *walkability*. Examining the map in FIGURE 3-x, services around *selecting a neighborhood* and *finding a new home* are points of interaction where presenting walkability information make sense.

But potential saved costs of walking could also be included in *determining what you can afford*. Perhaps the system could show how much money is saved by reducing gas expenses or getting rid of a car altogether.

With shared value in mind, the strategic aspiration of the company becomes even broader: it's more than just about buying a home or even settling into a home: it's about *creating a healthier, environmentally-friendly lifestyle when buying a new home*.

Diagrams help us think through the interactions and customer needs in a holistic way. They look at an offering in a way that actually works for the consumer—to recall Porter. Finding shared business value relies on such examinations of the overall experience.

## 3. Reimagine Value Delivery

As the size of computer chips get smaller and smaller, it becomes increasingly more feasible to embed processing power into common objects. Once fitted with a microcontroller, physical products can connect to the Internet. Dubbed the Internet of Things (IoT), smart, connected devices expand possibilities and how you deliver value.

The Belkin crockpot (FIGURE 3-6), for example, takes a regular kitchen appliance and connects it to the internet. With an accompanying app, cooks can now control the device remotely. The crockpot can also be linked to other devices inside and outside the home.


*FIGURE 3-6: The Belkin WeMo CrockPot Slow Cooker is connected to the internet.*

When everything from computers to cookware has a digital component, the design of the overall experience becomes more challenging. Success determined by how well their services fit with each other and, more importantly, how well they fit into people's lives. Part of the value that organizations deliver, then, is how their offerings integrate into a larger ecosystem (FIGURE 3-7)

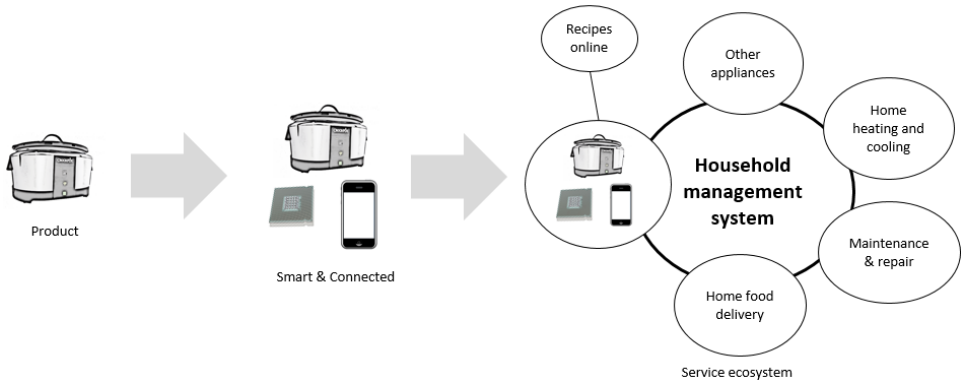

*FIGURE 3-7: As products become smart and connected, they fit into an ecosystem of services*

Diagrams visualize the components of the ecosystem. For example, Claro Partners, a leading European design consultancy based in Barcelona, developed a straightforward approach for mapping the various elements in an IoT system. They created a series of cards for different aspects typically involved (FIGURE 3-x). Teams fill out cards and then arrange them into a diagram of the ecosystem.


*FIGURE 3-8: IoT cards created by Claro Partners, used to generate an ecosystem map of connected services*

FIGURE 3-9 shows an example of a resulting map, in this case for the Nike Fuelband. It reveals important interdependencies in the experience, such as a relationship between Fuelband users, as well as a connection between physical devices, software, and data services.

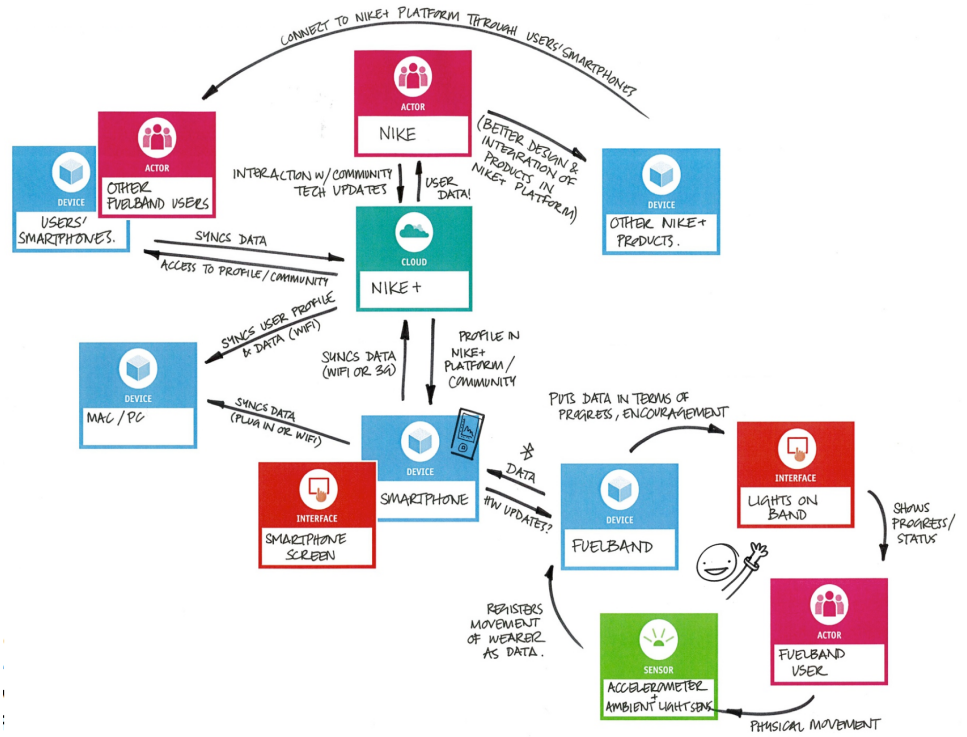


*FIGURE 3-9: A simple diagram of an ecosystem of connected services created by Claro Partners*

IoT doesn't just make it harder to conceive and design new products. It fundamentally changes strategy. Your service will inevitably be part of a system of services. Creating and delivering value into that system cannot be ignored. Diagrams help you understand the complexities and interrelationships involved.

## 4. Organize for Innovation

Some leaders have a Darwinistic view of innovation: they believe best new concepts will rise to surface on their merit alone. This perspective fails to take into account corporate antibodies motivated to protect existing revenue that can squash fledgling ideas summarily.

How the organization is structured is part of the problem. The best ideas will fail if they are feed into an organization that is not set up to accept them. The first step is to overcome motivations and incentives that seek to optimize short term financial returns.

Charles O'Reilly and Michael Tushman recommend establishing an *ambidextrous* organization. To do this, set up divisions within the organization that have separate goals and expectations (FIGURE 3-10). This is particularly important for emerging businesses, where new ideas need a chance to take hold.

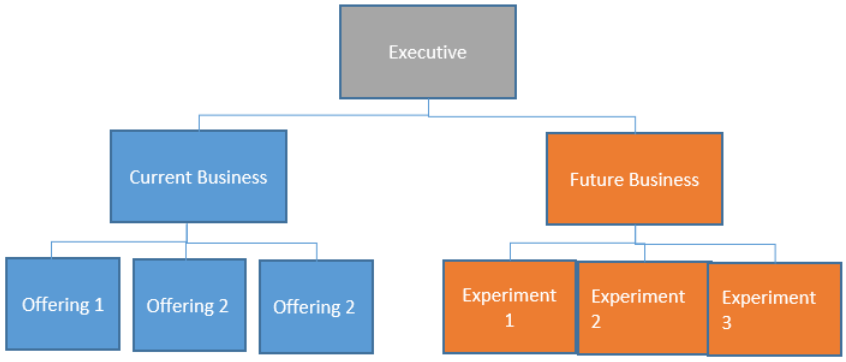


*FIGURE 3-10: The ambidextrous organization separates effort types structurally*

Beyond becoming ambidextrous, you also need to organize around the customer experience. For instance, a client at an ecommerce provider once introduced himself as a member of the *Discovery* group. He explained their jobs was to help people find the products they offered, regardless of channel or medium. They also had teams for *Purchasing* and *Success*. In other words, their organization mirrored the customer journey, not functional lines or technology types (FIGURE 3-11).

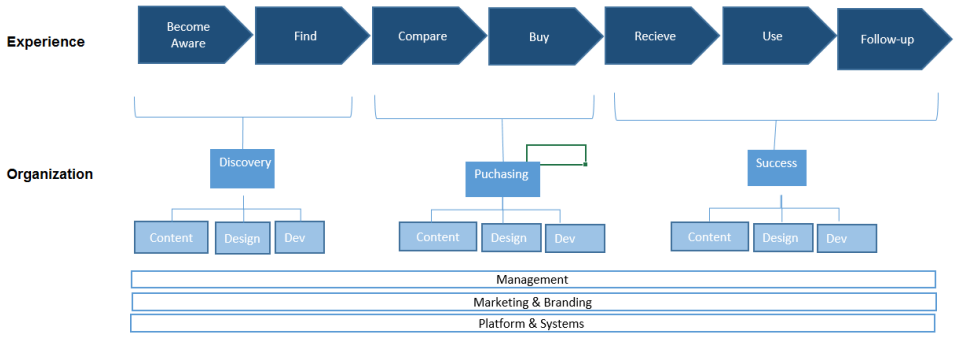


*FIGURE 3-11: An example of organizing around the customer experience*

Some functions spanned these experience-centric teams. But people in those roles were compelled to align to the customer oriented teams in conversations and in decision making. The effect was a new type of creative problem solving within the organization. Solutions better matched customer needs.

Alignment diagrams provide the basis for this type of organization. They reveal a model to follow that mirrors the individual's experience. This leads to a new way of seeing your offerings, which in turn foster innovation.

# Mapping Strategy

Strategy is typically created behind closed doors at the top levels of an organization. Leaders then reveal the strategy to the rest of the organization—usually as a PowerPoint presentation. Employees are then expect to "get it" and somehow be able to magically align their work to the strategy.

But when things go wrong later on, these same leaders blame failure on poor execution. They overlook the fact that strategy and its execution are related: a brilliant strategy that can't be implemented isn't brilliant.

Poor communication is only part of problem. *How* strategy gets created also matters. The process must overcome gaps in understanding across the entire organization. Otherwise, the realization of strategic intent has no chance.

Business consultant and author Nilofer Merchant has observed a disconnect between the top and bottom layers in many organizations. She describes it as an *Air Sandwich* in her book *The New How* (O'Reilly, 2009). Merchant explains:

> An Air Sandwich is, in effect, a strategy that has a clear vision and future direction on the top layer, day-to-day action on the bottom, and virtually nothing in the middle–no meaty key decisions that connect the two layers, no rich chewy center filling to align the new direction with the new actions within the company.

To address the Air Sandwich, companies should view strategy creation as an inclusive endeavor. But the traditional tools strategy creation only confound the situation. Words are abstract and open to interpretation. Documents bewilder and confuse. Emails and communications are unintelligible by those who must implementing a strategy.

Diagrams are an antidote. They open up strategy for broader involvement across an organization and increase general comprehension.

The next sections describe several tools that *complement* alignment diagrams. They all seek to visualize strategy or parts of it. These include strategy maps, the strategy canvas, the strategy blueprint, and the business model canvas and value proposition canvas. Diagrams of experiences plug in to these techniques, informing customer-related aspects.

## Strategy Map

A *strategy map* represents an organization's entire strategy on a single sheet of paper. The technique was made popular by veteran business consultants Robert Kaplan and David Norton in their book *Strategy Maps*. This approach emerged from research and years of experience consulting with client companies and is part of their earlier framework called *the balanced scorecard*.

FIGURE 3-12 shows an example of a generic strategy map. Each row represents objectives from one of four strategic perspectives:

- **Learning and growth of employees**—This perspective outlines the knowledge, skills, and systems that the organization needs to deliver the intended value.
- **Internal processes**—Goals at this level reflect the capabilities and efficiencies of organization as a whole
- **Customers**—This perspective represents the value proposition. Here, alignment diagrams reveal what customers actually perceive as valuable.
- **Financials**—The top level objectives centered on the value captured by the organization in terms of financial gains.

The resulting map is more than just a list of goals. The map connects the objectives to show causality. From this standpoint, strategy is a series of IF-THEN statements, as Kaplan and Norton point out.

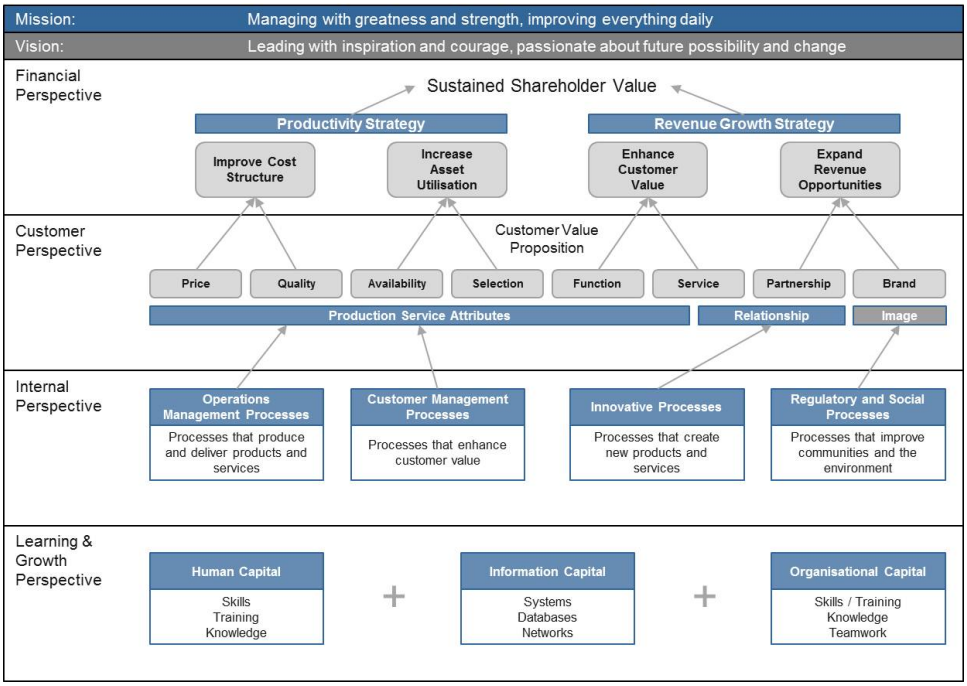


*FIGURE 3-12: A generic strategy map showing the hierarchy of relationships between objectives.*

Consider a simple example strategy map for Patagonia in FIGURE 3-13 created by Michael Ensley, a business consultant with PureStone Partners. Environmental goodwill is a key strategic objective prominent in the diagram. Anchoring it here makes it visible to everyone else in the organization.

The center of this example shows how Patagonia intends to create customer value. A key internal process is indicated as *solve their [i.e., customer] problems*, which is linked to two aspects: *provide extreme gear* and *protect our clients*. Alignment diagrams foster the type of conversations needed to arrive at these problems to solve.

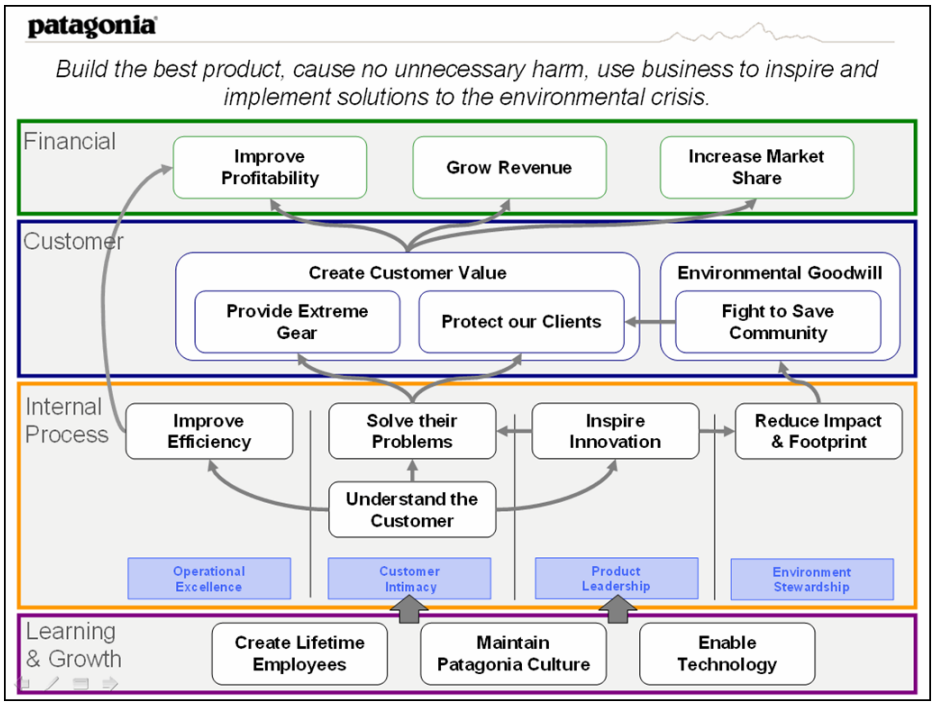


*FIGURE 3-13: An example of a strategy canvas for the sporting goods company Patatgonia*

Strategy maps provide a balanced view of the interlocking set of strategic choices an organization makes. They illustrate the relationships in objectives and allows others to see how their activities fit into the strategic whole.

## Strategy Canvas

The *strategy canvas* is a visual tool to both diagnose existing strategies and build alternative ones. It was developed by W. Chan Kim and Renee Mauborgne around 2000 and featured in their groundbreaking book *Blue Ocean Strategy*. FIGURE 3-14 shows an example strategy canvas for Southwest Airlines.

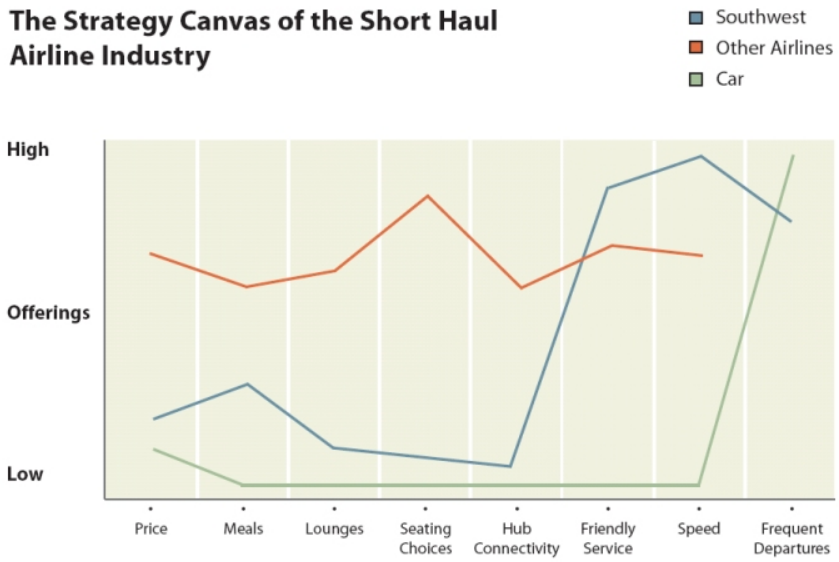


*FIGURE 3-14: An example of a strategy canvas for Southwest airlines*

Across the bottom are the primary factors of competition. These are aspects that create value for customers and the dimensions along which firms compete. The vertical axis indicates relative performance for each factor from low to high. This arrangement reveals a picture of how several organizations create value compared to each other.

A strategy canvas reflects the key dynamic in the blue ocean strategy approach. Red oceans, Kim and Maubornge explain, represent fierce competition of existing industries in a given domain. As the space gets crowded, market share for each organization dwindles, and the waters become bloody.

Blue oceans represent uncontested market space. Demand is *created* rather than fought over. Their advice is clear: don't directly compete with rivals; instead, make them irrelevant.

To do this you must make hard tradeoffs. Southwest chooses *not* to compete along the traditional factors of airline service. Instead, they focus on frequent departures from smaller airports. In doing so, Southwest competes with car travel: customers who may have driven between two cities might now consider flying with Southwest instead. The airline trades off hub connectivity with frequent departures to do this.

The process for creating a strategy canvas takes the following steps:

1. **Determine factors of value creation.** It may be easy to come up with dozens of potential factors. The key is to focus on the most important ones. This is where alignment diagrams come in: they help identify these factors. They show what problems the organizations and how value is perceived from their perspective.
2. **Determine competitor types**. The trick is to select a limited set of representative competitors. Three is ideal. Including more than four competitors reduces the impact of the resulting diagram greatly.

3. **Rate performance for each factor**. Typically this is estimated on a relative scale of low to high. It's also possible to get empirical evidence for each rating, such as through a survey.

An alternative approach to determining the factors of value creation is to focus on *types of experiences* individuals have. For instance, from a customer journey map you may have identified half a dozen or so phases of interaction, e.g., becoming aware, purchasing, initiating the service, using the service, extending and renewing, and getting support. For each you can compare how competing services perform (see FIGURE 3-15).


*Figure 3-15: An example experience-based strategy canvas*

This approach may not help you find a blue ocean per se, but provides valuable insight and an experience-based view of the strategic landscape.

## Strategy Blueprint

Strategy is difficult to define precisely. On the one hand, it gets confused with *analysis*. This includes everything from market size to technical assessments to financial prognosis. The result is often reports that fill up dozens of pages.

On the other hand, strategy gets conflated with *planning*. You've probably witnessed annual strategy retreats in your organization, where leaders spend several days forging plans for the upcoming year. They then emerge from seclusion with detailed roadmaps and financial plans that become quickly obsolete.

Analysis and planning, while necessary inputs and outputs in the strategy creation process, are not the core of strategy. You can't analyze your way to strategy: the answers don't magically emerge from data. And detailed roadmaps don't provide the rationale for the activity they organize. Strategy does. (see FIGURE 3-16).

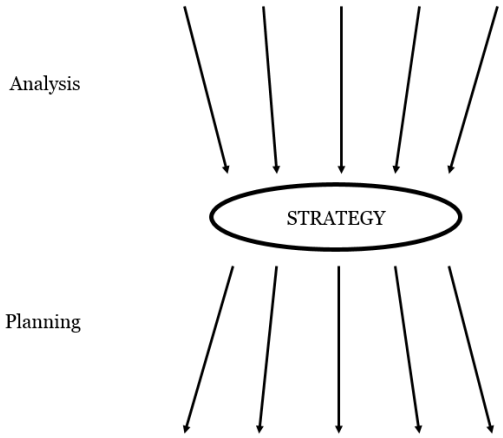


*FIGURE 3-16: Strategy provides logic between analysis and planning*

Strategy is about devising a way you believe you'll best overcome challenges to reach a desired position. It is a creative endeavor, not based on analysis and planning alone. Strategy represents the logic that connects analysis and planning. Ultimately, it's how your organization makes sense of its actions and decisions over time.

I developed the *strategy blueprint* as a tool to visualize this central strategic rationale.[*] It uses a canvas format to help visualize the relationships between elements of the strategy.

FIGURE 3-17 shows an example of filled out strategy blueprint. In this case, it reflects the strategy of a fictitious company, Einstein Media Company, a publisher of scientific journals, books, and information. The company has lead the industry for nearly 100 years, and scientist around the world trust their brand name.

[*] You can download a PDF of the strategy blueprint from my blog: https://experiencinginformation.wordpress.com/2015/09/02/strategy-blueprint/

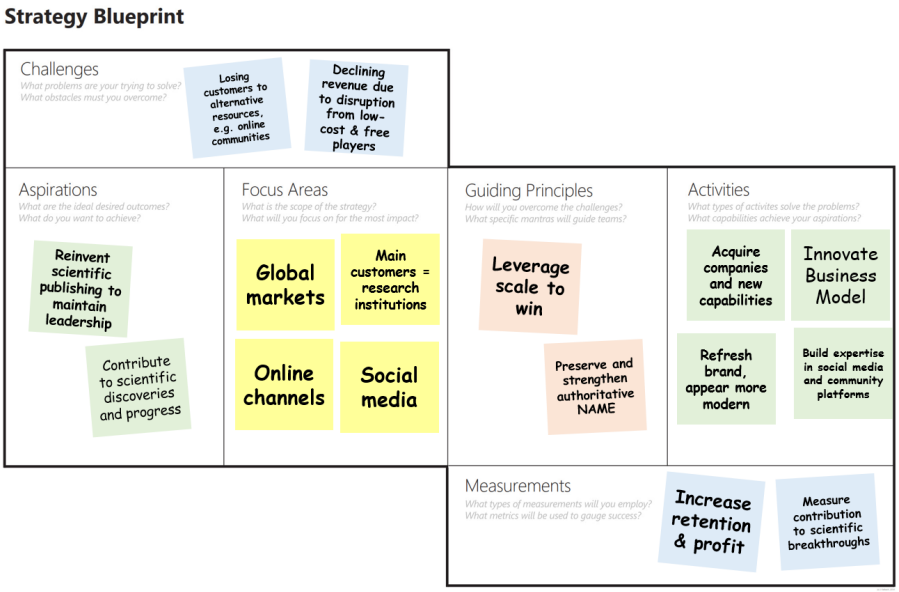


*FIGURE 3-17: The strategy blueprint template for a fictitious company, Einstein Media Company*

The elements in the strategy blueprint are based on research in the field. First, it borrows from Henry Mintzberg's five Ps of strategy from his book *Strategy Safari*. These are combined with Roger Martin and A.G. Lafley's five questions of strategy in their recent book *Playing To Win*. (Both books are highly recommended).

TABLE 3-1summarizes and aligns these two existing frameworks. The last column reveals their thematic intersection, yielding six common elements of strategy.

| LAFLEY & MARTIN | MINTZBERG | ELEMENTS OF STRATEGY |
|---|---|---|
| | Pattern | What **challenges** motivate you? |
| What is you winning aspiration? | Position | What are your **aspirations**? |
| Where will you play? | Perspective | What will you **focus** on? |
| How will you win? | Ploy | What are your **guiding principles**? |
| What capabilities are needed? | Plan | What types of **activities** are needed? |

| | | |
|---|---|---|
| How will you manage strategy? | | How will you **measure** success? |

*TABLE 3-1: The intersection of existing frameworks to arrive at the six elements of the strategy blueprint*

Each element is given a box in the blueprint.

- Challenges. Strategy implies the need for change, a desire to move from point A to point B. What are the hurdles to doing so? What opposing forces must you overcome to be able to reach your goals?
- Aspirations. What kind of organization do you aspire to be? What do you aspire for customers and for society? Alignment diagrams offer information that can inform creating a strategic aspiration.
- Focus areas. Setting a scope to your strategy helps you concentrate effort on the things that matter most. Who will you serve? What regions will you play in? Which jobs to be done will you target?
- Guiding principles. These are the pillars of your strategy you believe will overcome the challenges you face. What mantras will unite teams and unify decision making?
- Activities. What types of activities are needed to implement the strategy and achieve your aspirations? Note that this is not about making a roadmap or plans, rather looking at the skills and capabilities you'll ultimately need.
- Measurements. How will you know your strategy is on track? How can you show progress and success?

Building strategy is a creative endeavor. The strategy blueprint allows you to explore options with no initial risk. Try alternatives, cross items off, rework ideas, and start over again. The blueprint helps you design strategy. Use it in briefings, workshop, or as a reference document.

There is no prescribed order to completing the blueprint. Typically, it's best to start with the challenges and aspirations. After that you may find yourself moving freely between the boxes. The blueprint helps you see all the moving parts of strategy at once, making it tangible and inclusive to others.

## Business Model Canvas

The *business model canvas* is strategic management tool that helps business owners and stakeholders discover different business models. Alexander Osterwalder first introduced it in his book *Business Model Generation* (Wiley, 2010). It has become very popular since them.

The nine boxes of the canvas represent the key components of a business model (FIGURE 3-18.). There is a logic to their arrangement. The boxes on the right represent market-facing aspects, called the *front stage*. On the left are the *back stage* element of a business model—the internal business processes.

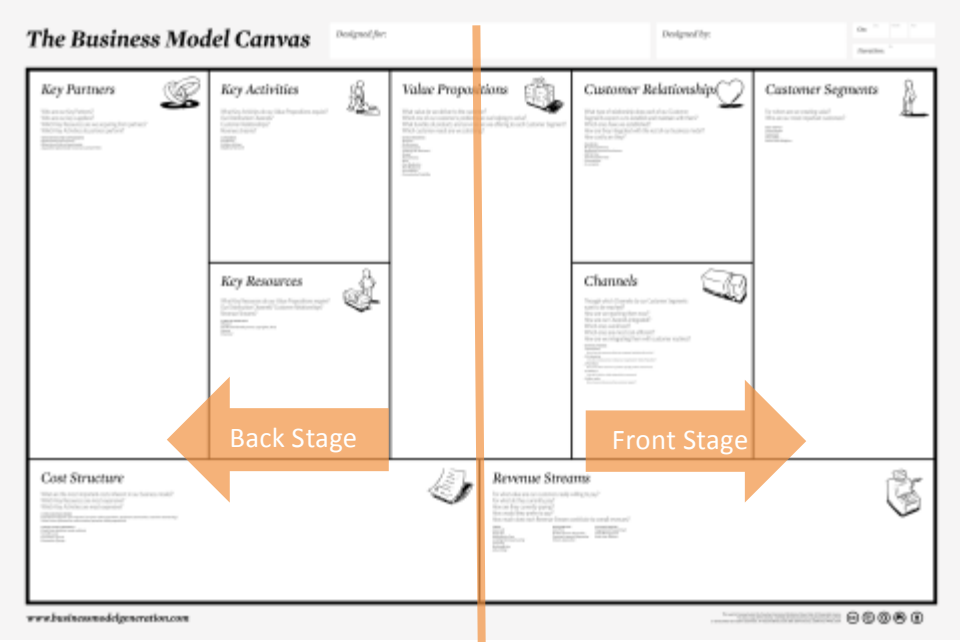


*FIGURE 3-18: Business model canvas by Alexander Osterwalder*

The visual format of a canvas promotes exploration. You can quickly try out alternative models and evaluate them before making a commitment in any one direction. It's allows you to apply creativity to business decisions.

FIGURE 8-19 shows a visualization of the business model for the silicon provider Xiameter's compared to its parent company, Dow Corning. It is based on the article "Dow Corning's Big Pricing Gamble" by Loren Gary. The green notes represent Dow Corning's core business. The orange notes show the Xiameter model. Interestingly, Xiameter seems to have had an effect back on the core business model, according to the article. These aspects are shown in blue notes.


*FIGURE 8-19: The business model of Xiameter, a provider of silicon, to its parent Dow Corning*

FIGURE 8-20 shows a photo of a canvas I completed with together stakeholders after an ideation session. Using sticky notes, we were able to move information around as needed and consider any possible alternatives. This allowed us to test assumptions of a new concept from a standpoint of business viability.

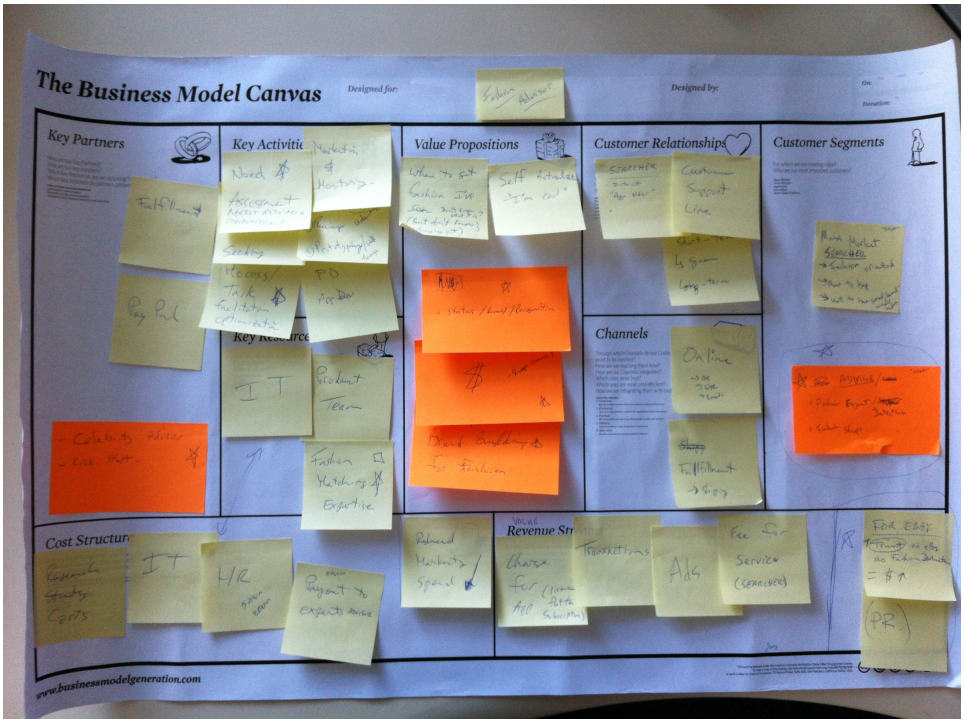


*Figure 8-20: An example business model canvas using sticky notes to explore options*

Working with the business model canvas takes some practice. You have to be able to recognize different types of information quickly and sort them into their respective boxes. Once you get the hang of it, use the canvas to quickly discover alternatives. There are many resources online to learn more about the business model canvas.

**Value Proposition Canvas**

The basic grid structure of the business model canvas inspired the development similar tools. Once such example is the *value proposition canvas* (see FIGURE 8-21), also created Alexander Osterwalder. It is directly related to the business model canvas and plugs into two business model elements: the *customer segments* you wish to create value for and the *value proposition* you believe will attract customers.

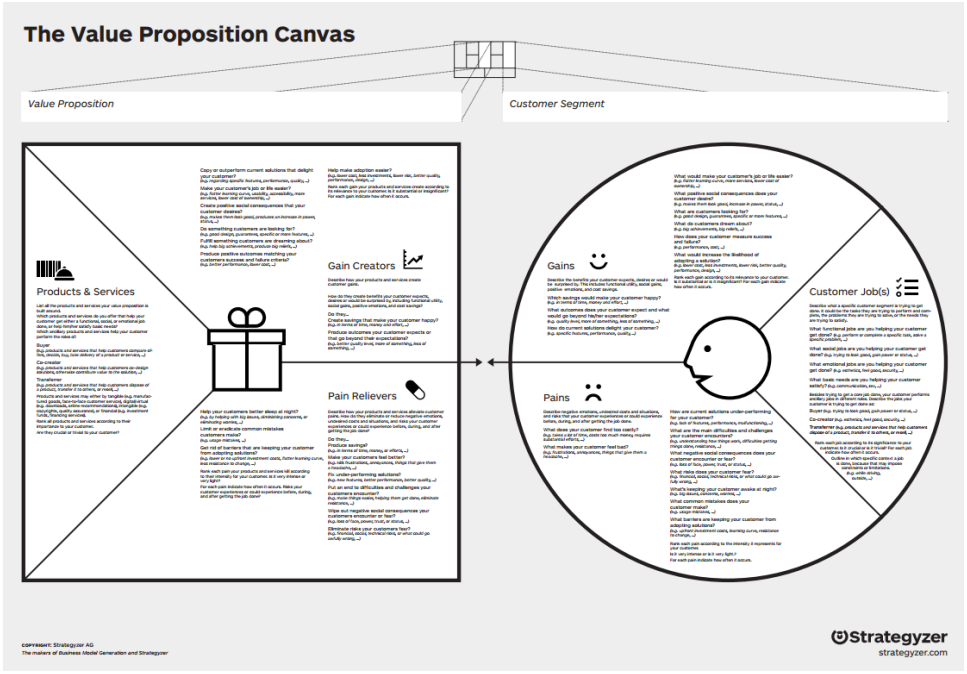


*FIGURE 8-21: The Value Proposition Canvas created by Alexander Osterwalder and his company, Strategizer.*

The value proposition canvas allows you to design and test the fit between what you offer and what customers want.

There are two parts. On the right is the customer profile with three components:

- Jobs to be done: These are the important issues people want solved and the needs they are trying to satisfy.
- Pains: These are the barriers, hurdles, and annoyances people have in trying to get a job done. This includes negative emotions and risks they may encounter.
- Gains. These are positive outcomes or benefits the individual desires.

The other half of the canvas on the left side details the features of your value proposition. There are three elements here:

- Products & services: These represent your offering, including the features and support you provide.
- Pain relievers: This is a description of how your offering will alleviate the customer's pains. These show which problems you're addressing.
- Gain creators: These make explicit how your products and service benefit customers.

By mapping the left side to the right side, you can make explicit how you are creating value for your customers. When the pain relievers and gain creators correlate to the pains and gains of customers, you have a potential strong fit. Validate your assumptions with your markets once you have a formed a clear position.

# Summary

As organizations mature, they develop *strategy myopia*—a failure to see the broader landscape of their business and how they can continue to create meaningful value. Successful enterprises start with insights about customer needs and work backwards to their strategy. This reverses many existing practices in business, which seek to push products and service through traditional sales channels.

To change, organizations need to consider additional sources of insight often left out of strategy creation. This includes a deep understanding of how customer perceive value. Visualizations of various kinds broaden your field of vision and offer new way of seeing.

First, consider how to *reframe competition*. In the eyes of your customer, anything that gets the job done is your rival.

Also consider how you contribute back to society and *create shared value*. Shared value is about creating societal benefits with every customer interaction, going far beyond corporate social responsibility.

The internet of things forces us to *reimagine value delivery*. Connected, smart products inevitably become part of a larger ecosystem. The value you create is delivered and experienced as part of that context.

Finally, *organize to innovate*. First, separate protecting existing value from creating new value by setting up different divisions in the organization. Then, organize teams to align with the customer experience.

Visualizations tend to open up strategy, making it not only more understandable but also more inclusive across the organization. Several techniques help illustrate strategy graphically. These include strategy maps, strategy canvases, the strategy blueprint, and the business model canvas and value proposition canvas. They complement and extend alignment diagramming.

# Resources

A.G. Lafley & Roger Martin. *Playing to Win: How Strategy Really Works* (2013)

> This book offers a clear framework for understanding strategy, in general, based on five key questions. It is one of the most lucid and useful approaches to strategy available today. The authors provide case studies and examples from their decades of experience. This is essential reading for anyone looking to understand strategy.

W. Chan Kim & Renee Mauborgne. *Blue Ocean Strategy* (Harvard Business Review Press, 2005)

> This landmark book from the pioneers of blue ocean strategy explains the approach in detail. The key isn't to compete with rivals directly, the authors urge, rather to make them irrelevant. To do this, organizations need to find new attributes of value creation. Visualizing the landscape in a strategy canvas is a key way to identify opportunities of this kind. Many of the blue ocean strategy tools and resources are available on the internet, e.g., at www.blueoceanstrategy.com.

Rita McGrath. *The End of Competitive Advantage* (Harvard Business Review Press, 2013)

Strategy is stuck, declares McGrath in the compelling book. Existing frameworks view strategy as achieving a sustainable competitive advantage. Instead, organizations need to develop a new set of practices based on transient competitive advantage. This entails not only constantly finding new value, but also ramping down existing offerings as they become exhausted. This is an eye-opening book that is accessible to non-business readers.

Michael Porter "What Is Strategy," *Harvard Business Review* (1996)

This is one of the most cited articles on strategy. Though dense at times, strategy guru Michael Porter lays out a clear perspective on strategy. The crux of strategy, he explains, is making tradeoffs that differentiate one firm's offerings from another.

# Images Credits

FIGURE 3-1: Diagram recreated and adapted from a figure appearing in Ram Charan's book *What The Customer Wants You To Know.*

FIGURE 3-4: Excerpt of a diagram created by Jim Kalbach for LexisNexis

FIGURE 3-5: Ecosystem map created by Sofia Hussain, appearing in the article Hussain, Sofia. "Designing Digital Strategies, Part 2: Connected User Experiences," UX Booth (Jan 2015), used with permission

FIGURES 3-8 and 3-9: IoT cards and ecosystem map for Nike FuelBand created by Claro Partners (www.claropartners.com) from their free resource "A guide to succeeding in the Internet of Things" (http://www.claropartners.com/IoTGuide/Guide-to-succeeding-in-the-IoT_Claro%20Partners.pdf) used with permission

FIGURE 3-12: Strategy Map example created by Intrafocus Limited, UK (www.intrafocus.com), used with permission thanks to Clive Keyte

FIGURE 3-13: Patagonic strategy map created by Michael Ensley of PureStone Partners, originally appearing on his blog post "Going Green": http://purestonepartners.com/2009/06/17/going-green/, used with permission

FIGURE 3-14: Strategy canvas for Southwest airlines, redrawn and adapted from Kim and Maubornge

FIGURE 3-17: Strategy blueprint created by Jim Kalbach

FIGURE 3-18: Business Model Canvas, by Alexander Osterwalder, downloaded from http://www.businessmodelgeneration.com/canvas/bmc, Creative Commons share alike 3.0

FIGURE 3-19: Example of a completed business model canvas comparing Xiameter to Dow Corning, created by Jim Kalbach. For more on this case study see: "Business Model Design: Disruption Case Study" (Sep 2011). https://experiencinginformation.wordpress.com/tag/business-model-canvas/

FIGURE 3-20: Photo of a business model canvas used in a workshop, by Jim Kalbach

FIGURE 3-21: The Value Proposition Canvas created by Alexander Osterwalder and Strategizer, downloaded from http://www.businessmodelgeneration.com/canvas/vpc, used with permission.

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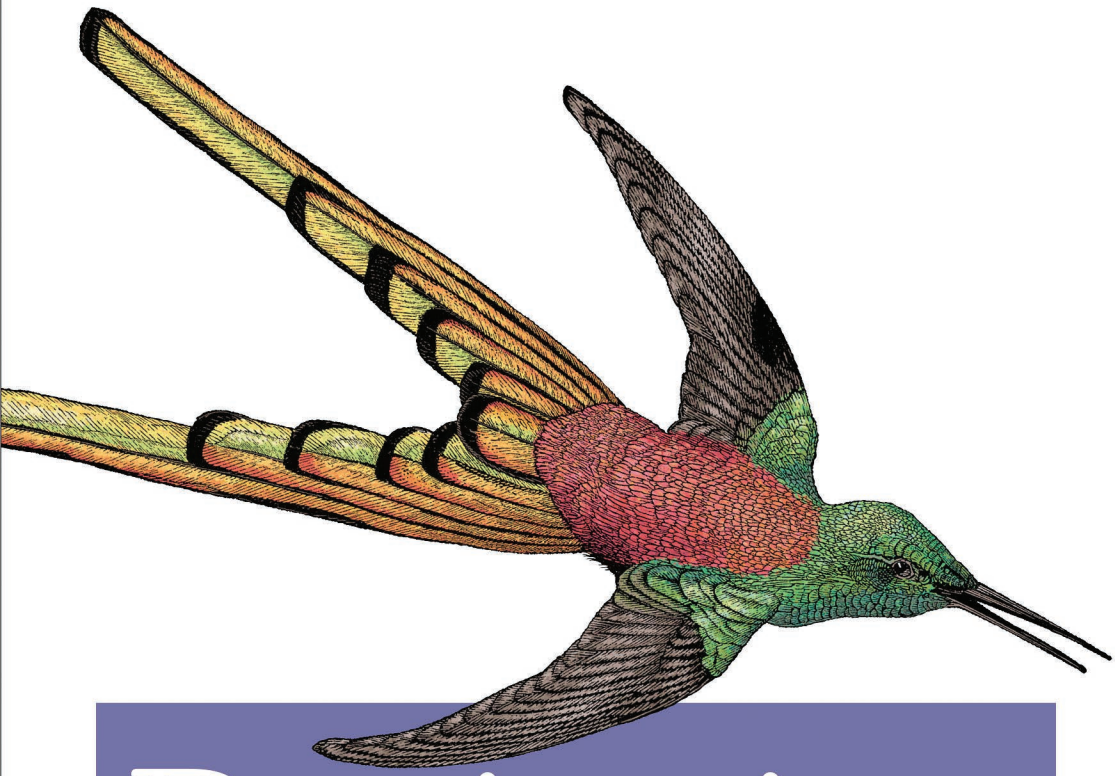

# Designing with Data

IMPROVING USER EXPERIENCE
WITH LARGE SCALE USER TESTING

Rochelle King &
Elizabeth F. Churchill

# Chapter 5

# Culture and Communication

## Introduction

As we mentioned at the beginning of the book, the strategic and programmatic capture, management and analysis of user behavior data are typically not considered to be a part of good design practice. Indeed, quantitative data collection and analysis to drive design decisions in particular has been contentious and has sometimes even had a polarizing effect on designers and product managers.

However, we believe that designers need to play a part in the design of data capture and analysis, as we have argued in earlier chapters. We also believe that designers can play a key strategic role in *companies by engaging in the design of data communication strategies and practices*. However, to communicate most effectively you need to be willing to interrogate and get your hands into the data yourself, to be part of designing the tests so you know where the results came from.

This chapter follows on from our description of business cultures in Chapter 2 to address company culture and specifically *group and company communication cultures*. We focus on communicating data driven and data informed ideas, showcasing where product excellence is derived from systematic and programmatic engagement with data and how to put the foundations in place for *a data aware group and company culture*. Creating a culture where all of this comes together well really depends on three key things: the material to be presented, the presentation format and process, and the people.

When you have a culture that supports data communication and prioritizes collaborative learning, it is easier to create strategic, tactical and operational business alignment. More than that, as a design practitioner, data is one of the best ways to persuade people of your case, to support your arguments and this to more effectively advocate for your users and create the most effective and delightful experiences. Data allows you to bring your users' voice into the conversation, helps you know which interactions are the most important and when. In some senses the usage data you capture is a representation of your user, of what they care about and when, of what they need and don't need. So you need to design your data to help you know your user better.

Although we focus on communication here, we *don't* intend this chapter to offer you the foundations for becoming a marketer/PR person, nor a data visualization expert. These

are both of skillsets and competencies you may want to hire for and/or leverage as you design your company's internal- and external-facing communication strategies. Rather, we are advocating that you work by enacting 6 principle activities:

(1) aim for **shared understanding** of the value of user centered as a company **universal**, by …

(2) laying the foundations for engaged and transparent conversations about systematic data collection, in order to …

(3) create alignment, and locate and establish allies and co-partners across company functions.

Also aim to

(4) hire and internally recruit the right people, and to

(5) articulate the long term benefits and the ability to do effective pattern finding across different kinds of data set and to

(6) drive a culture of learning, and communicate what you've learned with clarity and integrity.

On integrity, in our next chapter we will investigate more on the issues to do with ethical data collection.

In this chapter, we'll cover two things:

1) What a data informed culture looks like
2) Some tactics that you can use to get there

## Benefits of designing your culture of communication

When it comes to user data, summarization and communication are key to having an impact on business.

In a recent Harvard Business Review article (April 2014) the benefits of being a design led organization were outlined. It is clear that those design organizations that are most successful are ones where communication is carefully crafted.

What are the benefits of carefully crafting and designing communication around data? A culture of communication allows deeper business understanding, including understanding of actual and hoped-for users, and for better product experience over a customer life-time. Creating a culture of questioning, learning and data innovation, and a culture that develops a common set of goals, and agreed on set of *user-focused* metrics and a common vocabulary *will* lead to a more successful business. There are a number of ways of achieving this that we will discuss in this chapter:

- Aim for **shared understanding** of the value of user centered as a company **universal…** *which requires you to*
- Lay the foundations for engaged and transparent conversations about systematic data collection. You need to **create a dialogue, set expectations and** develop a **common vocabulary.**
- **Create alignment**, and **locate and establish allies and co-partners across company functions**….*and*….

- **Build a team** through strategic hiring to reflect, amplify and grow the above…..*and*
- Articulate the long term benefits and the ability to do effective pattern finding across different kinds of data set by **establishing a disciplined and consistent approach to leveraging data** that is programmatic, flexible and not rigid …..*by*
- Creating a **learning organization** to ensure you perennially **grow your knowledge base.**

We'll walk through each of these points to help you think about which things you want to adopt for your organization and which may not make as much sense for you or your team. At the end of the chapter, we'll suggest some tactics that you might use as you build up your own culture of data informed design.

**Principle #1**

> **Aim for** shared understanding **of the value of user centered as a company** universal

For a data informed approach to be successful in any organization, it must be both universally embraced and understood. By "universal" we mean both in terms of *depth* (that is accepted at all levels, from senior executives to individual contributors) and *breadth* (that it is accepted throughout the company, beyond the product development organization as well). This means that people at all levels in the company and across a broad set of functions within the company recognize that all kinds of data are triangulated to inform product decisions, and that they have a part to play in designing, understanding and interrogating data. It also means that they have at least a basic understanding of what this process looks like and what the pros and cons are of using data are. This means that there is a good "support net" for data informed design to happen – having this level of transparency in the process and common understanding can help to keep the design and product teams accountable to good practices.

**Depth: Top to bottom**

Because a data and design framework is conceptualized as being in opposition to "gut" decision making, it is often also about breaking the hierarchical decision making structure. Traditional management-led, top-down decision-making based on hunches goes away, and is replaced by company-wide, all-level data literacy which includes addressing well-formulated, carefully investigated questions. While this is the norm for business analytics, this needs to be developed for user behavior analysis for more effective customer-centric learning to drive product decisions.

This data may be collected using any number of techniques (such as ethnographic field research, field deployments of prototypes, surveys, lab studies and usability research, testing at scale using AB testing, etc.) Such grounded and carefully gathered user data can drive your decisions, and is a less risky prospect than relying on hunches from individual executives working from "gut feeling". An early paper that focused on AB testing published in 2007 by Ron Kohavi, Randal Henne and Dan Sommerfield entitled "Practical Guide to Controlled Expriements on the Web: Listen to Your Customers not to the HIPPO"[1], addressed this issue:

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*"Many organizations have strong managers who have strong opinions, but lack data, so we started to use the term HiPPO, which stands for Highest Paid Person's Opinion, as a way to remind everyone that success really depends on the users' perceptions."*

If you are trying to shift into a data informed framework, it will be critical to look at the way product and design decisions were made previously made. If these decisions were largely in the hands of one or two individuals then it's worth taking the time to make sure that they can understand and recognize the value of bringing in user/customer data into the decision making process because in the end, they may find that their weight is diminished (as is the "weight" of any individual opinion). This is a good point to check with yourself as well – are *you* comfortable and willing to see how depending more on data will change the weight of your own opinion within the design and product development process?

**Breadth: beyond design and product**

In addition to getting all levels of an organization on board with a data informed approach, it can be just as important for teams outside of product and design to have a basic understanding of a data informed framework and how it's being employed. Company cultures that embrace transparency are company cultures that encourage participation and engagement from their staff.

Sharing well-summarised data will engage parts of the organization that are not normally part of the design & product development process and make them feel like they have a closer affinity with how the product is shaped. If people in organizations beyond product and design feel like they can empathize with your users, then they can also feel empowered as part of this process. A carefully articulated data and design framework is something that many people beyond product and design can understand. By being more transparent with the rest of the company about how product and design decisions are being made (and especially in product and design driven companies), you can build broader support within the company for the decisions that are being made.

There is another positive side effect of having your data informed approach being broadly understood. It may initially seem like it's superfluous to have teams like recruiting, HR, sales, or finance fundamentally understand a data driven approach. However, it is always helpful to have any team that you work with in any capacity understand how you do your work. Having recruiting and HR understand the company's engagement with data helps with attracting, attaining and retaining top talent, something we will turn to later in this chapter. When product development teams understand what questions are being posed by different parts of the company and how those questions are prioritized and then answered through data helps staff understand the various aspects of the business. This, in turn empowers them further in the idea generation stage and better aligned around product and business success. Imagine the sales executive who feels that they know exactly what you need to build into your product but may be overly swayed by a key vocal client. If that sales executive understands that you build product by looking at the data, then they realize that they need to start to articulate their arguments into the same framework - and it helps to get you and them aligned with what you are building, why you are building it and what impact you think it will have on your overall user base.

There is a difference between using data to make and inform decisions in one part of an organization (e.g. business strategy) and having it be universally embraced by the entire organization. To get this level of understanding throughout the company, using data has to be something that you actively share within all parts of the company and has to be

something that is talked about and participated in broadly (e.g. in company all hands meetings and other public forums).

**Principle #2**

> Create a dialog, set expectations, establish a shared vocabulary and lay the foundations for engaged and transparent conversations about systematic data collection.

It is important to make sure that the people in your organization understand at least superficially what's involved and that they are essential to the process when it comes to leveraging user data effectively. If a process isn't already established in a company there will always be some level of skepticism around something new. You might find that there are people who will say "Yes! We should definitely start to take a data informed approach to design, but we shouldn't do X, Y and Z" or that what they think it means to be data informed, might be something very specific (like only AB testing) and that they aren't considering the bigger picture where different kinds of data collection and analysis fit together to answer strategically important questions.

**Establishing a knowledge baseline**

Therefore, having decided you want to enroll the company around data capture, analysis and consumption, you will need to create a dialog. Find out what people really do know and don't know about taking a data informed approach to design. Some people may understand user research, but have much less experience with AB testing (or vice versa). Find out what the biases and assumptions are about data informed design and do this at all levels of the organization (from CEO to individual designer or product manager). Having all of this understanding up front about what people think and know can really save a lot of time in the long run: You'll be able to assess where you might want to focus initially in terms of establishing best practices and you'll also become aware of any challenges you might face as you try to get a data informed design process established.

Once you've established what the knowledge level is, where there is deep knowledge and where there are opportunities for teaching, learning and sharing, then explicitly talk about what practices you want to establish and why. Getting your team and others that you work with to agree to try out some of these things that might be new to them will be important if they're not familiar with some of these tactics. It's always good to set expectations for what you will do and what you expect to see as a result, so saying "I'd like to take an extra few days on this to make sure we have time for user feedback on how usable this flow is." Makes it clear that the cost will be a little more time to introduce something new and *what level of results you hope to get from it*. Be clear about what method you will be using to answer which questions and why; too often A/B tests are used to answer questions that would have been better suited small-N, lab –based usability research - or vice versa. This leads to inappropriate negative evaluations of good methods. As we have shown in previous chapters, literacy in data collection and analysis methods of all kinds means you can create a clear rationale, set appropriate expectations and offset negative reactions and loss of trust. Data ignorance fuels data reticence.

**Establishing a common vocabulary**

A key part of establishing a shared set of values is the language that you use. Think about the words that you most often hear at your company. What are the words and phrases that are unique to your company? Which acronyms have you created and embraced? When you first joined what were the things that stood out to you as unique? Now think about how those words and phrases help to set a tone for how business is conducted within the company and how usage of certain phrases make you feel like you're part of an "in-group" or "in the know". To make a data informed decision-making framework is universally embraced, it's then important to actually have a common vocabulary and way of speaking about it.

You'll find that a common vocabulary will help in a number of ways, from making brainstorms more effective to making debate over product and design decisions even more rich because you'll have a shorthand for the things that are most important to the discussion. Seemingly simple questions that can get asked over and over again, "How do we know X?", "How are we going to measure Y?", "How do you expect the majority of users will react?", "What is the learning curve for this?", "What user errors or stumbling blocks do we think are reasonable or not?", "What do you expect to learn about user behavior from this design?", "What does design success look like?", "What does design failure look like?" can quickly help to train people and set expectations about the role that data can play in decision making and in strategic, grounded design iteration.

Remember though, this should be as much about having common definitions as it is about having a common vocabulary. Since a data informed environment requires a certain amount of discipline and rigor to the practice, you can't ensure consistent application of this framework if you don't also have alignment on your definitions as well as your vocabulary. Don't get too caught up in the words and acronyms (especially around metrics) such that you forget that the ultimate goal is to provide the best, the most compelling experience for your users. Find ways to actively represent the user in your definitions so that everyone recognizes that data itself does not humanize but it's how we interpret it and how it is applied and used to rationalize decisions about product design and product quality that can be dehumanizing.

Key phrases and vocabulary for a data-aware approach have been defined throughout the book, and these include terms like:

- Design Space
- Hypothesis - by stating "my hypothesis is..." it helps to place your idea within the context of everyone else's ideas. Calling it a "hypothesis" reminds you that it hasn't been proven yet and that it needs to be tested. Hypothesis also has the added benefit of sounding more scientific, making people less attached to their ideas and therefore more open to testing them and being proven wrong.
- Statistically significant - a great shorthand for knowing whether or not you should act on the results from your test. You can always refer back to whether or not the results were "statistically significant".
- Variables
- Measures

- Metrics - We've spent some time in this book pointing you to the fact that the right user (rather than business bottom-line) metrics for your company need to be designed. We have also spent some time identifying the difference between core, proxy and secondary metrics. For the purpose of this section, "metrics" is a key part of the data informed vocabulary because the metrics that you use and measure represents how you measure success. Clear understanding and agreement on how you are defining metrics (at the company level and at the project level) will ultimately be an indicator of how aligned you are on any given project or discussion and can therefore play a significant role in how effective your discussions are. You might find that you start to use questions like "is this change really going to *move the metrics*?" to ask if you're really investing your time into a project that will have a measurable impact on your users. Questions like "which metrics do you think this will affect?" can help you to make sure you're looking to impact the right level of user behavior.
- Validity
- Reliability
- Soundness
- Replication/reproduceable
- Confound
- Certainty
- Ecological validity

In reality, the vocabulary itself may not be as important, it's really more about consistent usage of this vocabulary that helps to reinforce a specific mindset and a way of thinking. Like working in any company, the vocabulary can help to shape the culture. What are the words that are already part of your company culture that you can adopt to support a data informed approach?

## <Sidebar: Vocabulary>

**Principles #3 and #4**

> **Create alignment**, and **locate and establish allies and co-partners across company function and build a team** through strategic hiring to reflect, amplify and grow the above…

People matter. Look inside your company, seek out sympathetic and curious others, recruit allies through conversation, question asking and engaging in their processes. Invite colleagues to be pilots for studies and to comment on designs and plans. Small "pilot groups" are invaluable. If your company or organization has not been data aware historically, and/or has engaged in a data informed design practice before, you're likely to find that there are some folks who are eager to try something new and others who will have more resistance to it or not want to be bothered with the hassle of adopting a new

practice. Generally, finding a few allies who are willing to try something out with you and who are also going to be more forgiving in the initial stages when you are likely to make a lot of mistakes can be really helpful. This will give you a chance to work out any kinks in the process with a small group of supportive people and then have more confidence as you try to roll it out to other designers or teams.

To find a good "pilot" project, there are a couple of characteristics to consider. Find something small so that you can ideally get a "quick win" and share the positive results of using data informed design to others. If the first project you pick to use data informed design takes you a few months just to establish what data you're looking for or to do the analysis on the results, it's very unlikely that you'll get a lot of enthusiasm from others to adopt something new. Find a project which has well defined success metrics. This will make it easier for you to explain what you've learned or not by applying a data informed process. A project that allows you to do a couple of quick iterations can also be good because it can demonstrate a data informed process over a couple of cycles. We really try to encourage using data to do more than "just optimization" but when you're establishing the practice for the first time – these kinds of projects are perfect for warming up the larger organization to the concept of data informed design and to build confidence in adopting a new framework for design.

Finally a note on "allies". As mentioned above, some people will be naturally drawn to a data informed approach and others will not. The best allies exist in other teams. Having many different voices who can advocate for a data informed process is very powerful. Some of the best advocates are in analytics teams and in marketing. Seeking support from the broader organization helps to make this more than "just a design thing" and helps to elevate it to the level of a company wide initiative. This also helps with the "universally accepted" aspect of culture we discussed earlier.

## <Sidebar: Establishing a new function>

In addition to gaining internal allies and collaborators, new people matter. The people you hire play a huge role in the success of your team. Building a team to work effectively with data informed design requires hiring a certain kind of profile. There are several qualities that are central to creating a strong team to drive a data aware design team and a data informed design practice in your organization:

1. fundamental design skills – the best designers know how to interpret a difficult problem and create a solution that addresses it. They can also articulate and justify the reasoning behind their design decisions. It's no different working in a data aware environment. The best designers in a data aware environment will leverage these fundamental design skills to address and articulate user problems and needs that will often be identified and measured using data.
2. a passion for driving a successful business that is also consumer/user-centered. Ideally the people you hire will have a passion and curiosity about the business you're in. To build a data aware design environment, it becomes even more important for people to have a certain level of business passion and desire to contribute to strategic thinking about the business. This is because it all ties back to being able to create hypotheses that have the intent of moving the measures metrics you use to measure your business by. If the designers and

product managers who are tasked with building the business solutions don't have a baseline level of passion for the business bottom-line measures and metrics, if they are happier being tasked and "throwing designs over the wall", then they will be unhappy in the environment you are creating.

3. an affinity for understanding, generalizing and being able to replicate design success and drive consistent user centered design and product excellence. Being programmatic and systematic through data is about understanding and being able to derive general principles and being able to replicate your results and to derive general principles. Even if results cannot be replicated for good data reasons, it is important that general principles are extracted that could be applicable to adjacent or downstream projects.

4. a desire to engage with and learn about the scientific method and develop some skill or affinity for mathematics. It is true that having some basic understanding of statistics and analysis can make a big difference in whether or not an individual can succeed in a data-aware design environment. You don't need to be great at it, but it's important to have some basic level of math is just so that you can have conversations with the folks that are doing the analysis of your work. You need to be able to question how the success of your work is being measured and you need to have an appreciation for it. Without some fundamental understanding of the theory behind many of the techniques in a data informed environment, you won't be able to engage in the more strategic conversations.

5. an ability to be open-minded, iterative and engaged but not enslaved by initial design inspirations. There are many kinds of designers that exist in companies and all types of designers can be successful in their careers. For some designers, a healthy ego and a deep belief in the fundamental "rightness" of their designs is a necessary and positive characteristic as it can sometimes give designers the confidence and ability to convince others of their vision and to sell them on that. Ego is a necessary component for creativity to survive. In a data aware, experimental, iterative design environment, over attachment to designs that can result from ego can get in the way of success. This is because as part of a data informed organization you often have to be willing to let the user and usage data make the decisions. Just as the common phrase applied to authors – that they have to be the "murderers of their children" – may be true, the same is true for designers. Letting go can be hard but may be necessary.

6. an ability to be very focused on results as well as production. Especially in the AB testing part of data informed design, it can be easy to get distracted with different options and test cells and variations. By having a certain amount of focus and discipline, your staff will be better equipped to resist the urge to fall into the various pitfalls of AB testing around making a decision too early or building out too many test cells.

You don't always need to hire people who have actually had experience in doing data informed design, but you at least need to find people that seem to have an affinity for working within that framework. If the folks that you hire aren't fundamentally open to the concept of data driven design then it can make it very difficult for them to be successful in the team. This of course doesn't mean that they are "bad" designers, it just means that they would probably be more effective (and more appreciated by their peers) in a different environment. As we mention throughout the book, there are many ways to

do design and to build product. What fundamentally determines the success of design or product is finding the right fit between the individuals, organization and the processes that you use to get there.

# <Sidebar: accepting data>

**Principle #5**

- Articulate the long term benefits and the ability to do effective pattern finding across different kinds of data set by **establishing a disciplined and consistent approach to leveraging data** that is programmatic, flexible and not rigid …..*by*

One of the aspects of creating a shared culture around user centered data is to be programmatic about your data collection and sharing. What does this mean? We have already talked about crafting a careful and consistent. Beyond this though you need to create a framework for sharing results. The more you can create a set of data sharing formats and practices the more people will sign up. For example, create a consistent look and feel to your reports. Create a carefully managed repository of reports where people can seek information as they need it. Create a rhythm for data sharing. Use physical space to showcase results as they come in. Create what social scientist Nina Wakeford calls "atmospheres" around the presentation of your data so that you can help others understand and interpret their significance, and so that they can work to make the connection to what the data suggest are actionable next steps. By careful management of results over time you can avoid ephemerality and you can avoid the constant redoing of work and the constant "reinvention of the wheel". Systematic record keeping and sharing in common formats makes your message potential stronger, and makes the business stronger. We advocate putting considerable effort into your "data hygeine".

**Revisiting Data**

One of the main reasons people consider adopting a data informed design approach is that it can save you a lot of time in learning something about your product before you release it. You can learn a lot from past internal examples as well as by looking externally at what other companies are sharing about their learnings.

As data informed design is becoming an established process, we've found that an effective technique is to take past projects and then retrospectively look at the data using a data informed framework. Of course this may not always be possible, because you may not have had all the proper tracking in place but many times the basic metrics will be tracked and available. You can look at old projects and see if there was any way of looking at the data ahead of time that might have affected the decisions you made on the project. Often the data is available to but the team just wasn't considering it.

This might be especially effective on projects where the outcome wasn't what you were expecting. For example, was there a project where you were hoping to see a big lift in acquisition and it didn't happen? Going back to the data, was there anything you could have looked at prior to making those changes that might have given you a hint as to the fact that it wasn't going to be successful? How can you build that knowledge into future tests? Or perhaps your users reacted very badly to a new feature you launched but really

thought was going to make them happy… applying some survey techniques or user research in these instances (even though the feature has already been launched) will give you insight into what your users might have been able to tell you ahead of time if you had done this work pre-launch. When you can share these kind of insights back to the team (even if it does feel "too late") it makes people that much more enthusiastic to incorporate a data informed approach earlier in the process the next time.

Another best practice which is especially effective with respect to AB testing is to keep track of which cells you (and your team) think will "win" and then comparing it to what actually happens. To cast your "vote" ahead of launching a test, ask all the members of the team to write down what they think the results will be and why they think those results will happen. When you get the actual results and can compare it with the votes that were cast prior to the test being launched then it gives you a chance to see how well you and your team were actually able to predict the impact to users.

Over time, it's always interesting to keep track of who in the team has the "best" product instincts. There's of course a danger in this tactic in that it can create a competitive environment, but the trick is to make it more about learning together and keeping each other honest.

**Developing a rhythm around data sharing**

Finally you might find that there are some very easy ways to set up a rhythm around data. There may be other things that you can look to piggy back on to set up an expectation within your team about good habits that you can make part of a recurring rhythm.

For example, rather than setting up user research as needed, you could set up a monthly user research session which either focuses on your baseline experience or that gets filled with whatever happens to be going on that week. You might also consider sending out a monthly update with insights from the various projects that you've been doing. By starting to set up expectations that data will be collected on a regular basis or looking to create dashboards that show how metrics might be changing over time given changes that you are making to the product, you can start to establish a working rhythm in your organization around data.

## <Sidebar: Developing rhythm>

As you begin applying a data informed framework, there's no way to just turn it "on" so you'll start with selectively. However, your goal should be to make data aware design a consistent part of product development. To do that, it will require discipline and vigilance. This is probably true of any decision-making platform, but if you're going to take a data informed approach to product and design it's important to not apply this framework selectively.

Fundamentally, taking a data informed approach to design is about trying to make decisions about your product and for your customers using as much information as possible along the way. It's about trying to mitigate the subjective aspects of product development by incorporating data from your customers into the process. It's therefore almost inherent to the nature of a data informed design process that you need to apply it

consistently across all projects for it to work. We've seen that using data inconsistently within an organization can often cause confusion or skepticism about the larger process.

One of the critiques that we've heard about using data inconsistently is that the data is only used when it supports the opinion of the person who's making the decision. This can definitely happen in organizations and as many of us might know from lab courses in college or high school, there are often ways to "fudge" the data or read it in a way that makes it support the outcome you're looking for. As you're trying to establish the value of data informed design, it's even more critical that they way you leverage and interpret data is such that it reinforces the objective value that it brings. As a designer or product manager working in this environment, you might find that there can be a dose of skepticism around which cells are being tested and why. Therefore, it becomes important to treat all projects with the same amount of rigor across the board. Crafting solutions and making decisions in absence of data and user feedback should become the exception and when you do make those decisions without testing or user feedback you'll want to be able to articulate and defend why that was the case.

Especially when you are trying to establish the methodology of data informed design, it can be important to showing how you consistently hold yourself accountable to the methodology of data informed design, but ask others to hold you accountable as well. This goes back to the first two points about having data informed design be universally embraced and having a common vocabulary. If you have those two things in place, then your whole company will be helping to keep you and your team accountable as well.

**Principle # 6**

- Create a **learning organization** to ensure you perennially **grow your knowledge base.**

Data aware design environments work best when they are seen as part of an overall company culture that encourages learning. Many companies are focusing on creating "learning environments" where there is a focus on building individual skills as well as encouraging development. Data aware design lends itself to this environment because one of the core attitudes that you need to have about using a data informed framework is to recognize that you are constantly trying to build up and add to your knowledge about your customer's behavior. Using a data informed approach is fundamentally about "honing your consumer instinct". This is an ongoing activity and every project is an opportunity to get better at developing that instinct through learning, information and data.

There are some very practical habits and best practices that can really help to support this culture. Some things that we've seen be especially effective are:

- Sharing results and information broadly
- Keeping sharp on both theory and practice
- Self awareness/evaluation

**Share broadly**

If you are actively using a data informed design framework, one of the best things that you can do for your company is to broadly share the results and to give everyone access

to the data. In a data informed environment it becomes even more important that designers understand how their designs are being judged and performing. Designers are often very engaged with user research (which we also classify or include as part of the "data informed" framework because the design is still in progress and user research is often more integrated into the design process). However, there are many places where once the design is done, the designer disengages from the product development process and doesn't stay as engaged with the results post launch.

Designers need to get the results from any AB tests that are conducted over their designs. Getting access to this data is a key shift in their ability to become more strategic. Understanding (even if only at a high level) how to analyze this data and how to then use that data to make informed decisions about what to design (and test) next is a key skill.

Habitual sharing/context setting/broad communication, company-wide, of test results - reinforces that most decisions are influenced by data. It also helps folks to build up shared knowledge about what works and what doesn't work. All this testing doesn't really get you much further if you're only using it to make decisions on a micro level. What should be happening is really taking away learning from these smaller instances and then using them to hone your instincts about your users over time. The best way to do this is to vet it with your peers and to subject your testing to debate and discussion.

**Theory and practice**

It is useful not only to share the results of ongoing work, but to also recognize that operating in a data informed environment can be new for a number of people. Sharing results from ongoing work means that you're sharing knowledge and insights which helps people develop a better understanding when it comes to your particular product or project, but it can also be helpful to make sure that people who have less experience with data informed design have an opportunity to build a good foundation about the practice itself.

Discussions and debate around more general topics and "theory" of data informed design can be very helpful to make sure that everyone has a common foundation. Topics might include everything from how to pick the right technique for different kinds of projects, the pros and cons of different methodologies, or even details on how to pick a statistically significant cell size or what a p-value is. The number and level of discussions that you have on these best practices will be determined by how mature the organization is with respect to data informed design. If everyone can have a common baseline of knowledge on the theory behind the practice of data informed design you'll find that your discussions on actual projects will be much richer and much more efficient. You'll also hopefully avoid some of the pitfalls of not using the data properly (and therefore being more likely to subjective or mis-interpretation). You'll find plenty of potential topics for these "theory" discussions from some of the earlier chapters in this book.

**Self awareness/evaluation**

As we've mentioned before, one of the biggest benefits of a data informed approach to design is that it gives you a great tool to use to hone your consumer instinct over time. If part of the culture of data informed design is about transparency and a more objective evaluation of your work via the data then as we've hinted before accountability to holding everyone to a similar standard is important. It's really helpful to create an environment where you can encourage self-evaluation and to not be afraid of making

mistakes and building out ideas that don't actually "move the needle", that is positively impact the business bottom line by increasing one of the established success metrics (e.g. user retention or engagement, revenue, etc)… so long as you are keeping track of them and then learning from those experiences.

We've discussed keeping track of track records as a good way to see how you're actually doing. Being self aware of when your instinct has differed from what has been reflected in the data is one of the fastest ways of improving and if you're in a culture where sharing data and results is very common, then you should have a lot of tools available for you to evaluate yourself. In the next chapter we will address some of the pitfalls of being in a data informed environment if you DON'T hold yourself accountable to your decisions and if you don't do this constant self evaluation. For example, "over-testing" can actually be a side effect of not having a strong enough instinct for what are the right things to test. Developing a good instinct for what will give you the best return on your resources investment (your "ROI") will actually come from constant viligence and self-evaluation as to how well your team is operating and how well your instincts are validated by data. Not only should this be applied to the individual, but to the organization overall and it's best if you can explicitly think about fine tuning and improving your collective understanding about your customers.

**Ongoing education and establishing a rhythm around data**

As we've mentioned before, creating an environment where it's clear that ongoing learning is supported can be one of the most effective tools to getting traction for a framework like data informed design. This is best done through a series of ongoing meetings, forums and occasional talks.

**Lectures** – this might be more applicable to larger teams - introducing a topic to a broad audience (say a mix of tech, product and design) can be an effective way to plant some of the seeds of data informed design with that group. Lectures are good for:

- Introduction of company wide metrics
- Overview of best practices and introduction to data informed design processes
- Overview of different methods and techniques and when to use them

However, lectures can't be the only means of introducing a new framework to an organization. Lectures are ofen most useful for offering an introduction or overview. Follow-up discussions with active project teams at the right time in their process are essential. So, while it's good to use an all-hands or team meeting to talk about the ways that you might leverage early stage user research, it won't really feel concrete or useful until you can find a team that is actually at a stage in their project where they can leverage early stage research and speak directly to what techniques make sense for them at that point in time.

**Project review meetings**

One of the most effective meetings for sharing knowledge is a recurring project review meeting. This might be an ongoing meeting between a broad set of product managers and designers to review a number of topics around ongoing work. The key is when you invite people that may not normally work day-to-day with each other. Such meetings provide an opportunity to share what they are learning in each of their areas to the broader organization and it helps generally with building up that shared knowledge base of what

is working and what doesn't work when it comes to your users. You might break this meeting into two sections:

1) Ongoing or upcoming work
2) Results from launched projects

The meeting should encourage a lot of discussion and debate about the projects that are being shared and it should feel more like a working meeting where everyone is vetting what is being presented. Presenters should leave the room feeling more confident about the approach that they are taking and perhaps have some new insights as well. To get you started here are some of the kinds of things you might present and discuss.

On ongoing or upcoming projects your discussion might include the following:

- Hypothesis
    - What is the hypothesis?
    - Background for what generated the hypothesis and any prior work/data/research that influenced it.
    - Does it resonate and contribute to the overall product goals? More specifically, is the hypothesis valid?
- Success metrics
    - What are the success metrics? How were they derived?
    - Are they right ones? Will these really measure the validity of the hypothesis?
    - What other things might you measure or use to measure success?
- Methodology
    - What techniques are you using to collect data for this project? (e.g. user research, AB testing, etc.)
    - What do you hope to learn?
    - Are there other methods that could reveal better data? Would some form of data triangulation give you deeper insights?
    - To what extent were methods chosen as a result of extraneous constraints (e.g., time constraints)?
    - Given an infinite amount of time, what would the ideal method(s) be?
- Design
    - How effective is the design at reflecting the hypothesis or variations of that hypothesis?
    - How does the design support what you want to learn from this project?
        - Note: This meeting will be different from a design review where you might be looking at consistency within your design language, etc. and giving more pure design feedback. Those meetings are still useful, but probably a separate meeting from this one.

For projects that have launched and where you are reviewing results, discussion might revolve around the following:

- Summary of methodology
    - What methods were used and why? What other methods were considered? Why were they not selected?
    - How effective were the methods used at getting the insights that were sought?
- Results and analysis
    - Was the hypothesis proven? Why or why not?
    - What did the team learn and what can be applied to other work that is going on?
    - Did the results support any other larger trends that you might have seen before?
    - How do these results compare to prior work?
    - What are the next steps?

By reviewing the work that is done in this manner on a regular basis, people can actively learn about what works and doesn't work. It also encourages people to ask questions and discuss, thereby learning together and actively learning while doing. When the organization is newer to data informed design, having a meeting like this is a good way for the few who might be more comfortable with the concepts to teach those who are less familiar. When the organization is more mature at using data informed methodologies, then the discussion can stimulate further learning and perhaps even innovation in methods and analyses.

We advocate subscribing to user testing and design related blogs and services, and doing regular searched for slide-decks and white papers online. Although results fro other companies may not always be transferrable to your company, garnering an understanding of what other companies have learned can be a good way to stimulate creative ways to look at your own product(s) and your own practices. Looking to what may already be written or shared can be a great way to pre-inform or to accelerate acceptance for adopting a data informed design process in your company. For example, you might be considering creating a side navigation system, but an article from Next Web suggests side drawer navigation reduces user engagement. [2] Sharing this data back to your team should could motivate running a test on your own navigational system.

Through these techniques you can establish your own internal process of data informed design and ultimately build up your own knowledge base of things that work best for your company and your product.

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[2] http://thenextweb.com/dd/2014/04/08/ux-designers-side-drawer-navigation-costing-half-user-engagement/

## Conclusions/Questions to ask yourself

As you set this up, we also advocate you think through:

- What are the things that will be challenges for you as an individual to change?
- What are some of the things that will be challenging for your organization or team in a move to a more data aware approach to design?
- How does your organization currently communicate?
    - Who initiates user testing?
    - Who "owns" the results?
- Who do you already have in your organization that might prove helpful for you to pair with as you try to establish these practices?
- What resources including skills do you and your team currently have in place and what do you need to acquire, create and/or develop?
- What existing habits and cultural aspects are already in place that might make a good foundation upon which to build a culture of data informed design and decision making?

As we mentioned when we started this chapter, culture is really something that is unique to every organization and we would never dictate what the right solution might be for you. You may want to take some of the practical things we've suggested and put them in place right away. You will find that some of them will work well and endure, whereas others will not get traction or will require considerable perseverance to establish.

In keeping with our theme of data aware design, we've always taken an experimental approach to organizational processes too. We advise you to do the same. Try things out get feedback from "users" (which may mean teams) as to which things are effective, valuable and valued and for what reasons, and which are not. See if you can create ways to measure your success, to measure what works and why. In the case of a cultural transformation, these measures will not be as clear cut as a simple data pull of the number of users on your site to reflect "retention" or "acquisition", but you can find other ways to measure your success. Ask yourself: How well has your "common vocabulary" taken hold? Are people using the terms you have introduced in meetings and in company correspondence in email, messaging and announcements? Are people actively asking to bring data into the design and product development cycle? Has your time spent "selling" the idea reduced? Are your outreach activities meeting with more positive responses? How much does data informed design get attributed for the success of your product and how much is it referred to by other organizations in your company?

Throughout this book we emphasise patience, persistence, resilience and tenacity. It will take a while to see the fruits of your labor paying off (or not). It can take anywhere upwards of 6 months to really see a change in the mindset of an organization take effect. The length of time depends on the organization and the business you are in. It will depend on the size of the organization. Aim for some small successes to start and build from those. Establish, share and monitor your success metrics. With time, iteration specification and allies, you'll find that data informed design really does have a positive effect not just on how you build your products, but on your culture as well.

## Summary

If you really want to be effective at integrating any kind of framework into your company, you'll want it in your DNA/Culture. It's a hundred times easier to adopt something when the culture supports it … and that's why the success of a data informed framework is really going to depend on the culture at your company.

If you're interested enough in creating a lasting and deep culture around using a data aware framework for design in your organization so you can make *grounded, user-centered product decisions*, you'll also invest some time in building up a culture which can support it with the right processes as well as the right people. Even if your company has the mechanics in place to embrace data as part of the decision making process, it's equally important that you have a culture that supports it as well. With respect to data, there are a handful of tactics that we've seen work really well at different companies and that are really important have as part of the company DNA. Some of these tactics apply to carving out or transforming individual roles and responsibilities, some are more directed at establishing collaborations and support from recruiting groups and teams.

We advocate the following to make this possible:

- Aim for **shared understanding** of the value of user centered as a company **universal…** *which requires you to*
- Lay the foundations for engaged and transparent conversations about systematic data collection. You need to **create a dialogue, set expectations and** develop a **common vocabulary** *….in order to….*
- **Create alignment**, and **locate and establish allies and co-partners across company functions***….and….*
- **Build a team** through strategic hiring to reflect, amplify and grow the above*…..and*
- Articulate the long term benefits and the ability to do effective pattern finding across different kinds of data set by **establishing a disciplined and consistent approach to leveraging data** that is programmatic, flexible and not rigid …..*by* Creating a **learning organization** to ensure you perennially **grow your knowledge base.**

In the next chapter, we will turn to some pitfalls of uncritically **over**investing your faith in a data driven approach. Part of being data informed and data aware is knowing what can go horribly wrong.

## Additional resources

Content

O'REILLY®

*"The Design Sprint described in this book evolved from within Google and I've seen it work miracles. This book is an excellent resource in learning how to do it yourself."*

— Scott Jenson, Product Lead at Google

# design sprint


Richard Banfield

C.Todd Lombardo

Trace Wax

with a foreword by Dave Gray


A Practical Guidebook for Building Great Digital Products

Chapter 5

# Phase 1: Understand

The first day of a design sprint is primarily an opportunity to bring the working team to a mutual understanding of the problem to be solved. If the team members haven't already met one another, then this is the time when everyone will get acquainted. Getting to know each other helps to develop empathy, which is a cornerstone of any design-thinking exercise. In this chapter, we'll give you tools and exercises to help break the ice and inject a little fun into the process. These exercises will also help you get inspired. Whether you need to be inspired by facts or out-of-the-box ideas, we've included a collection of tools to get you there. Together you'll answer the questions: "Who is the customer, who is the user, and what are their problems?" You'll all share the relevant context so the answers to these questions can be understood clearly, but you won't need to come up with solutions yet.

## What Happens During the Understand Phase?

| | |
|---|---|
| **Get the Background** | ~1.5 hours |
| **Get Inspired** | ~1.5 hour |
| **Define the Problem** | ~1 hour |
| **Know the User** | ~3 hours |

As discussed in Chapter 4, a design sprint is a flexible framework, and you'll need to adapt it to your particular situation. If the conversation requires it, exercises can be added, reordered, skipped, shortened, or extended. Your mileage may vary on the duration for each of the exercises; we've done journey maps in 15 minutes, and some have taken up to three hours. It all depends on the level of detail your project needs.

Whatever you do, don't forget to take frequent breaks and get a good lunch! (Yum.)

You might not finish these exercises by the end of the first day. In that case, do the retrospective at the end of the day, then continue the exercises on the second day. If that happens, be sensitive to the time constraints to finish up the background work so that you have enough time for the additional phases of the design sprint.

## Recommended Agenda

**Get the Background**

| | |
|---|---|
| Introductions | ~15 minutes |
| Introduce the Idea Parking Lot | ~ 5 minutes |
| Review Agenda | ~ 5 minutes |
| Rules of the Design Sprint | ~ 5 minutes |
| Pitch Practice #1 | ~10 minutes |
| Review Research and Past Work | ~60 minutes |

**Get Inspired**

| | |
|---|---|
| Goals and Anti-Goals | ~30 minutes |
| Existing Product, Competitors, and Substitutes | ~40 minutes |
| Facts and Assumptions | ~20 minutes |
| Question Formulation Technique | ~15 minutes (optional) |

**Define the Problem**

| | |
|---|---|
| Problem Statement | ~30 minutes |
| Reframe the Problem with Challenge Maps | ~30 minutes (optional) |

**Know the User**

| | |
|---|---|
| Who-Do | ~10 minutes |
| Personas | ~45 minutes |
| Customer Interviews | ~60 minutes |
| User Journey Map | ~60 minutes |

**Wrap-up**

| | |
|---|---|
| Daily Retrospective | ~15 minutes |
| Team Drinks | ~60 to 90 minutes (optional) |

# Get the Background

The goal for this part of the day is to understand all the relevant data and information on hand. The team should explore what they know and what they don't know to gauge what knowledge gaps exist for the problem. You'll cover existing research done before the design sprint and review analysis of competitive or similar product offerings.

## Introductions

Give the design sprint team the opportunity to introduce themselves. Everyone should say their name and their role in the design sprint team and the project to follow. The facilitator can go first to set the stage and provide a good example, followed by the main product sponsor or stakeholder, followed by the rest of the team going around in a circle.

Depending on how familiar the team members are with each other you could include an icebreaker to get the team to open up and be comfortable working together. You'll be spending an intense few days together—might as well get the edge off up front!

**How**

1. Select your icebreaker from the list on the next page or another you know how to do already.
2. Describe your icebreaker to the group.
3. Blueprint it by going first to set the stage and give an example for everyone.
4. Pick an order and go around the room and make sure that each person completes the icebreaker.

**Difficulty:** Easy
**Size:** The whole group
**Materials:** 5 × 7 index cards to fold

**Don't** let someone talk for a long time. This is a time for simple introductions, not for people to drone on about their background and opinions

**Approximate time:** 30 to 60 seconds per participant

## A Few of Our Favorite Icebreakers

**Word Ball:** Bring a plush ball. Toss the ball to someone else in the room, and as you throw it, say a random word. Each person does the same thing in turn, until everyone's had a chance to throw the ball.

**What Neighborhood Do You Live In?:** Great for people in cities who love to talk about their 'hoods. At the end of each person's intro, each person says the neighborhood they live in. One of Trace's favorites.

**Draw Your Name and Draw _____:** Give each participant an index card and ask them to fold them in half: on one side, they should write their names in a decorative font, and something tangential and/or related to the topic of the week. For example, at a recent sprint, C. Todd asked everyone present to draw how they'd make pancakes. The manager present drew a car and an International House of Pancakes sign (he liked their blueberry syrup).

**Little-Known Fact:** Ask participants to state their name, title, and/or function, then add a fact that no one in the room likely knows about them.

**Hopes and Fears:** We learned about this one from Karen Cross at Atlassian. She uses this to help bring out potential project issues, in addition to getting others to know one another:

*"It's basically a 20-minute brainstorm exercise at the very beginning of a sprint. Everyone sits, and has two colored Post-its (usually red and blue). Depending on the number of people involved, I usually limit them to maybe three hopes and two fears, two hopes, or maybe one hope. And then everyone writes them down, and they all put them face down in the middle of the table, and then they draw from them, and then have to read someone else's and explain what they think it means. By doing that, it gets them to be empathetic [to one another]."*

After the introductions, acknowledge the others involved with the project but not participating in the design sprint.

## Introduce the Idea Parking Lot

After that, introduce the concept of the Idea Parking Lot. During the sessions, the team may generate ideas or have other "aha" moments that may not apply to the main topic, or they may propose solutions on the first day that shouldn't be explored until the Diverge phase. An Idea Parking Lot is a place where such ideas and topics can be captured, so you can come back to them when you're ready. Unlike a real parking lot (especially during the holidays), there's always room in the Idea Parking Lot!

**How**

1. Place a large piece of paper on the wall. A page from a Post-it easel pad is ideal.
2. Label it "Idea Parking Lot" at the top. Draw a picture of a car. Drawing pictures of cars is fun.
3. Throughout the sprint, when anyone has an idea you want to capture that doesn't fit the sprint, write it on a small Post-it and stick it in the Idea Parking Lot.

**Difficulty:** Easy
**Size:** The whole group
**Materials:** Post-its (you can also use a Google Doc or Trello Board)
**Approximate time:** 3–5 minutes

## Review Agenda

There's a lot to cover on the first day of the design sprint. Give the team a sense of what's to come, so they know what to expect.

**How**

1. Review the printed agenda, or bring it up on a large TV screen.
2. In about a sentence each, describe the exercises you'll be doing.

**Difficulty:** Easy
**Size:** The whole group
**Materials:** A printed agenda (or a large TV screen)

**Don't** go into too much detail.

**Approximate time:** 5 minutes

## Rules of the Design Sprint

It might seem strange to start a creative thinking process by establishing rules. This counterintuitive approach is often shunned by the uninitiated as being restrictive or dampening the creative process. This couldn't be further from the truth.

The guidelines we recommend are intended to level the playing field for all participants. Human beings are complicated enough without the additional pressure of having to solve problems while stuck in a room full of peers or strangers for five days, some of whom speak more forcefully than others. Put them all in a small space together to understand a problem, generate solutions, and make prototypes, and it can get downright chaotic. The humans involved in the design sprint phases are more than just sources for ideas and hands to make things. They bring with them their own experiences, biases, emotions, preferences, and politics. Guidelines reduce the risk of those biases and focus the team on the customer's problems. Our goal with these guidelines is to get the team to fall in love with solving the problem and not with one of their own subjective solutions.

By providing guidelines and rules for the team, you can empower the team. Again, constraints increase creativity, and these guidelines can help. You reduce the opportunity for mental fatigue and ensure that each person's contributions will be given attention and value.

One of the most important elements of a design sprint is that these are established on day 1 or even before the design sprint begins. These are not guidelines to impose on everyone in an authoritarian fashion—rather, ask the entire team to co-create them. Our recommendation is to select a few from this list (or your own!) then place blank bullet points and ask the team to help you fill them in. If no one adds any to the list, add some yourself. By adding it on the fly, you're more likely to get things moving.

**Here's a sampling of guidelines we use. What could you add to this list?**

- Everyone participates
- Have one conversation at a time
- Withhold judgment of others' ideas
- Get up and draw
- Be comfortable
- Be easy on people, tough on ideas
- Be timely
- Be present
- The phone stack
- One computer at a time
- No jargon/TPS reports
- No HiPPOS
- No "Yes, but…"

**Everyone participates.** We mean everyone. Design sprints are not for the faint of heart, nor the introvert that struggles to speak up. Rather, design sprints are intended to encourage participation by all, regardless of roles with the company or project team. There will be mechanisms to allow the quiet voices in the room to be heard, and the facilitator's role (see Chapter 4) is important in identifying who isn't participating and draw them out.

**Have one conversation at a time.** Have you ever been in a meeting and seen lots of side conversations? We don't want those in a design sprint because we believe that all comments are valuable and want everyone to hear them. This will prevent everyone from talking over one another and prevent she/he-who-speaks-loudest-wins.

**Withhold judgment of others' ideas.** This is increasingly important during the Diverge phase when participants are generating ideas. To bring forth an idea can be a courageous act, and if there is harsh judgment, it can begin to erode confidence and diminish the quality of ideas. There will be mechanisms for judging ideas and bringing the better ones forward; those are when judgment is necessary and even welcome. So hold judgment until that time arrives.

**Be comfortable.** We don't want people to feel like they have to stand up or sit down all day, so if someone is sitting and feels the need to stand, or, if they need to leave to go to the restroom, that's OK. It seems almost too obvious to call out, but it does make a difference and establishes the tone of the sprint. Take frequent breaks so everyone stays refreshed and brings their A-game.

**Be easy on people, tough on ideas.** Along the same lines as withholding judgment, we want people to feel like they can contribute. There's no better way to do that than to value what they contribute and go easy on them for doing so.

**Be timely.** Timeboxing helps force movement. Facilitators take note: this one is mostly on you. Your job is to make sure the time doesn't go over what was stated and agreed on. If you said you'd have lunch at 12:30 p.m., make sure you're breaking at 12:30 p.m. Otherwise, everyone will be looking at their watches thinking "Weren't we supposed to break for lunch now?" and they will become disengaged. And hangry.

**Be present.** A design sprint is an intense exercise and many participants will get tired and distracted. Stay in the room, listen intently, and participate actively in the conversations.

**The phone stack.** Who loves their mobile phones? Most people. Who also doesn't put them down in meetings? Most people. To keep the team focused and avoid the inevitable buzzing phone distraction, we ask everyone to pile their phones up on top of each other. This is known as the phone stack. The first person to reach for the phone might receive a small punishment, such as having to buy the next round of coffees or drinks.

**One computer at a time.** Sometimes you'll need a computer projecting on a screen to review the agenda, instructions, or materials, but everyone else should keep their computers away. Only one computer should be in use at a time. Unless necessary, refrain from using your computer during the sprint. People will use the computers to multitask and will stop paying attention to the conversation. To take notes, write them down on paper instead. Everyone will be able to listen better when they're looking at one another instead of their screens.

**No jargon/TPS reports.** Do you know what a TPS report is? Neither do we! Keep the jargon and acronyms to a minimum so everyone in the room understands. If necessary, start an acronym dictionary in the back of the room to keep track and let everyone know what "BTKO" really means.

**No HiPPOs.** The Highest Paid Person's Opinion can often trample on other people's ideas. Make this a rule so that a senior member doesn't keep junior participants from defending their own points of view.

**No "Yes, but…"** Any time the word "but" is said, it often invalidates what was said earlier, so "yes, but..." is really a disagreement. Disagreeing is OK, but preceding that disagreement with a "yes" can be subtly counterproductive. There will be times for debate and disagreement in design sprints. Or instead of disagreeing, build on the last idea by saying "Yes, and..." or "Yes, because..."

If you ever see anyone breaking these guidelines during the sprint, call them out on it. If you violate these guidelines, call yourself out. If you are called out, admit it and move on.

After reviewing the rules you'll be following over the next few days, it's time to get started! Proceed with the following exercises to begin the design sprint itself.

## Pitch Practice #1

The project sponsor should begin each day by walking the design sprint team through the business opportunity and market, and the problem you're solving as they see it.

Pitch practice makes sure that everyone is aware of the original intent of the sprint, and allows the project sponsor to practice and refine the application's elevator pitch over the week. The pitch can be modified as needed as new information, options, and decisions come to light.

**How**

1. Have the project sponsor give her elevator pitch. Use a pitch deck if one is available. Cap it to a few minutes.

2. Ensure that she covers the business opportunity, market, and the problem the team wants to solve.

3. Allow quick questions at the end, but save most of the discussion for the rest of the day's activities.

**Difficulty:** Easy
**Size:** The whole group
**Materials:** The project sponsor's brain and her pitch deck if one is available

**Don't** let the project sponsor drone on and on and on (there's a 12-step program for that called On-and-On-Anon). Keep them timeboxed!

**Approximate time:** 5–10 minutes

**Credit:** Alex Baldwin at thoughtbot, Jared Spool for the On-and-On-Anon joke


Problem
Social Determinants
(food,housing,transportation)
+ 60%
1/5th of Healthcare
Spending
60% of Health
Outcomes

## Review Research and Past Work

Following the pitch, share a deeper dive into the background and motivation for the project. Reviewing the current body of knowledge together will help to get everyone on the same page, and allow people to build upon what has come before.

**How**

1. Make it clear that what was done previously will inform the activities during the design sprint, but there will be an opportunity to take things in a different direction if it's better.
2. Have a brief discussion of the background information or research that was sent out before the sprint.
3. Go over any other materials or things people know about the problem space but haven't yet shared.
4. Review any previous initiatives, including applications or prototypes the company has made to solve a similar problem.

**Difficulty:** Easy

**Size:** The whole group

**Materials:** Presentations of past project work (if applicable); screenshots or walkthrough of product (if existing); any relevant metrics, perhaps from a business intelligence report or marketing report

**Don't** overload the team with information. Cognitive (over)load is a thing. Also don't judge or get into debates. There will be plenty of opportunity to discuss different perspectives later in the day and throughout the design sprint.

**Approximate time:** Up to 1 hour

**Credit:** The team at thoughtbot

With the guidelines established and the background material covered for this sprint, the team can seek ways of inspiration to create a fantastic product.


BUDGET
Need guidance/ advice

# Get Inspired

When considering new possibilities, you will want to know where you're starting from so you can later diverge in order to generate a multitude of options. Going into a project, it's important to understand what constitutes success. Everyone on the team arrived with their own notions of what success is. Like the North Star for ships sailing in the 1700s, understanding in detail what the goals are can help you as you search for inspiration and direction.

## Goals and Anti-Goals

In this exercise, you'll define the objectives of the project so all get on board and agree with it. This can also help define the project's guardrails.

**How**

1. Draw two columns on a whiteboard, one for the project's goals, and one for its anti-goals. Anti-goals are things that are explicitly not goals of the project.
2. Ask the team to brainstorm goals for the project. These should be high-level objectives, not features. For example, "Save $75 million per year in increased production efficiency" is a high-level objective, but "Allow users to propose savings ideas" is a feature.
3. As each goal is suggested, allow the team to discuss it and agree that it's a goal for the design sprint or following project. If it's not, move it to the anti-goals column.
4. Ask the team to similarly brainstorm the anti-goals that are not needed for the project's success.
5. Identify the top three goals. Underline the #1 goal.
6. Capture and upload the list so the team can refer to it later.

**Difficulty:** Easy

**Size:** The whole group

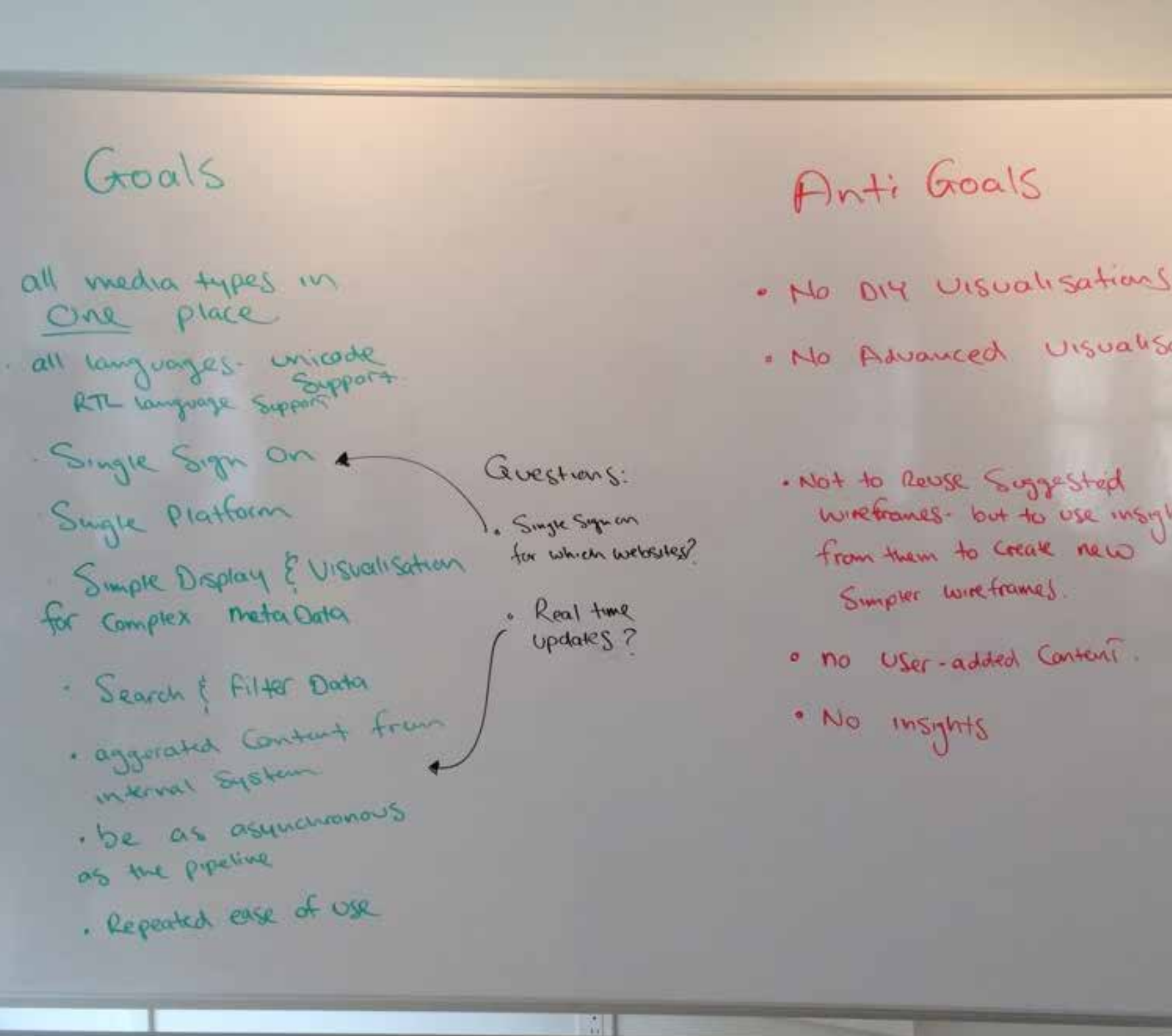
**Materials:** Whiteboard and markers

**Don't** list features, list too many goals. You'll go nuts trying to meet them all.

**Approximate time:** 30 minutes

**Credit:** Graham Siener, Pivotal Labs[1]

1 *http://blog.pivotal.io/pivotal-labs/labs/agile-inception_knowing-what-to-build-and-where-to-start*


Goals
all media types in One place
all languages- unicode support
RTL language support
Single Sign On
Single Platform
Simple Display & Visualisation for Complex Meta Data
Search & Filter Data
aggerated Content from internal System
be as asynchronous as the pipeline
Repeated ease of use
Questions:
Single Sign on for which websites?
Real time updates?
Anti Goals
No DIY Visualisations
No Advanced Visuals
Not to Reuse Suggested wireframes- but to use insigh from them to create new Simpler wireframes.
no User-added Content.
No insights

## Existing Product, Competitors, and Substitutes

As you continue to look for inspiration, it can come from an analogous solution in another industry. A competitor. An elegant solution to a different product you'd like to emulate in some way. With digital products, many solutions exist, so rather than reinvent the wheel, seek out solutions from other industries that might apply to your problem. They don't have to fit your problem exactly (remember, you're only seeking inspiration at this point). We often take a section of a wall and print out apps, screenshots, drawings, or web pages of things we find inspiring, useful, or maybe even want to replicate (or all this can be viewed online and projected onto a screen).

There's a risk of opening Pandora's box here, in that sometimes a team can get too focused on replicating what already exists, instead of solving what a user or customer really needs. Don't spend too much time on a deep dive of each of these; stick to a broad overview.

**How**

1. Sync your monitor or phone to a large TV screen. Have someone bring up your existing site or app if one already exists, and walk through it to give the participants context. Discuss what's working well and what's not working well.
2. Invite participants to identify competitive and substitute products. Bring them up on the screen, or put a printout up on the wall. Discuss the strengths and weaknesses of each. Also consider what "non-products" are used. For example, when a customer uses pencil and paper to track event participants.
3. Do the same for aspects of apps or sites from other industries. For example, an onboarding flow or data visualization you might want to replicate.
4. Take notes on the areas that are inspiring. If you've put screenshots up, have everyone stick Post-its or dot stickers next to the areas they like the most.

**Difficulty:** Easy

**Size:** The whole group

**Materials:** Printouts or displayed screens of anything that inspires the team

**Context:** This is a good generative exercise best completed at the start of the sprint.

**Don't** go too deep or spend too long.

**Approximate time:** 30–45 minutes

**Credit:** The team at thoughtbot

## Facts and Assumptions

Another way to find inspiration is to acknowledge the biases we each bring to the table, so everyone's aware of them and can overcome them when they need to. It's human to make assumptions and form biases. Just get over it: we are biased. These biases can influence our decisions, which will affect our ability to solve the right problem. Before we can solve tough problems and open new pathways, we need to escape the confines of our existing biases, break out of our mental habits, and call out the assumptions that we may have. Einstein famously observed that "You can't solve problems at the same level of thinking that created them." Pushing our brains to identify all the assumptions we have about a problem will unlock ways for us to try and solve it; facts and assumptions help to reduce your bias by identifying them.

Let's take a simple example: "I went to the supermarket yesterday and bought an apple because I was hungry." How many assumptions do you think are in that statement? More than you think. First, there's an assumption of causality: that being hungry causes the purchase of an apple. We don't know about you, but we often look in our cupboard or refrigerator first before going to the store for an apple. Second, that the supermarket has apples in it. Yes, in the United States this is common, but depending on time of year and location, it is not always true, and hence an assumption.

These same subltle assumptions and biases can haunt you if not properly identified at the start of a project.

This exercise is used to identify what data is on hand, what is still unknown, and most importantly, what assumptions the team is making. This helps to minimize confirmation bias (it *never* is eliminated) and baseline everyone in the room to understand the context of the problem at hand. This also helps to identify what knowledge gaps exist.

**How**

1. Allow participants 3–10 minutes to individually document facts and assumptions (one fact/assumption per Post-it). Use one color Post-it for facts and another color for assumptions.
2. Invite each participant to share their assumptions as they post them to a wall or display board.
3. Ask participants to rewrite any successfully challenged facts on the assumption colored Post-its.
4. Document questions that arise during the group discussion process.
5. Ask participants to approach the wall or board of facts and assumptions in pairs to work silently grouping the facts and assumptions by commonality.
6. Partway through the process, replace the categorizers with two new participants, allowing them to undo or redo any work previously done; continue to replace categorizers every few minutes until all Post-its are categorized.
7. Once half the Post-its are categorized, give the categorizers medium-sized Post-its to add category headings.

**Difficulty:** Hard

**Size:** Individuals, pairs, and the entire group

**Materials:** Sharpies, medium-sized Post-its, small Post-its in two colors

**Context:** This is a good generative exercise completed at the start of the sprint. It must be done before determining insights.

**Don't** let questionable facts go unchallenged, as they may be assumptions (anyone can challenge a fact or an assumption). Let the group jump to insights without a full exploration of the facts and assumptions.

**Example:** "9% of current customers use feature X" is a fact; "current customers don't understand how to use feature X" is an assumption.

**Approximate time:** 20–30 minutes

**Credit:** InnoLoft team at Constant Contact with inspiration from Craig Launcher of Assumption Storming

## Question Formulation Technique (QFT)

In addition to our biases, we likely have questions—lots of questions: Will this work? Is my idea as awesome as I think it is? How are users currently solving this problem? What are the best ways for your organization to solve this? A question-storming approach can be quite helpful in understanding the problem you're trying to solve. Phil McKinney, former Hewlett-Packard CTO, made himself into a question specialist for the corporate world, and argues that crafting good questions is what allows people to make innovative breakthroughs: "The challenge is that, as adults, we lose our curiosity over time. We get into ruts, we become experts in our fields or endeavors." Dan Rothstein, founder of The Right Question Institute, studies the art and science of asking questions.

*"Wielded with purpose and care, a question can become a sophisticated and potent tool to expand minds, inspire new ideas, and give us surprising power at moments when we might not believe we have any."*

Dan and his cofounder Luz Santana created the Question Formulation Technique, which was initially made for teachers to teach children the skill of asking questions. However, we have found that this also helps teams generate questions about the project and uncover some interesting opportunities.

This exercise is used to bring to the surface the questions each participant has about a particular topic. This can align teams so they all know what questions everyone has on a particular topic.

**How**

1. Provide a question focus: the area that needs exploration.
2. Inform participants about the QFT guidelines:
    a. Ask as many questions as possible.
    b. Do not stop to answer, judge, or to discuss the questions.
    c. Write down every question exactly as it is stated.
    d. Change any statement into a question.
3. Establish a time limit.
4. Post-up and sort per your preference.

**Difficulty:** Easy

**Size:** Individual and group

**Materials:** Sharpies and Post-it notes

**Context**

This is a divergent exercise, so it is best used in the beginning of a sprint. It could precede or follow Facts and Assumptions. A good follow-up exercise is to converge onto the important questions to answer by voting.

**Don't** allow questions to be answered—it can be a rat-hole in the making. Don't let this go un-timeboxed.

**Approximate time:** 5–15 minutes

**Source:** The QFT is © The Right Question Institute 2011. Used with permission: http://rightquestion.org.

By this point in the day, you know which direction to go—you're feeling inspired and you're ready to dig deeper into the problem. If someone comes to you with a problem, most people start thinking about a solution. Hopefully the questions you've generated are more about the problem and not leading to one solution or another, because as soon as you start thinking of a solution, you risk missing out on possibilities for a deeper understanding of the problem.

# Define the Problem

What's the problem you're attempting to solve? This is one of the most important aspects and sadly, it is one that's overlooked frequently by the many teams and clients we have worked with. Since most designers and engineers are trained to design and build things, the propensity to create and deliver often overpowers the desire to understand why they are creating something. You can look at the copious amount of digital products that were created and went nowhere. Let's take a look at a few examples you might have heard of.

Airtime, the face-to-face video chat web application that was launched on June 5, 2012 with quite a splash. Shawn Fanning and Sean Parker (the famous Facebook investor), who created Napster, did a number of talk-show appearances and held a launch party that any record company would envy, well, except for the glitches.[2] The result? $33M of funding with no users after 16 months of operation.[3]

What was the problem they were trying to solve for? Skype, Google Hangouts' and Apple's Facetime already had been in the market to solve these needs and Airtime offered little extra in the way of solving for another need. Had Airtime been more focused on the problem of video chat, it could have worked toward a better solution—instead they kept building and didn't pay attention.

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2 Erin Griffith, "Big Celebs, Big Ideas: The Double-Edged Sword of a Big Flashy Launch," June 5, 2012. *http://bit.ly/celeb-ideas.*

3 Milo Yiannopoulos, "There Is Literally No One Left on Sean Parker's Airtime," October 28th, 2013, *http://bit.ly/yiannopoulos.*

Facebook Home is (or was) a mobile digital product you might have tried on your Android device. We didn't. Did it even make any sense? It seemed to solve a problem for Facebook, which was keeping their users in their app, but it did not solve any real problem or need for the user. We have seen many companies start design sprints to solve their own problems rather than solve a problem for their users and/or customers.

To understand the problem you're solving for, you need to understand what information you have on hand about the current user behavior. Now that you've dug into the data and information you already have, and explored your facts, assumptions, and questions, you'll consider the problems your users have faced. Are there tangential related problems? Are there seemingly unrelated problems? The objective is to paint as complete a picture as possible to understand the context of the situation.

## Problem Statement

You can't define a good solution until you understand the problem you're solving. Defining that together gets the team on the same page and sets it as the North Star for the rest of the design sprint. This keeps ideas focused on the problem at hand, and other great ideas that solve a different problem can get added to the Idea Parking Lot.

**How**

1. Distribute large 3 × 5 Post-its and ask participants to individually write down potential problems the target user might have (one problem per Post-it). The following questions can serve as prompts:
    a. What is the job-to-be-done?[4]
    b. What is the problem that this product or service will solve?
    c. What is the motivation behind what the user wants or needs?
2. Place the Post-its on a whiteboard, grouping similar ones together, drawing lines between them as needed to indicate themes.
3. Discuss the problem statement, and agree on the general problem to be solved.
4. Refine the problem statement and finalize the wording.
5. Rewrite the problem statement in a large format on a whiteboard or big Post-it and keep it visible throughout the sprint. This will be important to reflect and revisit if the conversation veers too far from the established problem.

**Difficulty:** Medium

**Size:** The whole group

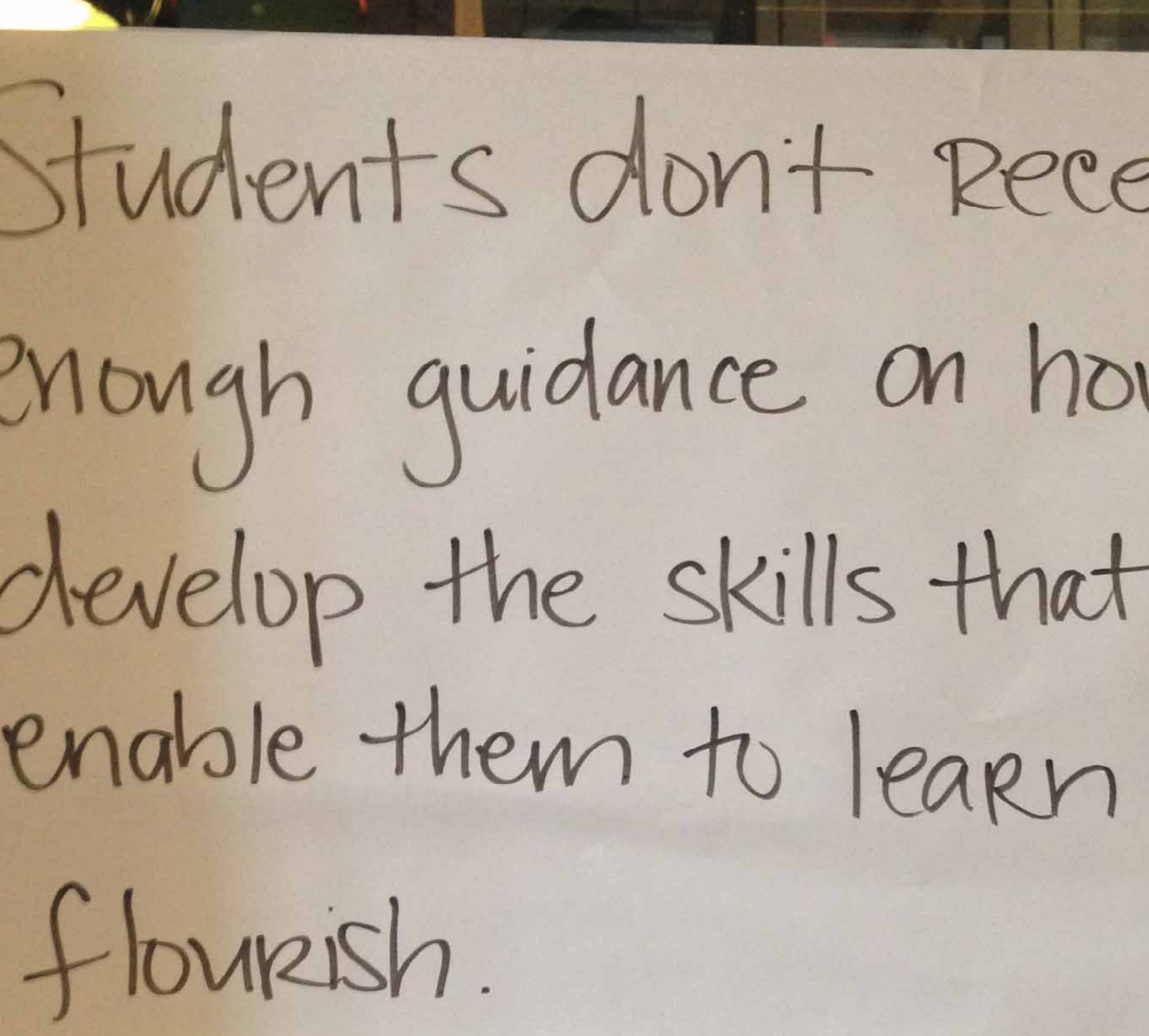
**Materials:** Whiteboard, markers, and large Post-its

**Don't** write a compound problem statement that solves all problems and tries to be all things to all people. Use conjunctions like "and" and "or" sparingly, if at all. In addition, don't try to solve the problem yet. You're just trying to understand it.

**Approximate time:** 20 minutes

**Credit:** The team at thoughtbot

4 Clayton Christensen Institute, "Jobs to Be Done," *http://www.christenseninstitute.org/key-concepts/jobs-to-be-done/.*


Students don't Rece
enough guidance on hou
develop the skills that
enable them to learn
flourish.

## Reframe the Problem with Challenge Maps

Now that we've defined the problem, how might we reframe the challenge given what we collectively know? Taking all the information in, you may realize that your initial hypothesis might be the wrong one. If so, that's great! You'll congratulate yourself as this process has worked for you. As we mentioned earlier, there are plenty of stories about products being built that no one needs nor wants.

Why reframe? Often we see organizations thinking and speaking in terms of their features and their products, not the customer or the user's eyes (the paying customer and the user may not be the same person).

For example, have you ever purchased a pair of socks? Our guess is you probably have purchased many socks over your lifetime, and they are always sold in pairs.

In 2003, Jonah Staw, a product designer at the prestigious Frog Design was joking with Arielle Eckstut about how they could solve the problem of missing socks by wearing all the surviving socks that did not match. That silly joke inspired them to start LittleMissMatched. They reframed the problem from "I have missing socks" to "I can combine and wear these leftover socks" to "None of my socks match, and that's awesome!" They sold socks in "pairs" of three that have matching color palettes but no matching design patterns. Your suit-wearing Wall Street businesswoman might not wear them, but 11-year-old girls absolutely loved it. Eleven years later, the company is reportedly grossing over $30M annually in sales.[5]

The ability to reframe a situation can lead to incredible breakthroughs, and it can also lead to small insights that you can leverage to delight your users. It all depends on

5 *http://www.startupwin.com/littlemissmatched-mismatched-socks-a-smash-hit/*

your perspective and the ability to shift perspective once you have all the context in front of your team. If you ask a team of engineers how to improve the experience of the Amtrak ride between Boston and New York City, they may offer all sorts of suggestions for improvements in the rail structures, suspensions on the train, and more comfortable seating. However, for the amount of funding it would take to implement that type of system and infrastructure, you might also be able to hire exceptional waitstaff as servers to serve top-shelf liquor and gourmet hors d'oeuvres to passengers during the trip. Rather than a shorter trip, passengers may start requesting a longer duration.[6]

This reframed the problem from a structural, smooth ride to creating an experience. The effort to improve that experience could be a much smaller implementation. These are the little details you'll want to seek out as you reframe the problem you're solving.

A technique that can help with this is to create challenge maps. A challenge map asks the questions "Why?" and "What's stopping you?" and forces you to consider the relationship between the possibilities. Once you've created a challenge map around a particular issue, you can start to see what might be blocking the way to a solution. Many times you start out in one area and learn that's not the area you need to focus on! With challenge maps, you can explore the problem you've identified and determine whether you need to restate it, reframe it, or solve a different problem altogether.

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6 From Rory Sutherland's TED talk (*http://www.wbur.org/npr/308752278/brand-over-brain).*

## Challenge Maps

**How**

1. Divide into pairs or small groups.
2. Write the Problem Statement on a large Post-it note, and place it in the center of a whiteboard or a flipchart page. Add "How Might We" (or "HMW" for short) before the text of the Post-it.
3. Challenge this initial statement by asking the group "Why should we do this?"
4. Answer that "why" question on another Post-it note and place it above the initial Post-it note. Add "How Might We" to the beginning of it. Now challenge that new statement with the same "why should we do this?" question, adding Post-its going upward. Repeat this until a natural endpoint is reached (such as "to make more money").
5. You may find there are multiple reasons, so answering "why else?" will lead you to put Post-its to the left or right of each other.
6. In the downward direction, challenge each "How might we…" statement with the question "What's stopping us from doing this?" Answer that question, then rewrite it to a "How might we..." question, and place it below that Post-it.
7. You may also find multiple reasons for what's stopping you. Place Post-it notes to the left or right answering "what else is stopping us?"
8. Continue until a natural endpoint is reached.
9. With the entire group, review the Post-its that were created and see if any of the added statements would make a more applicable Problem Statement. If so, use that Post-it note to revise the Problem Statement accordingly.

**Difficulty:** Difficult—really, this is quite difficult

**Size:** Best in pairs

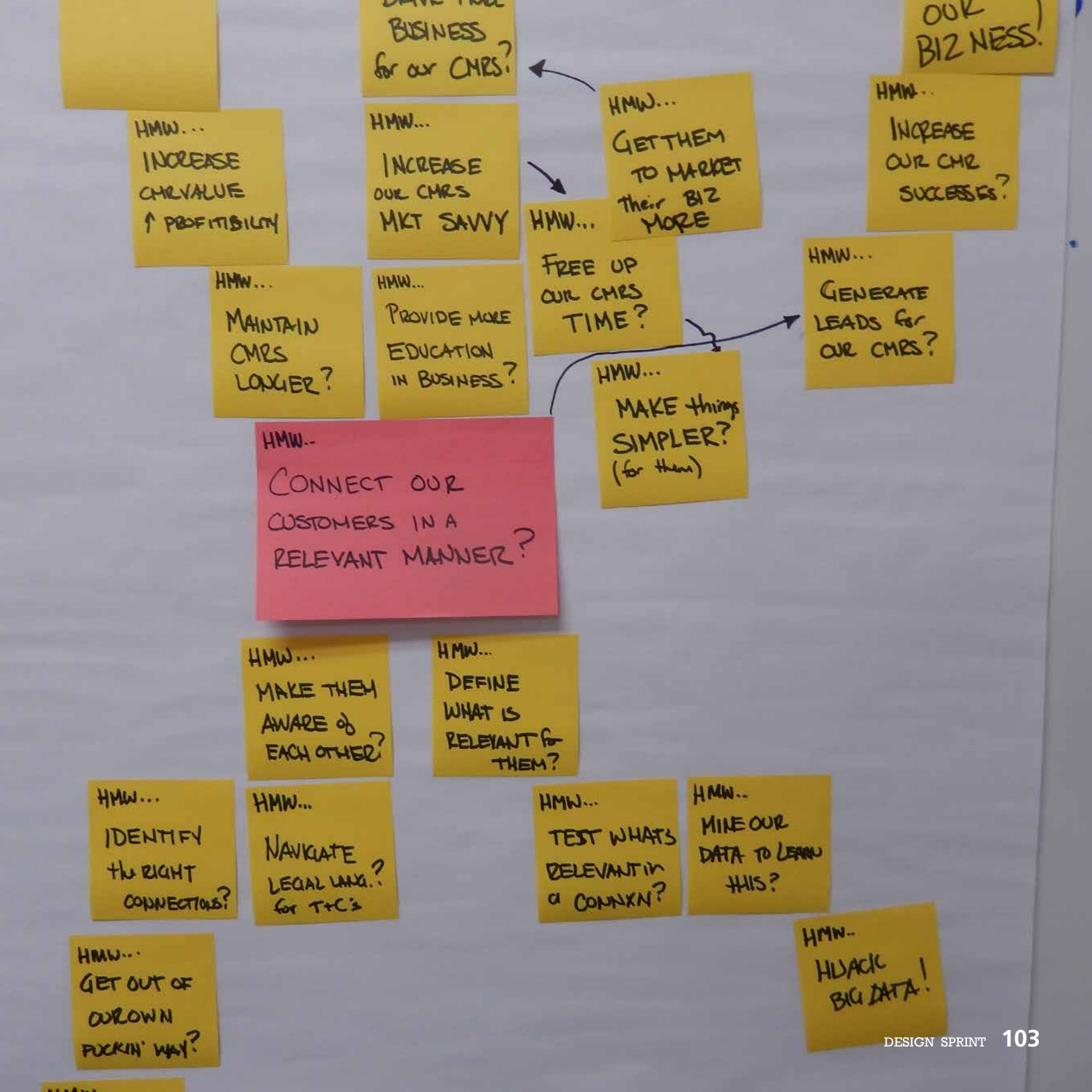
**Materials:** Flipcharts; large and small Post-its

**Don't** do this in groups of more than four people.

**Context:** Good to start before or at the beginning of the sprint to explore the problem space before attempting to solve.

**Approximate time:** 15–20 minutes to start (can take longer depending on the size and nature of the project)

**Credit:** Min Basadur


BUSINESS for our CMRS?
OUR BIZ NESS!
HMW... INCREASE CMR VALUE ↑ PROFITIBILITY
HMW... INCREASE OUR CMRS MKT SAVVY
HMW... GET THEM TO MARKET their BIZ MORE
HMW... INCREASE OUR CMR SUCCESSES?
HMW... FREE UP OUR CMRS TIME?
HMW... MAINTAIN CMRS LONGER?
HMW... PROVIDE MORE EDUCATION IN BUSINESS?
HMW... GENERATE LEADS for OUR CMRS?
HMW... MAKE things SIMPLER? (for them)
HMW.. CONNECT OUR CUSTOMERS IN A RELEVANT MANNER?
HMW... MAKE THEM AWARE of EACH OTHER?
HMW... DEFINE WHAT IS RELEVANT for THEM?
HMW... IDENTIFY the RIGHT CONNECTIONS?
HMW... NAVIGATE LEGAL LANG.? for T+C's
HMW... TEST WHAT'S RELEVANT in a CONNXN?
HMW.. MINE OUR DATA TO LEARN THIS?
HMW... GET OUT OF OUR OWN FUCKIN' WAY?
HMW.. HIJACK BIG DATA!

# Know the User

In order to be successful, it is important to understand all the stakeholders surrounding a project, product, or service.

Regardless of what anyone else says, people are the ones to buy and use your product, so keep them at the center of your work. Personas are a good way to explore who those people are.

Personas are composite constructs of people, representations of the different types of people who use your product. They may be imaginary but they are not fictional, as they are based on knowledge of your customer base and/or user base. Personas are less about demographic data, and more about context, attitude, and behavior. If you already have personas from past work, that's excellent. You can bring the group up to speed and double-check that your assumptions are correct. If you don't have personas yet, that's OK; this is a great time to investigate the *who* you're solving for.

That said, it's important to define the difference between a user, a customer, and a persona. It's probably obvious, but to be clear, the user is a person who uses your product or service. A user might not be the person paying for or administering the product. A user may or may not be your customer. For example, a customer of

Google's AdWords may be the one setting up the ad (and paying for it), while another user may be a marketing director viewing the reports. Customers pay you money. Users use your product. They may be one and the same, but that's not always the case. Further, when you have multisided markets, as is common in marketplace apps like Airbnb or Lyft, you have multiple user types (i.e., multiple whos!).

The Who/Do exercise (from our friends who wrote *Gamestorming*) is a great way to begin to explore the stakeholder ecosystem. It answers two simple questions: *who* are the different stakeholders and what do you want to them to *do* with your product?

Once you know who the stakeholders are, you can flesh out more of the information about them. You won't have to consider all the stakeholders from the Who/Do exercise—one (or two) will suffice.

## Who/Do

**How**

1. Draw a two-column table with "Who" on the left and "Do" on the right.
2. Ask the group: Who are the stakeholders? Who might be an obstacle? Whose support is critical to this project's success? Generate an exhaustive list of whos, writing each on the whiteboard or on a Post-it.
3. The Do column is typically more challenging. For each who, ask: What do they need to do, or do differently? What do they need to do for this project to be successful?
4. If necessary, you can add columns—for example, "Gives" and "Gets."
5. You can then rank and prioritize. If the choice isn't obvious, you can have each participant indicate the most important whos/dos by sticking dots on them.

**Difficulty:** Easy

**Size:** Teams or pairs

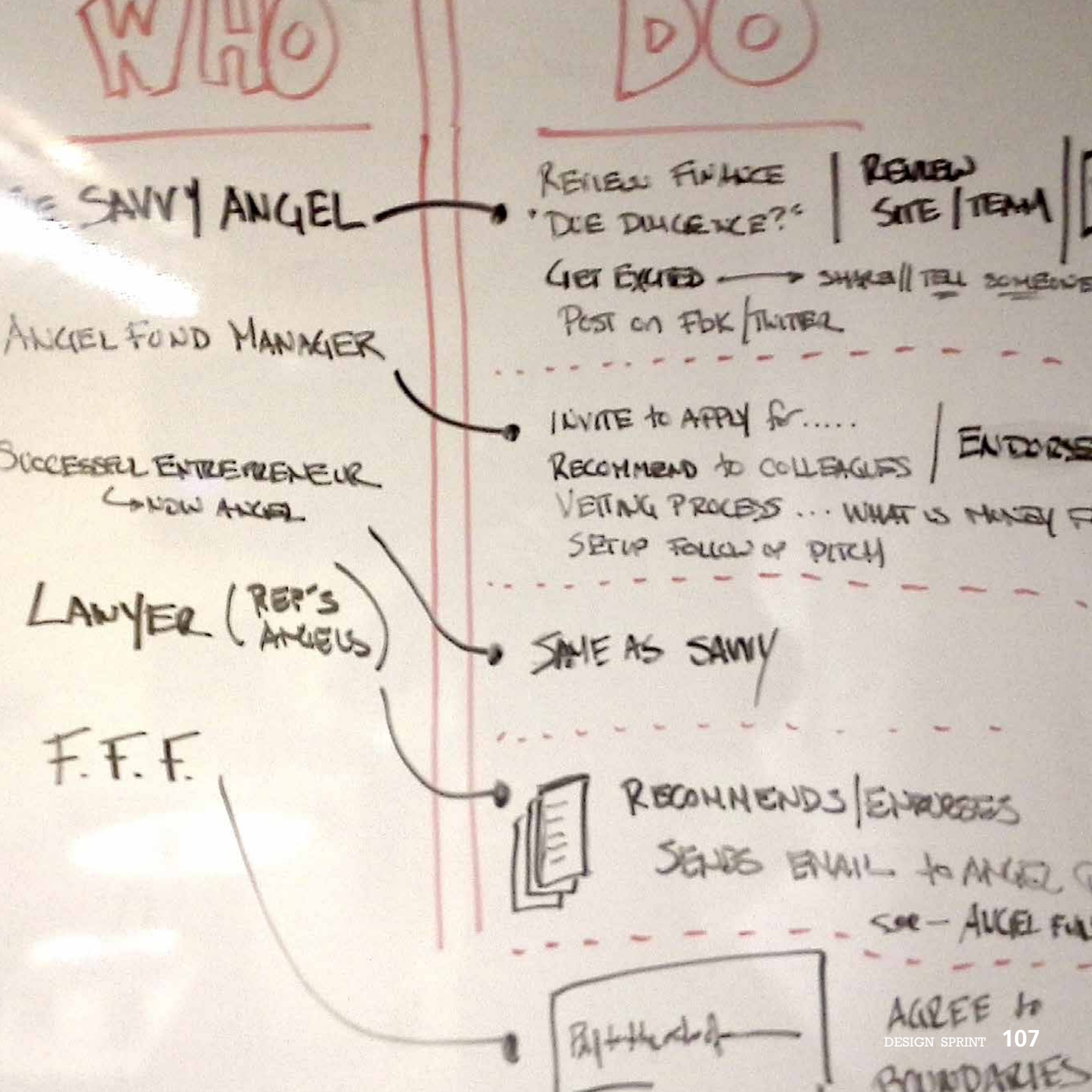
**Materials:** Sharpies; large and small Post-its in a variety of colors; wall or display board (horizontally oriented); dot stickers (optional)

**Context:** Good when first examining stakeholders of a project/product. Empathy maps, personas, and user stories or job stories are natural follow-ons.

**Don't** always drive toward action, as there is a tendency to say, "we just want them to understand." Ask the group, "What will happen when they understand?"

**Approximate time:** 10–30 minutes

**Credit:** Dave Grey at XPLANE


WHO
DO
SAVVY ANGEL
REVIEW FINANCE "DUE DILIGENCE?"
REVIEW SITE / TEAM
GET EXCITED
SHARE // TELL SOMEONE
POST ON FBK / TWITTER
ANGEL FUND MANAGER
INVITE to APPLY for.....
RECOMMEND to COLLEAGUES
ENDORSE
VETTING PROCESS ... WHAT IS MARKET
SETUP FOLLOW UP PITCH
SUCCESSFUL ENTREPRENEUR
NOW ANGEL
LAWYER (REP'S ANGELS)
SAME AS SAVVY
F.F.F.
RECOMMENDS / ENDORSES
SENDS EMAIL to ANGEL
AGREE to BOUNDARIES

## Personas

Now that you know who your most important stakeholders are, you can go deeper into their personas. This will humanize your users and give the product team a sense of empathy for the people they're designing and developing for.

**How**

1. Do a quick recap of all the user information you have, both qualitative and quantitative (Discovery Interviews, site analytics, market research, etc.).
2. Categorize your personas with some or all the following information:
    a. Persona category (i.e., information seeker)
    b. Name (fictional names are often used, but sometimes using the first name of a real customer/user can help humanize further)
    c. Job titles and major responsibilities
    d. Backstory (demographics such as age, education, ethnicity, and family status; also include their physical, social, and technological environment)
    e. Motivations (the goals and tasks they are trying to complete using the site)
    f. Quote (this sums up what matters most to the persona as it relates to your product; preferably a real quote obtained during a Discovery Interview)
    g. Images (photographs and images representing this user group)

**Difficulty:** Moderate

**Size:** Entire group (if more than five people are in the room, split into teams)

**Materials:** Sharpies; flipcharts; wall or display board (horizontally oriented)

**Context:** If you do not have preexisting personas, a great place to start is a Who/Do exercise and then base personas from the selected whos. Combine that with any data from your market research, and other primary Discovery Interviews to create a composite.

**Don't** talk about a product or solution yet. Talk in abstractions. In addition, don't add aspects to a persona that aren't based on real-world research—just consider their world and what they're trying to get done.

**Approximate time:** 30–60 minutes, depending on depth of data you have

**Credit:** Alan Cooper is considered the pioneer of personas

"ALLEN"

MKTG MGR @ RIKER-G
(4 PR FIRM)

MKT SAVVY
TECH SAVVY
TIME

## FRUSTRATIONS

- NEW CATEGORIES OF BIZ
  ← "UNFAMILIAR"
- WANNABE MKTG FIRMS
- MULTIPLE VARYING CLIENTS
- CONSTANTLY EVOLVING TOOLS (TECH)

## NEEDS + WANTS

- TO FIND NEW CHANNELS for CLIENTS
- TO [redacted] PROVE VAL
  JUSTIFY FEES
- METRICS  SUCC STO
- TO STAY "ON BRAND"

## JOBS-TO-BE-DONE

- EFFICIENT MKTG $ Spend for CLIENTS

## Discovery Interview

This is the first part of the design sprint where the team will get to talk to users and/or customers...you know: people! Research you may already have on hand will tell you the what and when of a user's actions, but the why remains elusive and the best way is to converse directly with an actual user to discover this information, and any other relevant information that may help drive the design of a product or service.

As an example, when Dana Mitroff-Silvers began a design sprint for the Denver Museum of Nature and Science, she started by running all the participants through an introductory "wallet project" design-thinking exercise from Stanford's d.school:[7]

*"It's essentially the wallet exercise from the Stanford d.school, but I change it out every time with a different design challenge based on where I'm going and who the group is. We've designed a morning commute. We designed the ideal neighborhood. We designed a Sunday night experience. It all depends on who I'm working with."*

By completing this exercise up front, she was able to navigate the remainder of the sprint and refer back to it to reinforce its concepts as necessary during the rest of the sprint, ultimately bringing a sense of empathy to the team. After the introductory exercise, she sent everyone out into the museum to observe and interact with museum goers:

*"We get ready to go out and do the real interviews; we talk about what the design challenge is, and then we talk about questions you might ask. Sometimes I let people draft their own questions; sometimes I give them starter questions. It depends on how much time and the group's comfort level and then I send them off to do interviews. Sometimes we do some observation of museum visitors out in the gallery: "What are they doing? What are they using? What kind of figures are you seeing?"*

Larissa Chavarria at The Advisory Board does something similar: although she doesn't have the luxury that the museum has with a location full of users to access, she has her teams get on the phone with users. Because of the nature of their product, sometimes users are internal employees and there's easier access, but for many teams, scheduling interviews on short notice is a challenge.

7 The Wallet Exercise is 90-minute project through a full design cycle. Participants gain an experiential introduction to the phases of the design approach and some shared vocabulary. (*https://dschool.stanford.edu/groups/designresources/wiki/4dbb2/The_Wallet_Project.html).*

*"After each interview, the team gets together and does a team debrief. After every interview, we have sticky notes, and it's two minutes to write down, 'what do you think the user really wanted or what was surprising?' Having the sticky notes helps people who are maybe more introverted or some people who are stronger at the table can sort of overpower a meeting. The sticky note process is great because everyone silently brainstorms. You put them up on the wall and you say, 'OK, this is a recurring theme. You group those together. This is an outlier, we didn't think about it.' Then you vote, 'do you think this is important? Or is this a totally random thought?' It's a good process to make everyone equal."*

Once they have completed the interviews, her team creates a matrix to determine which observations are important to drive the next phase.

Conducting a Discovery Interview is a great way to delve deeper into the context of the problem. We encourage video and audio recordings of these whenever possible so that the entire team can hear the customers' own words.

**How**

1. Create a brief description (up to two sentences) of a goal of what you seek to learn.
2. Select some icebreaker questions—something that will build rapport with the interviewee. Remember: They are a human, too!
3. Make a topic map rather than specific questions.
4. Have one person ask the questions where possible. Let the user focus on them. Downplay the other people present.
5. After an introduction, briefly describe the reason for the interview, and work through the topic map.
6. Thank them and ask for their email address (to follow up with a thank-you note!)

**Difficulty:** Difficult

**Size:** Best in pairs, but if users are in limited supply, the whole team can listen in

**Materials:** A/V recorder; notepad and pen; camera; topic map; users to talk to

**Context:** Best on the first day of the design sprint after everyone's received a data-dump and has completed the earlier exercises.

**Don't** talk more than you listen, or ask leading questions.

**Approximate time:** 15–30 minutes per interview; 60 minutes total (or longer if the schedule allows)

## User Journey Map

Now that you've gotten to know the user, you'll want to look from a holistic viewpoint at what the users are doing before, during, and after the time they use your product. This will add context to your project and highlight opportunities you may have otherwise missed. We often see teams focusing only on areas where the customer is engaged in using the product, and they miss out on many opportunities to create delightful experiences based on that behavior or entry point.

Using an experience map or a user journey map is an excellent way to visualize the journey. In a user journey map, you break down the journey of each persona into different stages. Once you have all of those stages (and goals for each stage), you can see the touchpoints where the user would interact with your product or service. "Touchpoints" are the interactions of personas with the product or service. Keep in mind that the different personas you created earlier may have different needs, attitudes, and behaviors—however, their journeys may remain the same. They might not, hence the need for this journey map.

Let's consider a search engine optimization (SEO) example. Before a user is thinking about SEO, she is writing content for her blog, creating marketing collateral, or perhaps responding to a review on Yelp. Maybe she's taking a call from a customer or writing an email in response to a support ticket. All these activities can yield insight into how you might engage users who are undertaking SEO activities. Understanding the user's situation is key to defining the context and the opportunities your team has to create a solution that not only meets, but also delights.

A journey map documents the stakeholder experience from beginning to end, inside and outside of the product to identify opportunities for ideation. Further, the team will keep the waystations on the user's journey map in mind as they sketch their ideas during the Diverge phase of the design sprint.

**How**

1. Divide group into smaller teams according to the number of key stakeholders or personas you are completing journey maps for.
2. Each team defines the stages of the current stakeholder experience from beginning to end on large Post-its in a horizontal line at the top of the wall or display board.
3. For each stage, define the goal(s) the stakeholder has for that stage; write these on small Post-its, one goal per Post-it, and place directly beneath the corresponding stage.
4. Continue this process for tasks and tools.
5. Next, map the stakeholder mental state by either drawing a moving line(s) across all the stages (high = happy, low = unhappy) or by noting significant points of mental state with happy or sad faces, or the corresponding emotion label (e.g., relieved).
6. Based on low points on the mental state, list needs, then opportunities, on small Post-its, one need/opportunity per Post-it, and post below the corresponding stage.
7. If necessary, perform a vote (using dot stickers) to determine primary opportunities to move forward with.

**Difficulty:** Moderate

**Size:** Teams

**Materials:** Sharpies, large and small Post-its in a variety of colors, wall or display board (horizontally oriented), dot stickers (optional)

**Context:** Good to do after background activities and before ideation activities. It's not necessary to complete every level of analysis for all journey maps. Choose the analysis points that meet the needs of each design sprint. It's best that journey maps focus on existing workflows, but they can be modified to map out proposed goals and needs to define what should be built.

**Don't** just focus on the product workflow; you'll want to include product elements that are part of the user's current path that does not involve interaction with the product. Don't leave out the user's mental state, as this is a significant eye-opener.

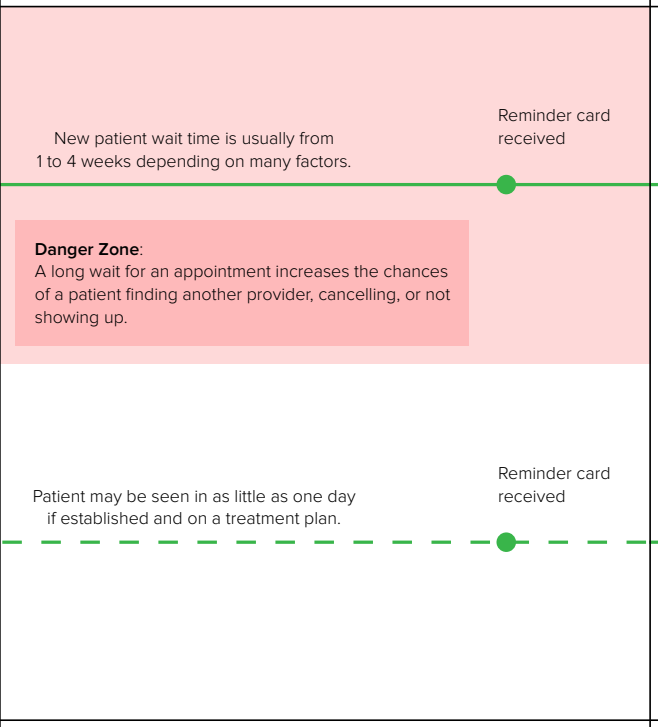
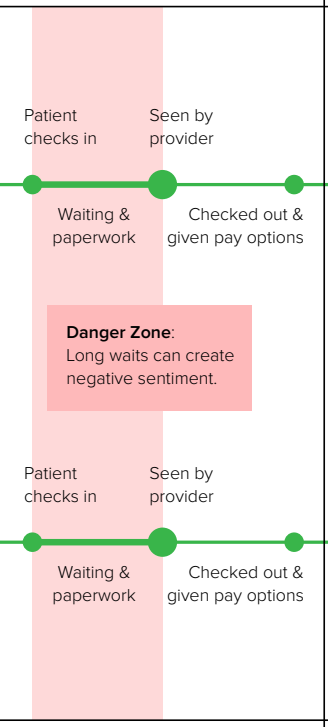
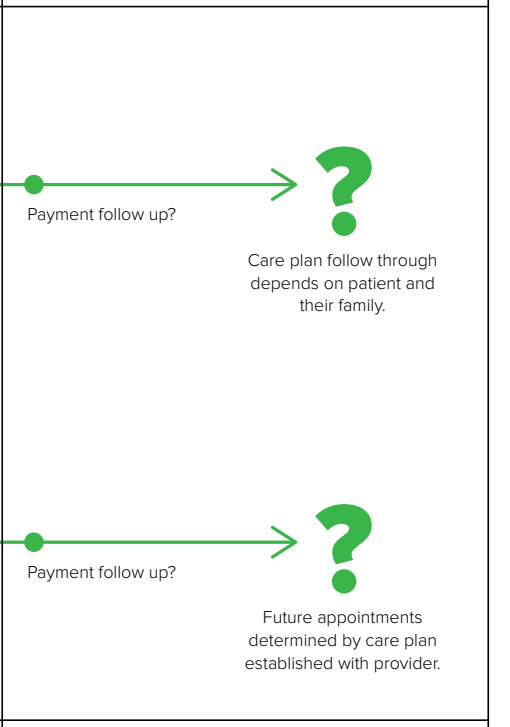
**Approximate time:** 60–90 minutes

**Credit:** Various sources

# Patient Experience Map

Yakima Valley Farm Workers Clinic

| Phase | Triggering event and pre-event | Choose/schedule care | Apply for benefits |
|---|---|---|---|
| Channel | Radio, TV, billboards, word-of-mouth | Social, phone, web, word-of-mouth | Patient benefits coordinator |
| New Patient | Heart attack<br>Rehabilitation<br>ER<br>Released from rehab & urged to seek a primary physician. | Scheduled<br>Calls multiple providers<br>Research<br>**Danger Zone**: Poor customer service can permanently lose a current or potential patient. | Referred to patient benefits coordinator<br>Established as cash patient |
| Established Patient | Positive pregnancy test | Call<br>Scheduled | |
| Trust (High / Low) | We know the YVFWC has a good reputation in the community and can reasonably expect to start out with a high level of trust | If time is only available in the distant future trust can erode quickly and completely. | Benefits paperwork should be comparable anywhere, but the PBCs can gain trust here. |
| Thinking<br>Feeling<br>Doing<br>Saying<br>Seeing<br>Hearing | **Doing**: Going to community events sponsored by clinic.<br>**Hearing**: Peers talk about clinic.<br>**Thinking**: "I can trust them."<br>**Seeing**: Friends/family are getting treated affordably. | **Doing**: Asking others about clinics. Making calls to a few clinics.<br>**Saying**: "I'm too busy."<br>**Thinking**: "I don't have time to go to the doctor, but my family needs me to be well." | **Doing**: Applying for Medicaid or ACA.<br>**Thinking**: "This paperwork is overwhelming." "Do I actually qualify for benefits?" |
| Pain Points | • Patient has no care history.<br>• Patient has care history with a different provider. | • Scheduling: personal availability, availability of providers or locations.<br>• Problems are potentially more urgent than patient is willing to state. | • High volume of paperwork.<br>• Difficulty in applying for coverage.<br>• Can't pay for care.<br>• Lack of identification, fluidity in naming conventions, name change. |

| Wait for appointment | Appointment day | Follow-up |
|---|---|---|
| Reminder in mail | In-person | Phone, mail |
|  |  |  |
| The longer a patient has to wait to be seen, the lower trust can drop.  | Again, there's a lot of room to lose trust here, but the quality of care YVFWC offers can put it on the higher end.  | The quality of follow up contact provides a lot of opportunities, to build trust and to build habits of healthy living and care.  |
| **Doing**:<br>Waiting.<br>Condition may be changing, for better or for worse.<br><br>**Thinking**:<br>"I can't wait so long to see a doctor."<br>"Why does it take so long to be seen?"<br>"I'm better, I don't need to keep my appointment." | **Doing**:<br>Filling out additional paperwork.<br>Getting benefits counseling.<br>Getting treatment.<br>Paying or deferring to benefits.<br><br>**Thinking**:<br>"Why do I have to wait so long?"<br>"The care here is really good." | **Doing**:<br>May or may not be keeping up with care plan.<br>May ignore follow up communication.<br>May never receive follow up communication.<br><br>**Thinking**:<br>"Do I really have to stick to this?"<br><br>**Saying**:<br>"They took really good care of me." |
| • Patient gets sicker while waiting.<br>• Patient finds another clinic.<br>• Patient talks themself out of seeing a doctor.<br>• Competing priorities. | • Long clinic wait times.<br>• Transportation difficulties.<br>• Patient shows up late (won't be seen).<br>• Provider is running behind.<br>• Clinic is overscheduled. | • Missing or incorrect contact details. |

## Daily Retrospective (Plus/Delta)

What have we learned? We've taken the data we have and considered those constraints. We've spent all the energy and effort up to this point understanding and identifying the problem. This is a good time to take a step back to reflect on your work and appreciate what was accomplished, and allow everyone to propose improvements and share concerns, and plan action items.

The end of the day is an ideal time to do a retrospective, even if that falls in the middle of one of the design sprint phases. It's a great way for the team to come together before everyone leaves for the night, giving closure to the day by reflecting on it and planning for tomorrow.

There are many common retrospective formats. We recommend a Plus/Delta approach.

**How**

1. Draw two columns on a whiteboard: one for a "+" (plus: what went well) and one for "Δ" (delta: the Greek symbol for change).
2. Ask the group to reflect on what was positive and capture those thoughts under the "+" column.
3. Ask the group then to candidly brainstorm what they would change about the day, and put these under the "Δ" column.
4. For each item in the "Δ" column, list any action items that can be taken. For example, "revisit the challenge statement to include Larissa's feedback about older users." Address these action items in the next day's activities, or note them for future sprints.

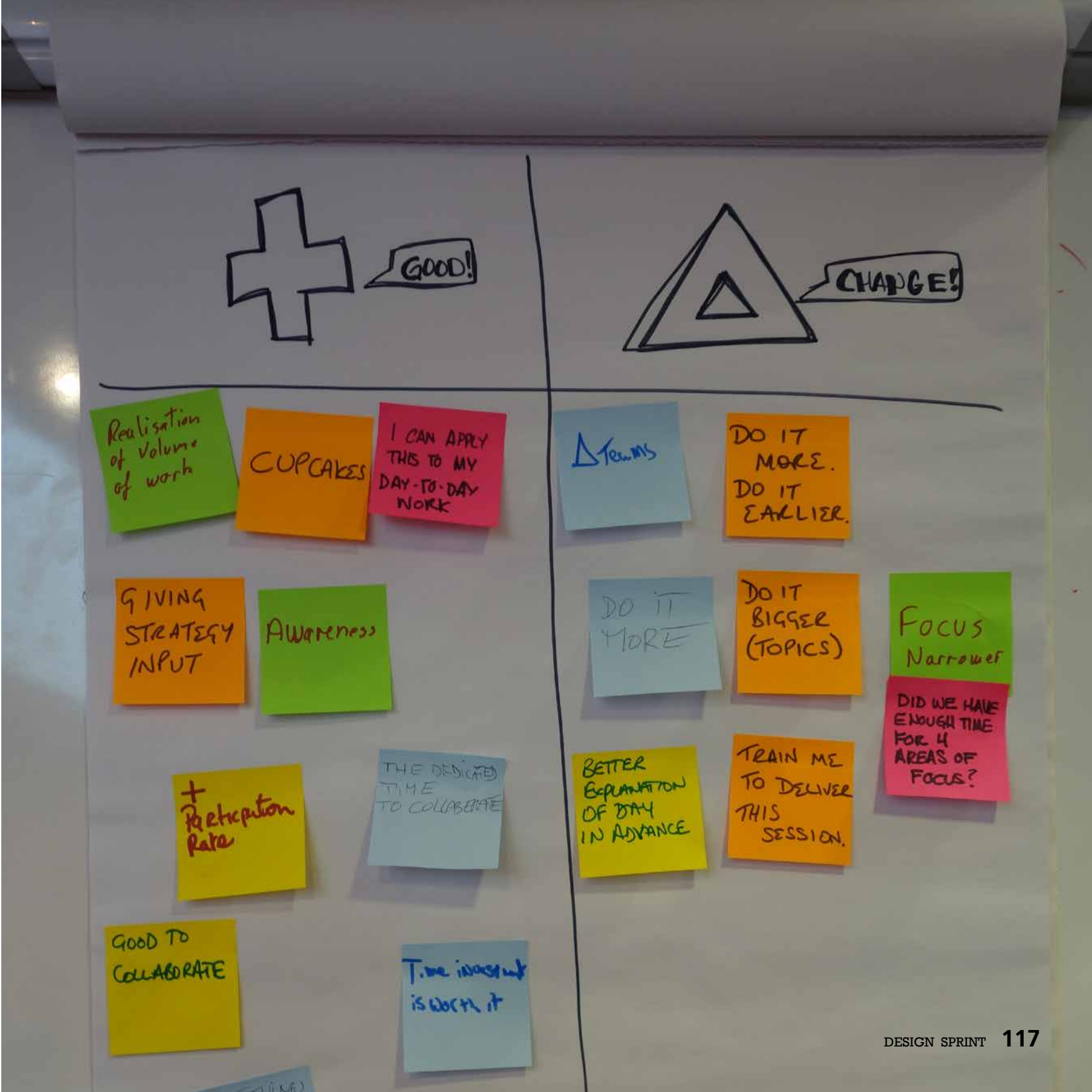
**Difficulty:** Easy
**Size:** Everyone
**Materials:** Whiteboard or Post-its

**Context:** Done at the end of every phase, except the Prototype phase, which requires a longer, more in-depth retrospective of the entire design sprint.

**Don't** ignore or skip over this exercise; daily reflection will help you continually monitor your progress. Don't think that every delta is an immediate action item, or allow deltas to become just "what I didn't like."

**Approximate time:** 10–15 minutes at the end of each day, 30 minutes at the end of the design sprint

**Credit:** Plus/Deltas are found in the book *Gamestorming*. The earliest known use of the Plus/Delta game is at The Boeing Co circa 1980.


GOOD!
CHANGE!
Realisation of Volume of work
CUPCAKES
I CAN APPLY THIS TO MY DAY-TO-DAY WORK
Δ Terms
DO IT MORE. DO IT EARLIER.
GIVING STRATEGY INPUT
Awareness
DO IT MORE
DO IT BIGGER (TOPICS)
FOCUS Narrower
DID WE HAVE ENOUGH TIME FOR 4 AREAS OF FOCUS?
+ Participation Rate
THE DEDICATED TIME TO COLLABORATE
BETTER EXPLANATION OF DAY IN ADVANCE
TRAIN ME TO DELIVER THIS SESSION.
GOOD TO COLLABORATE
T.me investment is worth it

## Team Drinks: Less Filling and Tastes Great!

As the first day concludes, take the opportunity to go out with the team if you can. Getting out of the conference room will give you a fresh perspective, and the conversations you have will forge connections with your colleagues that will last the duration of your project and beyond. You will likely be tired toward the end of the remaining days of your sprint, so take advantage of this.

Drinks are a low-pressure way to get together without a big time commitment. The people who are local will then be able to get home to their families at a reasonable hour. Make sure you leave early enough; we prefer to leave for drinks no later than 4:30 p.m. (or 5 p.m. at the latest). If people want to spend more time after, anyone who chooses to can go out to dinner.

If there isn't a good place to go nearby, raid the beer and soda fridge and have a chat in your company's lounge or café. It's almost as good, and you can't beat the price!

Pace yourself; the second day of a design sprint is coming up soon and will be an intense one. Equally attractive nonalcoholic beverages (EANABs) are also always an option!

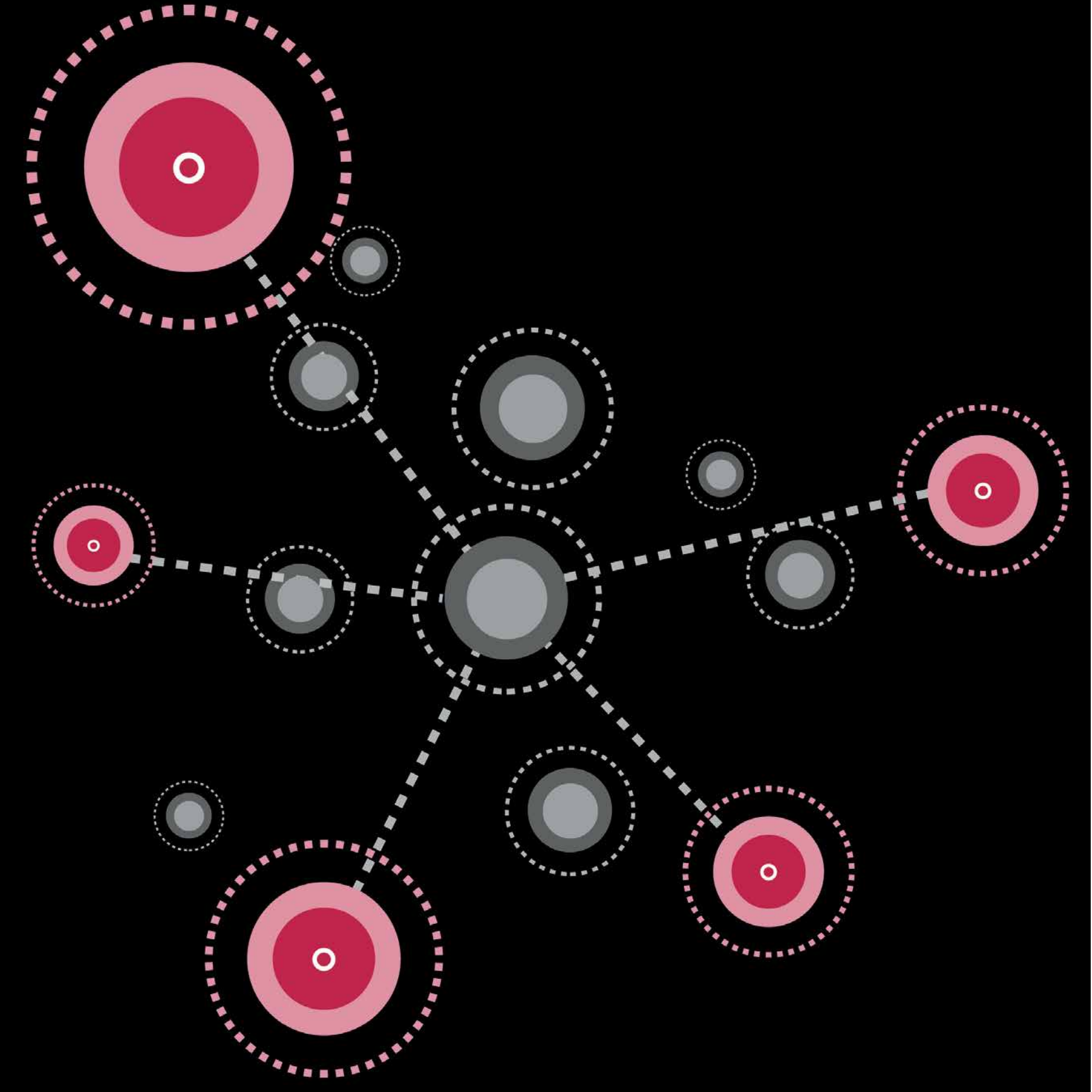
**How**

You need instructions for this?

1. Go forth and get drinks!
2. Enjoy.

## Takeaways:

- Inspire yourselves with background materials and other solutions to similar and related problems.
- Define the problem and take time to understand it and the data you currently have about it.
- List out all your assumptions, facts, and remaining questions that your current data and research do not answer.
- Conduct Discovery Interviews so your team can understand who they're designing for.
- Create personas to humanize your users. They are people too!
- Map out the user's current journey or experience so you have a full visual context of the problem at hand. You'll be able to identify which areas to focus on creating a solution or a fix to a current friction point.



O'REILLY®

# THIS IS SERVICE DESIGN DOING.

Marc Stickdorn
Markus Edgar Hormeß
Adam Lawrence
Jakob Schneider

# 5. Facilitating Workshops.

## 5.0 Why facilitate?

Co-creation makes great sense. In engaging a diverse group of participants in a multidisciplinary team, we guarantee a rounded approach to a product, keep it rooted in reality and ensure later buy-in from a wide group of stakeholders who have been involved from the beginning. We need that precious range of viewpoints and experience.

But put some guys from marketing, some hotline staff, a financial whizz, some techies, some middle management, a couple of designers, a union rep and a handful of customers in a room, and sit back to listen. It will immediately be clear that the people speak very varied languages, sometimes literally. They might not share the same level of education or powers of empathy, abstraction, expression and comprehension. They certainly have different ways of working, diverse goals and varied measures of success. How can we get the most out of these people, and keep them moving forwards together in a context where they all feel useful, engaged and might even come again next time? Figuring that out is the role of the facilitator.

Many people in service design come from a graphic design or product design background. Their key skill and primary tool might be sketching or visualisation – given a problem, they first reach for a pen. Others come from UX, and might be strong in throwing together quick physical or digital mock-ups and testing them effectively. Yet others are managers, and are at home persuading with Powerpoint or Excel, assigning goals or directing and motivating groups by talking or email.

**But if service design is a truly co-creative activity, then facilitation must be the key tool of any practitioner.**

A quick search online or a glance through your business library will reveal a lifetime's reading on the role and roles of the facilitator. Some experts distinguish between the facilitator, and someone who is just facilitating. Others talk about a facilitator, a facilitative individual, a facilitative leader and a facilitative group[1]. But most of this good advice arises from the context of meetings, debates and similar work sessions – largely verbal activities which are usually set up to make decisions. Service design, in contrast, is a creative, exploratory and sometimes physical activity which has a very different process and outcome. Are the traditional business facilitation approaches enough? In

[1] Michael Doyle 1996, in Facilitator's Guide to Participatory Decision Making, Sam Kaner, Jossey-Bass Third Edition 2014, p xx

this book, we suggest adding techniques used in other creative and exploratory processes. In service design, in related disciplies, and in this book, you will also find terms like director, servant-leader, Joker and Difficultator.

In reality, the task is hard to pigeonhole and the role is a fluid one. Whatever he calls himself, a facilitator uses specialist skills and knowledge to “make easy” the journey through an often unfamiliar process, and tries to leverage the experience and expertise of the group while maintaining sustainable cooperation and perhaps even developing the individual members.

## 5.1 Key concepts of facilitation

A facilitator works at three levels simultaneously – process, group and individual. She will facilitate the process, offering information, selecting activities and consolidating results to guide the work towards a successful conclusion. She will facilitate the group, keeping them motivated, engaged and productive while handling conflicts and tensions. And she will facilitate the individual, helping them to be more empathic, analytic, creative or sceptical as needed, and perhaps helping them evolve in their skills and perspectives.

### 5.1.1 Consent

While it’s possible to facilitate a process without the consent of the participants, it is an uphill struggle. Most facilitators prefer to get the explicit consent before going far into the project – but that simple nod on the first morning is never enough. At first, all the particpiants know about an external facilitator is that she is an outsider, probably earns more per hour than most other people in the room, and was just seen joking with the boss in the corridor. There is no trust at all, but nobody will speak up against her at the beginning of the project in the glare of C-suite attention. Lack of consent is more often not explicit, but is a creeping sickness of lethargic responses, sideways glances and insupportable objections.

To counter this, many facilitators slowly stack up implicit consent through a series of agreements designed to build trust. They might start with consensus on the simple stuff like timings, breaks and where to have lunch, then move on to agreements on the process and how to make group decisions. Later, depending on their style, there might be permission to step into disputes, to offer suggestions, even to determine the endpoint of the process.

### 5.1.2 Status

The status of a facilitator is complex. It is binary: she might be master of the process, but she is also a servant of the group and their bosses. And it is variable: localised within a room or project, temporary, and limited even there. But as an outsider a facilitator can also say and do things which others cannot. As discussed in the section on styles of facilitation, Forum Theater[2] practitioners call their facilitator a Joker, and the term fits well for any facilitator. Like a medieval fool, a facilitator is disqualified from holding real power, so she is free to state the obvious, ask the stupid question and name the elephant in the room. And like a joker in cards, she can rapidly change her status to suit the needs of the moment, switching from expert to innocent, from slave to queen.

Most people in organisations "have" status – through seniority, personality and network, or some combination of those. For facilitators, it is more useful to see status not as an innate quality, but as a tool which can be consciously applied and changed at need (see section XXX in this chapter).

### 5.1.3 Neutrality

There is a great expectation of facilitators to be fair, and one of the fastest ways to lose a group's consent is to behave in a way which they see as biased. But different facilitators have different interpretations of neutrality, especially when it comes to content.

We can think of a project as having several aspects. There is the structure, the process and the content[3]. The *structure* is stable and includes membership and roles in the group. The *process* is how a group works together – the sequence of activities they undertake, how they communicate, make decisions and more. And the *content* refers to what the group is working on, for example the problem they are trying to solve, or the thing they are trying to create.

Many facilitators, especially external ones, have little input into the structure of a project. They are given a team to work with, and a set amount of time to reach a successful outcome. They might be able to suggest other group members, beg for more time, and assign roles within the group – but little more.

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[2] a facilitated, participatory theater form in which members of the audience explore possible strategies by stepping into a play themselves; see later in this chapter.

[3] See Roger Schwarz in The Skilled Facilitator Fieldbook, by Schwarz, Davidson, Carlson & McKinney er al, Jossey-Bass 2005, p 3

In questions of process, the facilitator usually has far more power. Often they are invited precisely because they master a certain set of tools or activities which the group does not understand. At times, they will adopt certain operative habits of the host organisation – like a certain way to do feedback, or critical KPIs[4] – but they are generally at least an equal partner in the process design.

When it comes to content the division of responsibility between facilitator and host organisation is less clear. Some facilitators, especially external ones, choose to stay well away from all content matters. They take care of the process, and remain firmly agnostic to the ideas involved and the final result. Others are happy to share their own knowledge in a carefully neutral way – "I saw it done this way at corporation X", "Professor Y wrote an interesting article on that" – but will not make a judgement or cast a vote. A third group feels able to grapple fully with the content, stating firm opinions and making suggestions while also owning the process. Whichever path they choose, facilitators will need to pay at least enough attention to the content to make sure that the group is on target and making progress towards the goals of the workshop.

## 5.2 Styles and roles of facilitation

### 5.2.1. Adopting a role

Effective facilitation is hugely a matter of style choices.  Different facilitators will have very different focus and "tone", even if they use the same methods and the same timetable. They will have diverse approaches to consent, status and neutrality, as well as their own prefered activities and personality quirks. But it is not always necessary or even advisable to "be yourself" as a facilitator. Like a manager, a facilitator steps into a role, and can choose how that role should be. This does not mean pretending to be someone you are not (or copying another facilitator) as inauthenticity is bound to fail. It is about deciding which aspects of your personality to emphasise, which choices to make today.

Many related disciplines offer pre-made roles which can be adopted or adapted for service design facilitation. A director in theater or film co-creates a new experience by instructing and coaching her ensemble towards an outcome. The role is much like a manager in many ways, and various styles can be seen[5]. Some directors have a clear

[4] Key Performance Indicators

[5] Importantly, the director is not usually an actress herself, so she is leading a team of people who are capable of things she cannot do This is very similar to the situation of software development managers, who are not usually coders.

vision of the final result, others let it emerge; some are very open to input from the ensemble, others are more autocratic. But like many (product-) design stars, and like many managers, a director takes primary responsibility for the final result - something that few service design facilitators would do. This can be a difficult model for design teams, as the participants can feel instrumentalised, but some aspects of it - in particular the coaching team members to play to their strengths - are very useful.

In Scrum, an approach to co-creation most usually seen in Agile software development, the facilitation of the project is cleverly divided into two roles: the Product Owner and the Scrum Master[6]. The Product owner is responsible for the successful output of the project - making sure that the needs of the sponsoring organisation and the customer are met. He does not inteact with the development team in technical matters. The Scrum Master is responsible for the success of  the development process. She will "protect" the development team, making sure that they stay on target, but also that they have freedom to work. Scrum Masters are sometimes described as "servant leaders"[7], in that they serve the team by leading them to success. If adopting this model, service design facilitators can consciously switch between these roles, perhaps in different phases of the workshop, or can share them between co-facilitators.

Improvised theater also has some facilitation approaches and roles which can gove you ideas. Just like design, improvisation takes a fundamentally unpredictable process and gives it form and direction by sticking religiously to some simple structures and principles. Among these is the idea of co-leadership, exemplified in the tradition of "Yes, and…", or even more strongly in Viola Spolin's call to "follow the follower"[8]. The practice of Applied Improvisation takes these attitudes from the stage and into organisations, and is full of useful lessons for co-creative facilitators. One special variety of improvised exploration, Forum Theater[9], has a very interesting facilitator role called the Joker. In this role, practitioners accept that co-creative groups will often try to make their lives easier by making their task simpler than it is. Teams are naturally tempted to assume that their idea will be accepted quickly, that people will want to use it and will understand it, that the sun will shine and all will go to plan. A Joker is tasked with challenging these assumptions, representing the harshness of the real world and making things more tricky for the design team. The name "Joker" is very well chosen. Just like the joker in a pack of cards, he is fundamentally neutral. He is also changeable

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[6] Schwaber and Sutherland, www.scrumguides.org

[7] Robert K Greenleaf, "The Servant as a Leader" 1970 and later writings. See also Larry Spears writing on Greenleaf.

[8] Viola Spolin, "Improvisation for the Theater: A Handbook of Teaching and Directing Techniques", 1963 and later editions

[9] Boal, Augusto. 2000. *Theatre of the Oppressed*. 3rd ed. London: Pluto. ISBN 978-0-7453-1657-4.

or apparently capricious, often using dark humour to flip between making life easier for the team (being a "*facilitator*") and making it more difficult (being a "*difficultator*").

### 5.2.2. Co-facilitation

Facilitators often work alone, but it can be very effective to have a facilitation team. With large groups, there might be a lead facilitator or facilitators with responsibility for the entire process. Junior co-facilitators might then step in for particular tasks, or each could gve more hands-on assistance to a subset of the group. It's also fruitful to share the lead completely, taking turns to be in the spotlight. This gives the participants variation in delivery and style, which will help them pay attention. The facilitator who is less in focus can watch the group for potential musinderstandings, prepare the next task, work on documentation of the process or simply be ready to step in as needed. It's enormously empowering to be facilitating in the knowledge that you can go as far as you need to go, try new ideas - your colleague will get you out of trouble.

If you have the opportunity to work as a facilitation team, plan your roles consciously. With two facilitators, one effective division is for one facilitator to be outcome focussed, while the other takes care of the needs of the group in the room. This is similar to the division of Scrum roles mentioned in the previous section, and it is not far from the TV thriller classic of "good cop, bad cop" - at least as far as the participants are concerned[10]. Sometimes, the backgrounds or organisational roles of the facilitators will offer other useful divisions, such as "front stage, back stage" (user experience vs process), or "digital, physical". It can also be useful for one "low flying" person to take charge of the tools and exercises being run in the room, and another to connect the outputs of those into the "high flying" strategy and goals, showing the participants that they are on target for their organisational needs.

Having multiple facilitators also gives the facilitation team one very valuable tool - it's possible for the facilitators to publicly (but politely) disagree. Doing this consciously can help more passive groups understand that there is no one clear "answer" to the task they face, and that their own input is just as valuable as the facilitators'.

TEXTBOX from Carola Verschoor, TiSDD Alumn
"*When we did our first jam, Nicole and I said: okay, which will you be? Adam? Markus? Marc? It helped to be inspired by others as we went into our roles. Facilitation involves stepping into a role in order to help others achieve their goals. The freedom you have in the tools is also a freedom you have in terms of how you use that role."*

[10] Colleagues with military experience have likened these roles to the duties of the second in command and the senior NCO; or even to clichéd "mother and father" roles.

### 5.2.3 Team members as facilitators?

It's a common question - "can a team member be a facilitator?". In most situations, this seems difficult. A colleague working temporarily as a facilitator might have the consent of the group, but it is difficult to remain neutral if you are in the project because of your connection to the theme. It is even more tricky to be perceived as unbiased when you represent a certain part of an organisation. More crucially, an internal facilitator does not have access to the full range of status strategies which an external facilitator can adopt. She has a clear place in the hierarchy, and cannot move too far from that status in either direction.

In everyday project work, budget constraints or timing often mean that one of a team must take on the facilitator role. While challenging, this is certainly not impossible. Take a look at the tricks of traditional meeting processes, where the chairperson is a temporary role given localised authority. Their unique status is suggested by some ritual agenda tasks and a special physical position in the room.

Generally they concentrate on guiding the process but will get involved in decisions via a casting vote when it's unavoidable. That's an excellent simple model for facilitating colleagues – taking control of the agenda and timing, keeping some distance from the issues by perhaps standing at the flipchart while others sit, and only dipping into the content level when necessary or especially valuable.

A team *leader* in a facilitator role will have great difficulty ever being seen as neutral and will find it hard to effectively adopt a lower status. This makes it especially difficult to combine project leadership and facilitation tasks, as Scrum acknowledges with the split into the roles of Product Owner and Scrum Master.

## 5.3 Building the team

The cast of people in the room may vary at different stages of the project, and may not be the choice of the facilitator. But a good rule of thumb is to involve representatives of "anyone affected by the project, anyone who will deliver it, and anyone who can stop it". Many organisations tend to restrict the invitation list to the core responsible team, but they are usually quick to see the benefits of involving other parts of the organisation, and these "guests" are often enthusiastic about being involved. On a longer project, this

can cause budgeting issues – who is paying for that person's time? – so make sure to discuss this aspect in good time.

When it comes to customers, many organisations are unwilling to show their offerings in an incomplete state and to let customers look "behind the scenes" in co-design sessions. It's a pity, because this inclusive approach can be a real PR win. When airline KLM set up a co-design lab at Schipol airport, they expected (and got) great insights. But they were surprised by their customers' huge positive reaction to actually being involved in a design process[11], instead of just a satisfaction survey. Usually, though, organisations are only willing to involve end users in limited phases of the design process, in a way familiar from the the old-fashioned "focus groups". One way to extend this is to involve customers in other ways, for example in more street testing and contextual interviews, so that the team see first hand the value of including customers and are keen to bring them into the workroom.

## 5.4 Planning the work

Group facilitation takes place over various timeframes, which we can think of as the project scale (months, weeks) and the session scale (hours, days). Project-level planning will usually follow whatever innovation or design structure the organisation and facilitator choose, such as the typical iterative process of research, insights, ideation, prototyping, testing and implementation (see chapter XXX).

It's vital to remember that design is an exploratory activity, and it is both futile and counterproductive to try to plan everything – whether on a project or session scale. The facilitator and the group will have to adjust and pivot as they go along, changing plans to fit the reality of the discovery process but never losing sight of the time constraints. Smart facilitators will incorporate these adjustments in the project planning, or might even adopt an approach like the Agile approach to software development, which has a planned cycle of work sprints, reflection and reorientation.

Planning the facilitation will be a matter of choosing activities and allocating resources along this process. Within a single session there might be less ground to cover – and thus more freedom for the facilitator. On whatever scale, the facilitator will be planning from two points of view. She will have design goals, and will need to plan methods which achieve them. But she will also have to consider the human needs of participants, planning a sequence of activities and goals which is not only effective but also engaging, enabling, encouraging and enjoyable. She should take time to create a "safe

[11] Marcel Zwiers, 31 Volts, presentation at Service Design in Tourism Conferece, Sarasota 2013

space” for their team, helping them to be more creative, flexible and willing to both fail and share.

## 5.5 Safe Space

Many service design tools and methods seem uncomfortable and strange to people in organisations, especially because a creative process needs people to fail. This is a very unfamiliar way of working, and people need help to accept and come to welcome it. One way to help people be happy to fail is to create a “Safe Space”, the physical and mental environment which accepts and embraces failure. This is very important, and skimping on this aspect is one main reason why innovation workshops can fail or be unpopular. The idea of Safe Space is well developed in theater, where every actor knows that the rehearsal room is completely safe. He can try anything there without fear of censure, will never be interrupted or mocked, and will be judged only on what he chooses to bring out of the room.
A Safe Space cannot be set up by simply declaring it. “Today, nothing we do goes beyond this room” is a statement which only works if there is full trust, and trust is not usually present at the beginning of a co-creative project. Instead, Safe Space is built up using a mix of techniques – both in the planning phase and during the session itself. Many of these techniques are based on giving a sense of security to participants who are going through an unfamiliar process. Others help the team members adopt different mindsets – catalogues of behaviour and responses – which are unlike the usual work mindset and are more conducive to cooperative, creative work.

**Own the space:** a good co-creative session needs its own private space where the group are not overlooked. Close the door, un-invite guests (“no spectators today – join in or step out”), and paper up any windows which expose you to curious passers-by. This need not be overt – a strip of flipchart paper at eye-height gives privacy and holds your sticky notes later. You can extend the room ownership to the group by letting them rearrange the room themselves (see “break with routine” below).

**Start in familiar territory**: it’s rarely helpful to plunge people into cold water. Start where they feel safe, for example in a corporate environment you might wear a suit and welcome guests into a conservative room layout. Perhaps you start with a calm Powerpoint presentation showing which critical goals or strategic campaigns the project is part of. Orientation is important (see below), but people don’t always perform best if they know exactly what is coming. Show an agenda which describes the coming session in conservative terms, without being dishonest. For example, an agenda point of “roleplay session” or “live street research” will worry some group members, but you

can describe the same session as “understanding the customer” and no-one will think twice.

*>>> textbox case story from Arne* *Starting with powerpoint suit-up, then getting rid of business dress step-by-step.*

**Invoke authority:** It’s possible to establish authority and ownership of the process with a firm welcoming handshake, a look straight in the eye, a tone of voice and carefully chosen words of welcome. Sometimes, you need more. If you have reference customers who are impressive and perhaps also conservative, you might name them when you introduce yourself to the group, and say in what context you were able to help them. If you have relevant qualifications which will mean something to the group (and if can talk about them without sounding like a boaster) mention them early on.
You might also mention some very conservative and traditional organisations who are using service design or design thinking, like the Big Four consulting companies and their peers[12], or the US Military[13]. For the biggest effect, get senior staff of your client organisation to address the group by email, video message or in person and tell them which parts of the organisation are behind the initiative, and which strategic goals it fits into.

**Break with routine:** having started off in a conservative tone, it’s time to show that the upcoming work session will be different and will have room for other kinds of idea and behaviour. Do something unusual but clearly useful (like an extreme warm-up, complete with neurological explanation of why it’s important; or have the group quickly rearrange the room for group work). It’s impossible to win trust straight away, but you might generate some curiosity. If someone resists warm-ups as kid’s stuff, talk about the science and experience behind them[14] and imply that someone who rejects them is missing an opportunity to be more effective.

**Ease in:** don’t jump straight into the hard stuff, or put anyone in the spotlight yet. The break with routine will have started to open the safe space in the minds of the group, so now might be a good time to agree or establish some ground rules. The Rules of Rehearsal are one example, but you might have your own. It’s useful to establish early on how you will make decisions – the Rules of Rehearsal do this via the point “doing, not talking”. You might play a game to demonstrate useful behaviours or attitudes, like

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[12] “Service Design will be at the core of where we want to go.” Joydeep Bhattacharya, Managing Director, Accenture Interactive Financial Services at SDN global conference, Stockholm 2014.

[13] Art of Design, Student Text Vol. 2 by US Military “School of Advanced Military Studies” at http://usacac.army.mil/cac2/CGSC/events/sams/ArtofDesign_v2.pdf

[14] References to come

perhaps a “Yes, and…” game. Or you might quickly sketch the format of the day. Don’t spend too long on this. After an intense warm-up, the team will want action, not discussion.

*>>> Textbox or graphic/photo: Rules of Rehearsal. 3: Use what you have. 2: Play seriously. 1: Doing, not talking”*

**Give orientation:** people will feel more comfortable if they know where they are in the process, so a large visual of the whole process is always reassuring. Some phases of a design task are not comfortable, even for experienced designers, and telling the group that it is o.k. to feel confused or out of control at these points will help them enormously. Refer to your process visualisation often and especially to the divergent and convergent phases. (The Squiggle is also useful here, see page XXX).
The end of a divergent phase can feel overwhelming. Participants thought they had a handle on the project, now suddenly there are so many new ideas, so many possible variations. This is a loss of control, which is precisely what most organisational processes try to avoid. It’s unfamiliar – so tell them “it’s normal to feel like this”, and try to never end a session on a divergent phase.
Being moved into convergence before you feel ready (the “crunch”) can also be unsettling. Someone who is not used to an iterative process will be used to making more-or-less binding decisions and will want to check all the data carefully before they feel ready to decide. Reassure them that they are not committed until the end of the project, and that prototyping and testing will check the ideas for them.

**Sh!tty First Drafts:** people who are new to creative work are usually far too careful. They think creativity is about having great ideas, so they spend too much time on their first ideas and run the risk of falling in love with them. Show them that in these early iterations, low-fi is encouraged.
You could show them some of your own ratty sketches, some very flimsy prototypes, or perhaps introduce the concept of Sh!tty First Drafts. This is based on Hemingway’s observation[15] that, “the first draft of anything is shit”. That’s a tough word to say in some corporate concepts, but there is no better way to express the idea. Gifted director Robert Rodríguez[16] wrote that “ever director has at least 10 bad films in them”, and urged his students to get those bad films out of the way so they could start making good ones.

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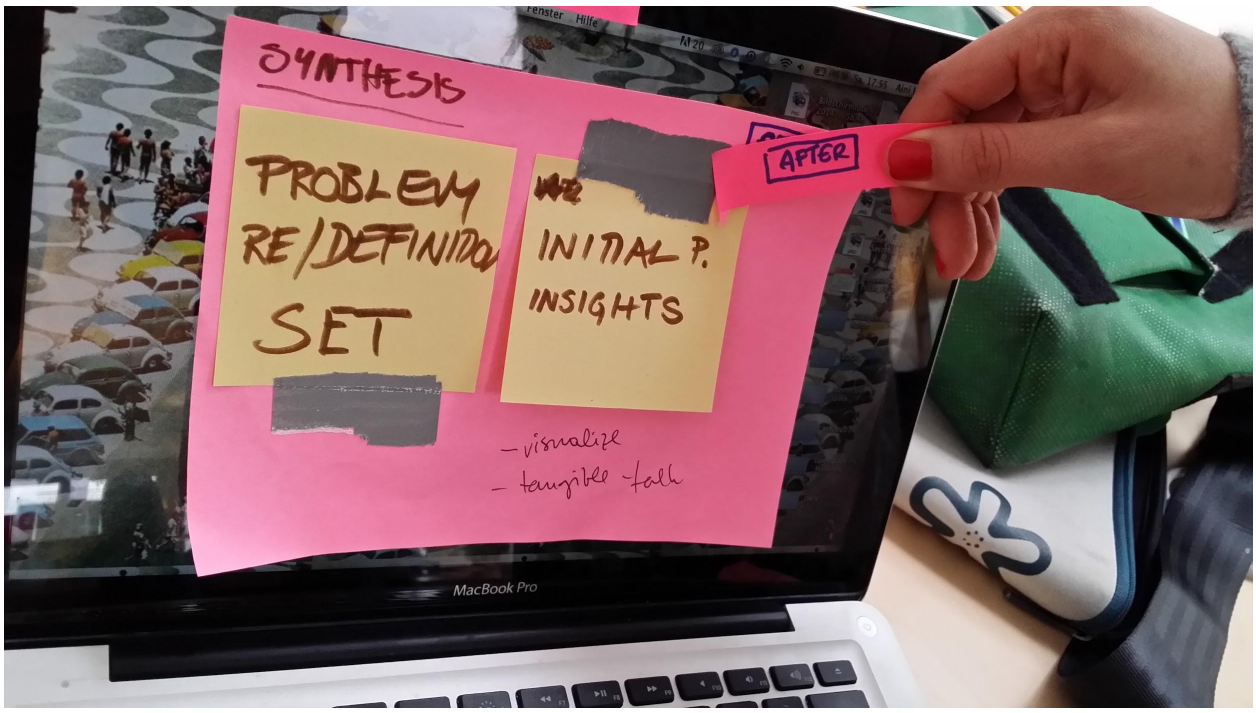
[15] Hemingway’s statement, and the term “Shitty First Draft” was popularised by Ann Lamott in her 1994 book, Bird by Bird: Some Instructions on Writing and Life.

[16] Robert Rodríguez, Rebel Without a Crew: Or, How a 23-year-old Film Maker with $7,000 Became a Hollywood Player,

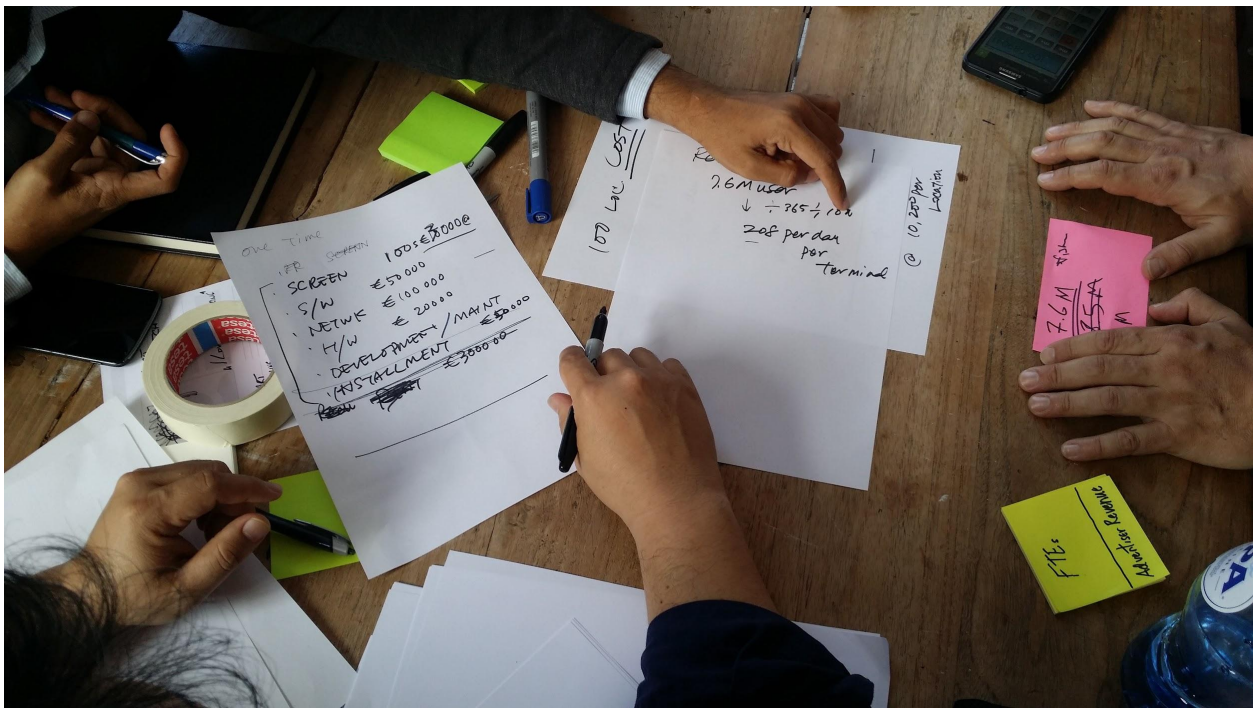
In the Executive Schools which led to this book, the concept of the “Sh!tty First Draft” became a real favourite with participants returning to their companies, as it freed people from the desire to think everything through in detail and take responsibility for every spontaneous idea.

>>> TEXTBOX - Adam on Sh!tty First Drafts
You can talk about Sh!tty First Drafts explicitly, or leave the term unsaid and instead encourage people towards them. One way is to use seemingly “impossible deadlines” which make the group worry about quantity instead of quality. For example, in a 10 + 10 sketching exercise (chapter XXX) where a group is supposed to produce ten sketches in a round, just give them three or four minutes for the whole task.
The resulting sketches will be so quick and scribbled that it is clear that none of them – or the ideas behind them – will be very good. But one or more will be a starting point, and the rest will be easy to leave behind.
>>> Photos of some SFDs, perhaps with quotes from TiSDD participants.


(Image: Sh!tty First Drafts can be made in seconds or minutes)



(Image: A Sh!tty First Draft of a webpage gets across the basic idea in seconds, and starts the iteration process in minutes.)



(Image) A Sh!tty First Draft or “guesstimation” of the numbers can let teams rescope early)

(image: A Sh!tty First Draft of a train seating system immediately reveals practical problems  )

**Mix activities, make a mess:** different people appreciate and understand different types of activities, so keep the energy in the room and appeal to different audiences by including a broad mix of activities. Try to choose activities which make a clear contribution to the task at hand, but vary the location in the room, the media, the focus, and the physical position of participants.
You can emphasise the explorative, “throw-away” nature of ideas by creating a mess as you go on. Consciously use different coloured pens and scraps of paper. Have candy in wrappers (rustling, noisy ones are best) which litter the room. Have things like toys, gadgets and old prototypes lying about – people will pick them up and fiddle with them while they think and talk. All these will help people remain sketchy in their thinking and presentation, until the time comes to focus down, make choices and tidy the room.

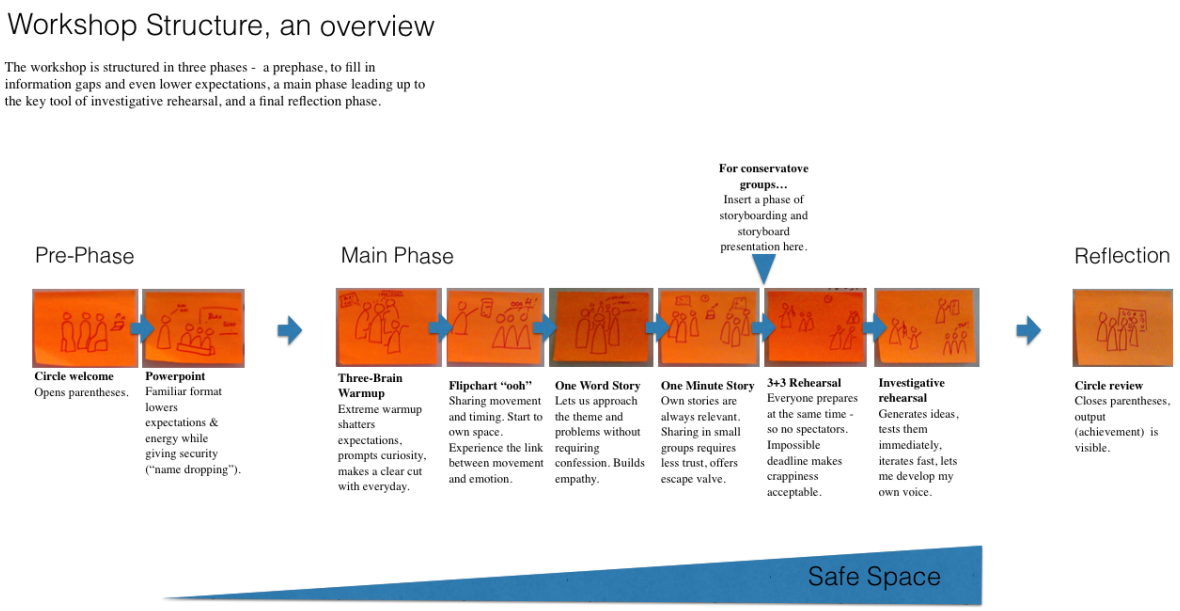
**Avoid killer words**: avoid words and phrases which force people to be overly analytical or which raise the stakes on ideas too early. Don’t ask for “your best ideas”, just ask for a heap of ideas “to get us started”. Don’t ask people to “choose the best option”, just tell them to “grab an interesting one to kick off with”. Don’t ask for a presentation or a role-play, ask instead for a quick status report or say “show me how it might look”.

**Offer safety nets**: help people learn to let go of ideas by always generating so many of them that letting go of some is easier. (There is also a close link between the number of ideas in the early part of a project and the final success.) Increase the willingness to let go by throwing nothing away. Ask teams to pin up “abandoned” ideas on the wall so they can come back to them later if necessary. Help them look back at painful but useful experiences by not asking “how should we have done this better”, but by asking “how might we do this in future?” Let groups choose which ideas and insights to take forward, so someone can quietly ask his group, “can we *not* take my suggestion, please”.

**Avoid judgement:** in most corporate contexts, quickly deciding what is good and what is not is a key skill. Service design encourages us not to rank and choose ideas, but to evolve them through prototyping and testing. So it is helpful to avoid asking “was that a good idea?”, but instead asking “how did that feel?” or “what does that suggest?”. In a co-creative environment, the words “good” and “bad” are rarely useful for content.

**Fail first:** it is no use telling participants that failure is welcome, then doing everything you can yourself to avoid it. If you mess up a part of your facilitation, be open about it. Laugh, and describe it as a learning opportunity (some irony is completely appropriate). Be clear that the whole session is explorative, and that some activities might fail. Give permission to be human by being human yourself.

*>>> EXAMPLE GRAPHIC (Storyboard) of a day to show these principles in practice*



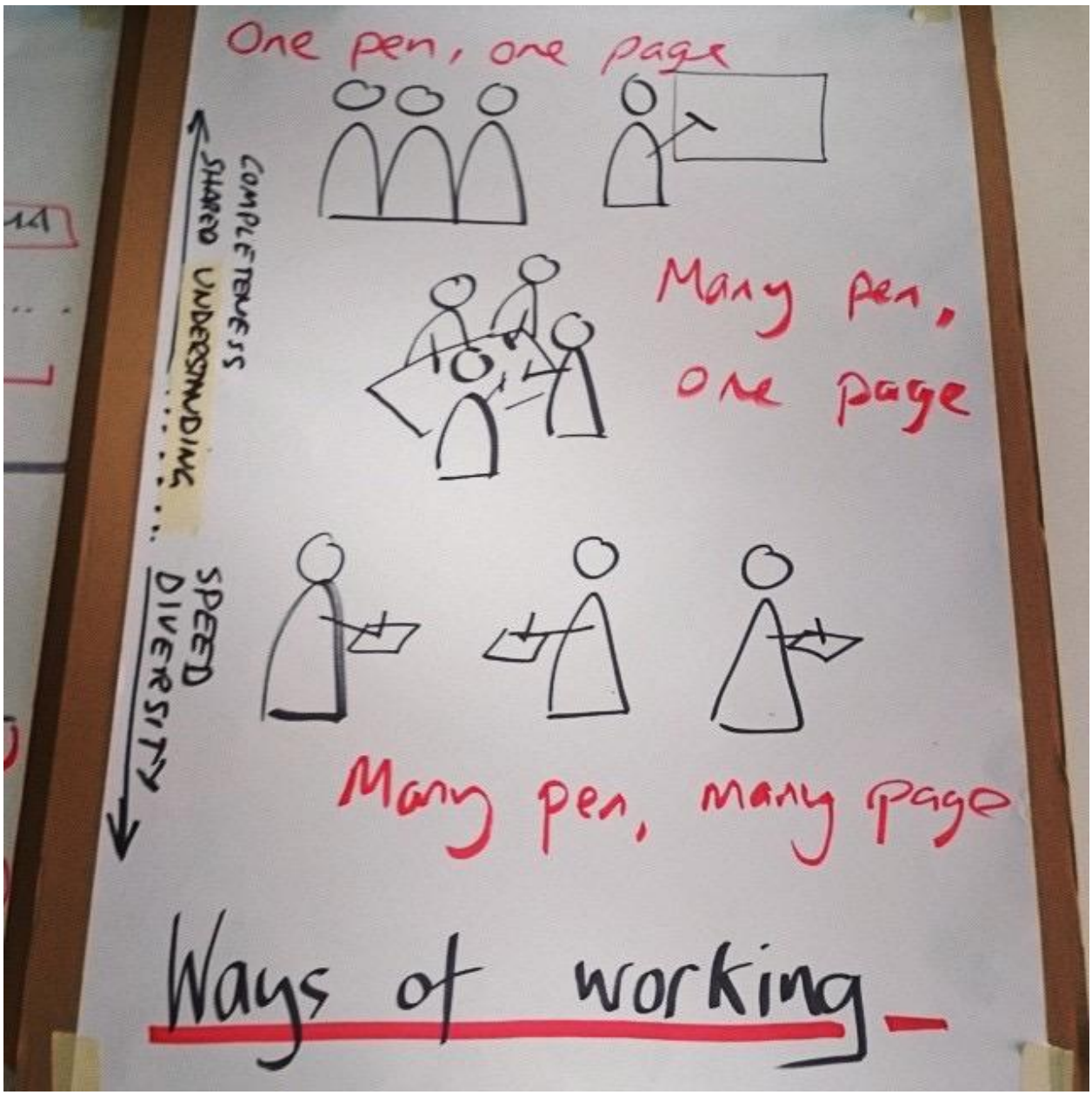

*On a typical one day workshop using a challenging and unfamiliar tool like Investigative Rehearsal, we might spend 2 hours establishing safe space before subtly slipping into the rehearsal phase. It might go like this*

*1. Powerpoint presentation (start in familiar territory, invoke authority / 20 mins)*
*2. Three Brain Warm-up. (break with routine / 15 minutes)*
*3. Rules of Rehearsal at flipchart, rearrange room. (ease in / 10 minutes)*
*4. "Yes, and…" game. Split into teams. Storytelling games about the situation today to generate material for later.(ease in / 20 minutes)*
*5. Teams choose interesting stories to work on and give them a Hollywood Title. (safety net / 5 minutes)*
*6. Storyboard the scenes on paper "in 8 minutes". (make a mess, doing not talking, sh!tty first draft / 10 minutes)*
*7. Present storyboards to the group. (ease in - this is the first time anyone has spoken to the whole group, but it is a familiar situation / 15 minutes)*
*8. Prepare to show the scene. Tell groups "We want to experience the scene here in the room, just a quick first version up to 3 minutes long. Decide where it will happen in the room, and what you will need. Decide who will be each person in your storyboard. You have three minutes to prepare and walk it through. One rule: nobody plays himself." All teams prepare at once Don't use the worlds "act" or "role-play". (avoid killer words, sh!tty first draft, doing not talking, offer safety net / 3 minutes)*
*9. Watch all the sh!tty first drafts, without comments but with applause. (avoid judgement / 10 minutes)*

*10. Move straight into real investigative rehearsal (Chapter XXX) without a pause (ease in)*

## 5.6 Work Modes in Teams

Whether “brainstorming”, discussion or prototyping, group work in teams has three basic forms. Each of them has its own strengths and weaknesses, but only one of them is commonly used. Look out for them in groups – consciously switching between them can be a useful tool. We describe them as if the task was a written one like drawing up new ideas, but the models apply equally well to working on a prototype. In chapter XXX we give examples of using each mode consciously in various project structures and in each method.




### 5.6.1 One page, one pen.

All the group members are talking and one person is writing – either taking notes on a pad or device, or sketching on a flipchart or board for all to see. Although status within the group plays a role, the “hands on” person has a basic choice between being a servant or a king. If he chooses the servant option, he will write down or draw group consensus and the task will probably keep him from taking much part in the conversation. Instead, he tries to make a fair representation of the other guys’ work.
If he were more ambitious, he could choose to be more hesitant to write on the board, waiting until he agrees before writing a point down, or shaping his notes to his preferred

slant on the discussion. With various degrees of subtlety and success, he could take the crown of the king.

“One page, one pen” is the default mode for most groups. It is familiar, and has the strong advantage that what comes out has coherence, basic consensus, and is understood by the whole group, especially when the work has been visible to all. But this consensus has a price – more diverse ideas and opinions have already been ironed out. We have a narrow, “pre-digested” outcome – and it is very slow in comparison with the other modes.

### 5.6.2 One page, many pens.

In this mode, the whole group sits or stands around a shared work surface. Everyone is writing, drawing, amending the same drawing or text. There might be discussion, or they might work in silence. They share their time between writing and drawing, and looking at what the others are doing, what they are changing.

This mode is reasonably consensual. Afterwards there may be a need to tidy up and explain some of the work to each other, but there is usually a basic understanding of the shared ideas. The technique is messy, but quite fast. Conflicts and differences of opinion are usually quite visible on the page as crossings-out or notes and might be the start for a good discussion afterwards.

This mode also works digitally: when writing publications, we often use Google Docs to write simultaneously in the same document. We don’t have any verbal channel open – we simply write, or sit back and watch the other cursors before dropping in to rearrange, rewrite or add emphasis and examples. Specific web-based software tools like BlankCanvas or Spacedeck can make this even easier. It’s a surprisingly smooth process and very effective. In workshop settings with smaller groups or dispersed team members this might be a powerful tool.

### 5.6.3 Many pages, many pens.

The group consciously split up and work as individuals. Each one writes on their own pages, usually writing or sketching one idea per page. Often, the group sets itself a goal of an ambitious number of ideas in a fixed time period. This encourages them to keep looking after the obvious ideas have been recorded, sketching even wild ideas as they try to fulfil their goal. When the time is up, they come back together and show the group their results.

The group can use this mode to develop many ideas in a very short time. Some ideas will probably occur several times from different group members, but there will still be far

more diversity than with either other mode. On the whole, this method is fast – but it does not bring a shared understanding. Some of the ideas will need to be explained to the rest of the group, and this will take some more time after the sketching is completed. The group will also need to decide which ideas to take forward, either by discussion or using selection matrices or portfolios (see for example the “Idea Portfolio” in chapter XXX).

## 5.7 Key facilitation tools

### 5.7.1 Warm-ups

Warm-ups can be enormously valuable or a colossal waste of time and good will (see chapter XXX for some warm-ups we like to use). They can help to “break the ice” in a group, help members get to know each other, get people comfortable in a space, make ideation more effective, help teams let go of ideas, help people to be happy failing, and wake people up in the natural low points of the day. Badly chosen or framed, they can also cost you the respect and consent of the group.

If possible, pick warm-ups which have a secondary affect, and explain the thinking behind your choice after the warm-up. Some warm-ups, for example, are great models of communication patterns or show us valuable behaviour for group cooperation. Others demonstrate a point. Nearly all of them are ideation boosters.

Rather than doing warm-ups automatically at the start of the day and after lunch, think about placing them more carefully. A powerful warm-up can be a great way to start opening a “safe space”, perhaps after the introductory talks are over and the VIPs have left. For a better ideation result, give the challenge first, then move straight into a warm-up which demands complete concentration. This will stop them thinking about the challenge for a few minutes, and this has a proven positive effect[17] on the ideation which follows. And people are usually pretty fresh directly after lunch, so make space for a warm-up an hour later instead, when they are really battling their biorhythm.

Combine warm-ups with other functions to be doubly efficient; rearranging the room into a new configuration is a great way to mark a new step in the process. Add some fun music and a tight deadline and it becomes a great warm up too (the same goes for tidying the space). Or instead of boring introduction rounds, have the participants map out their organisation, skills or physical world by where they stand in the room - “Here is the centre of the city, that way is north. Stand where you live. Did you know you were neighbours? Where’s the best place for coffee in your neighbourhood.”,  “Map out your

[17] Reference here, italian restaurant test

organisation in by standing with people you cooperate with … who connects your groups?… who is missing?". "Stand in a line according to how long you have worked in this field … look at the other end of the line. What could they teach you?" A game like 35[18] (also called Benny Hill Sorting) is a highly efficient work process that also works as a warm-up. If you have one of these activities coming soon, a warm-up might not be necessary.

***TEXTBOX*** *Warm-up tip from Adam – I prefer warm-ups with a physical, spacial and mental component, and with a fun-factor. If people are concentrated, moving and laughing, it's going to be a good warm-up. And if we are having fun failing, we show a shared humanity and open a door to successful failure in our work.*

*(Image: "3 Brain, a warm-up with physical, cognitive and spacial elements.)*

### 5.7.2 Timing

One of the most powerful tools of the facilitator is time. Use deadlines throughout the day to keep the team moving forward and to adjust the level of detail and polish in their work. Very tight or "impossible" deadlines can help teams avoid wasting time on talking

[18] Thiagi's 100 Favorite Games, Sivasailam Thiagarajan, Pfeiffer & Co 2006

too much. Time pressure will encourage them to go for quantity instead of quality, staying away from considering detail too early in the process – the Sh!tty First Drafts mentioned earlier in this chapter.

An occasional countdown through a task will help teams use their time wisely and keep up energy in the room, and counting out the last seconds (or playing a “time’s up” song with a clear end) means no-one gets stopped mid-sentence. If a deadline must cut people off in mid presentation, find a supportive way to interrupt – a vigorous round of applause hurts least.

***TEXTBOX*** *Interruptions by Adam*
*At one event, the facilitators had chosen a “make a wish” metaphor for the session, and used a tinkling fairy sound played quietly from a phone whenever they wanted attention. If necessary, they would play it several times until the room was listening. It was gentle and playful sound which took a few seconds to notice, meant no-one had to raise thier voice, and also reminded us of the metaphor of the day every time we heard it.*

But be careful with these “impossible deadlines”. They are very powerful up to a certain point, but we cannot cut the amount of time for a task at will. Under a certain time, the task becomes meaningless and the participants will know that. Instead, play around with deadlines and see what works for your group. Give three minutes and they will gasp but knuckle down. Give ten minutes and they will expect fifteen, but give eight minutes and they will focus. Give twenty minutes and they will step out to fetch a coffee first; give eighteen or twenty one and they might not.

And not everything can be done at a sprint. A project also needs slower times for reflection, recovery and to make a satisfying dramatic arc (see chapter XX).

***TEXTBOX:*** *Timing tip from Markus – Don't have a visible clock in the room, especially one with a second hand. If there is no clock visible, you can use “liquid” time – secretly shorten deadlines to add pressure and increase energy; secretly lengthen deadlines if important discoveries are made or people have trouble with a task. If you hold up a sign saying “3 minutes to go”. Participants will not notice if you stop them 3 minutes, 2 minutes or 5 minutes after showing the sign.*

### 5.7.3 The Room

The room itself is one of the most important tools of a facilitator. We will talk about dedicated spaces for service design in Chapter XXX, but let’s consider temporary spaces here.

It's easy to consign this kind of work to expensive offsite locations with a "creative atmosphere" that help us "think outside the box"; but ask yourself what message that sends. It signifies that service design or indeed creativity is detached from everyday concerns, and can only take place in a rarified and specialised environment. It's far more interesting, useful (and sustainable) to take a normal conference room and transform it into a more flexible and stimulating space. It suggests that we can do this anytime and anywhere, and means that our colleagues' expertise and experience is just a short walk away. In one project, we worked on shopping centre customer experience using an empty retail unit in the centre itself as our studio. Research meant literally stepping outside the door.

If you have a choice of rooms, think about light, privacy and flexibility. Everyone loves light and air, and facilitation in a low-ceilinged, gloomy room is always much more difficult as the day wears on. But no-one wants to work in a fishbowl either, and a feeling of being "on display" can seriously inhibit creativity while vistas of glass cost you valuable wallspace. So if the room is very glassy, encourage participants to use the glass as a work and display surface, and perhaps hang blank paper at eye-height to shield them until the windows fill up.

Experiments[19] have found that the most effective furniture for creative groups was a combination of high tables and bar stools – they are restful for the legs but they also make it easier for people to get up and move around. A flexible selection is ideal, with light but sturdy furniture which can be moved quickly and even folded away. Rearranging the room several times throughout the day helps punctuate the activities and mark the process, as well as mixing up groups and breaking up hardening social structures in the space. If they do it themselves, it also helps the participants "own" the space (see Safe Space, earlier in this chapter).

***TEXTBOX*** *Tip Adam on The Room: If high tables and barstools are not available (often they are not, but talk to the staff restaurant), ask yourself if you even need chairs in the main workspace. I enjoy working in a fluid "standing" space with some tables near the walls to perch on and perhaps a few chairs for those who really need them. Ideally, there would be a comfortable sitting area for reflective phases nearby.*

### 5.7.4 Tools and props

Tools and other tangible items can enrich a room. One way is to have a core toolkit (standard pens, scissors, knives, tape, notepaper, sticky notes) on each workspace, and a central pool of shared resources like templates, cardboard, building bricks,

[19] Make Space: How to Set the Stage for Creative Collaboration, Doorley and Witthoft, Wiley 2012

figurines and other prototyping material. You can add to the mix by spreading some random portable objects around the room – toys, gadgets, ornaments, puzzles, even little bits of costume (or rubber chickens). It's startling how often they become part of an idea or prototype, and in themselves they can help establish safe space by prompting other playful, curious, empathic or experimental mindsets. It's worth remembering that some people simply think better if they have something in their hand[20].

You can never have enough wall space in a room (read more on this in chapter XXX: making space). Participants should keep their material visible by hanging it on the wall, letting them constantly discover new connections and trace ideas back to their origin in research insights. This eats wall space very fast, so it can be helpful to expand it with wheeled pinboards or simply big sheets of cardboard which can be moved around fast, leaned against tables, and laid to one side when not needed. If the space is very high, think about using a ladder to have another row of older work or key material hanging high above the active area. It's a great visual reference and stimulus, but it's never in the way.

### 5.7.6 Visualisation

With so much service design DNA coming from the world of product and graphic design, visualisation will always have a key place in the design process. Appropriate visuals speed up the process, allow for easy iterations, and get people on the same page very quickly. Compare a 4-page text document with many open questions to 10 quick sketches: only the latter will help you in a workshop setting. Visuals help enormously to make things tangible, helping participants move away from theoretical thinking into practical doing. Not least, you will rely on documentation after your workshops, and visualisations of any quality will be extremely helpful and authentic in this context.

Several key tools are primarily visualisations, from customer journey maps to value network maps. And many facilitators encourage team members to be visual – for example sketching ideas instead of writing them. A sketch contains more information than a short sentence, forces more concrete thinking, and can be misunderstood in very productive ways.

If you want participants to draw, don't show them your exquisitely drafted flip charts first. Use scrappy visuals yourself and tell them that stick figures are welcome, or give them a crash course in simple visualisation techniques. And encourage them over and over

[20] Michael Karlesky and Katherine Isbister. Fidget Widgets: Secondary Playful Interactions in Support of Primary Serious Tasks. In CHI '13 Extended Abstracts on Human Factors in Computing Systems (CHI EA '13). ACM, New York, NY, USA, 1149-1154.

again to be sh!tty, not pretty. Remind them that most of the visualisations they create will be only for the team, and will be left behind soon.

You can use visualisations yourself to help teams through the project. A visual overview of the whole project process prominently displayed on the wall can reassure participants of their progress when everything seems confusing. And many tasks are best explained by sketching out the steps and deliverables as a quick storyboard or mind map, and by showing examples.

### 5.7.7 Post It or Lose It – The Expert's Guide to Sticky Notes

If there is one tool which has become the epitome of service design it is surely the sticky note. Search for service design workshop or design thinking on an image search and you will find thousands of pictures of people pointing at yellow, green, pink and orange squares.


(Image: sticky notes)

In fact, sticky notes are enormously useful – they hold a bite-sized piece of information and let us organise and sequence it easily, then change our mind.  But they can be even more powerful if we use them intelligently.

Encourage participants to both chose and mark their sticky note consciously, not just grab the nearest one. Encourage them to use one colour and size of note, and one colour and thickness of pen for the same level of information. (Make this easier for them by only having one type of pen in the room and specifying the note colour for each task.) This lets you use other colours and sizes for other levels of information like group headings and themes. It also makes it easier to find connections and groupings within the clusters of notes.

If you use many colours, shapes and pen sizes, your subconscious will furiously search for patterns in the format, not the content. This happens even if your conscious mind knows that the format is meaningless.

On the second day of a workshop, or after lunch, the floor will be usually be littered with notes which have fallen off the wall. It's annoying and it costs us data. Sure, we photographed them the night before, but who is going to pull up the pictures and start looking for one note? Instead, teach your class to pull sticky notes correctly so they stick better. Holding the pad in your hand, don't lift the note towards your face, curling the paper. Instead, snap down towards your belly so the note comes away flat. (Alternatively, for example when the pad is thin, peel from the back of the pad). A flat note will stay on the wall far longer.

>>> TEXTBOX Tip from Adam: I use my sticky notes one-colour-at-a-time like this, as it seems to work best. Other colleagues use wild mixes of colours and pens to create a colourful chaos when they think the group needs this shock treatment or craves a release from grey thinking. That's a great and valuable point, but the cost of the colourful inspiration is a slower process, and irritation for some people who like structure.

### 5.7.8 Space, distance and positioning

As a facilitator, one of your most powerful tools is your own body and physicality. The entire room is a three-dimensional stage which you can use in many different ways. Do you sit with the participants, hover near them, or have your own territory? When will you step firmly into the centre to get attention and focus, or withdraw into a corner to let them get on with it? You can fade into the group to observe something together, or stay at the front to present it to them. You can stand closer to one person to help her pay attention – even step into her personal space (directly behind her is most effective) or if appropriate lay a hand on her shoulder to really make the point.

Be conscious of relative height as well – there are times when you should stand when the group sits, times when you should sit or stand with them, times you should sit while they stand. When would you stand on a chair, squat beside someone, even sit on the floor? When do you take eye contact, when do you let it slip away? When do you spread out your arms, or put your head in your hands?


(Image: a facilitator uses height and position to interrupt and manage group)

Much of positioning strategy comes down to two basic arrangements called parallel or triangular positioning. Parallel positioning is where two people (or two groups, or a person and a group) stand or sit directly facing each other, their shoulders forming two parallel lines. It is the position of the interviewee to the interviewer (or the police officer), the two negotiation teams, the two shouting tough guys about to fight. This is an unnatural and uncomfortable position which feels confrontational. Triangular positioning is different. The two parties stand at two points of a triangle with facing the third point. The third corner is the material being discussed, the challenge, the problem. It is a more cooperative position, like two friends fishing in one ice hole, or mechanics discussing how to fix a dent in a car.

You can understand the difference between the parallel and triangular positions with a small thought experiment. Imagine standing parallel, face to face with someone who thrusts a document at your chest and says, “Someone screwed up here!”. You will feel

accused, confronted, defensive. Now imagine the two of you standing side-by-side by a table. Your partner slams the document down on the table with just the same vehemence and says the same four words in the same tone as before. As the two of you look at the document you know there is tension, but you feel that the two of you have a common problem, and you will approach it together.

This is not to say that a parallel position is always bad, or a triangular one is always good. Sometimes a parallel position can give authority, like the judge in court or the nightclub doorman. It can be a powerful position to take charge of a group, to call a halt to unacceptable behaviour, or to punctuate the day.

### 5.7.9. Feedback

Feedback (covered in detail in chapter XXX) is a very versatile facilitation tool. Team feedback “in passing” from a facilitator or mentor can help teams stay on track, break deadlocks or quietly suggest methods and tools which can take the process forward. More public feedback - perhaps from the whole room or from visitors - can give a team a broad selection of news ideas and input, and can also be used to punctuate the day, to give teams something to work towards and to force them to make provisional decisions.

Feedback sessions can be weighted differently to fit your needs. To keep teams on track and to diversify their options, keep feedback low key. Perhaps simply ask for “a one minute status report in five minutes”.  Teams will see this as a brief interruption in their workflow and an opportunity to get some input, but will not see it as a goal in itself, or a “gate” in the process.

To encourage the teams to filter and converge their ideas more strongly and perhaps make some tough decisions, present the feedback opportunity as a more significant event. Rather than asking for a spontaneous status report, warn teams well in advance that they will be asked to pitch or present their idea more formally to the group, to another team or to a visitor.

Feedback can be enormously time consuming, especially if open feedback methods lead to discussion. When planning, remember that closed feedback methods are faster. If there are several teams, decide if they get feedback in parallel (for example by pairing teams) or in series (for example in plenum).

*TEXTBOX Adam: Feedback as a gate or hurdle*

*To make a feedback round into a real point of convergence, hold a “Dragon’s Den” or “Shark Tank” session with visiting experts. These are especially effective if the session is quite formal and takes place in a separate room where the team is alone with the experts and perhaps a facilitator. Other groups should be excluded, to strengthen the*

*impression that the feedback will be especially tough and honest. Teams can be quite shell-shocked after this experience, so don't end a session with this.*

### 5.7.10. Status

It is not necessary or even advisable to dominate the group all the time when facilitating, but neither is it helpful to always give the group what they want. A facilitator's unique role as a leader of the process and a servant of the group gives him the ability to use his status as a tool, varying it as needed. The ability to elegantly move along a spectrum between "high" and "low" status can be a crucial tool and form part of a facilitator's personal style. Our choice of words and use of artefacts can play a part, but because we are monkeys, much of this can be done with voice and three-dimensional positioning in the room.

At your next trip to the zoo, spend some time watching the baboons. The one sitting still, high up on the rock and looking everyone in the eye is the boss. He's a real power-dresser, with broad shoulders, laconic loud voice and head held high. Around him we have all the guys looking busy, chattering and stealing sideways glances at him and at each other. And at the edges, we have the youngsters playing and one or two smaller individuals who sit quietly with their backs bent, eyes on the floor. That's about all you need to know about status in one scene. There are always exceptions, and a lot will depend on your own physical stature, gender and personal style in the context of your local culture. But as a rule, to raise your perceived status, go physically higher up (stand closer or straighter to seem higher), look at people directly, keep movements purposeful and speak in shorter, firm phrases and words. To decrease your perceived status, go lower, look down, move aimlessly or fidget, speak quietly and don't finish your sentences.

It's important to remember that taking a low status does not mean surrendering control of the process (even if you claim you are doing exactly that). This is not about how much you control, but about giving participants the impression of having more or less freedom themselves, and finding ways out of a some categories of conflict. Sometimes, it is useful to go lower status to regain control. Table XXX (needs a snappy title like Status-Control Matrix) makes this clear, showing how we can keep a tight or loose rein on a process from different status levels[21].

[21] Developed by Samuel Pickands with Adam Lawrence, based on experiences as a military officer and nightclub doorman, respectively.

| Table XXX | Relaxing control of the process, gathering ideas. | Checking where we are | Controlling the process |
|---|---|---|---|
| **Speaking from high status** | What options do you see? | Did you have something you wanted to talk about? | I see you have concerns. Let's hear them. |
| **Speaking from peer status** | What ideas do we have? | What I think I hear you saying is… | You had another idea? Let's see if it improves the plan. |
| **Speaking from low status** | What would you do in this situation? | What's on your mind? What do you need? | How can I help you? |

***TEXTBOX*** *Using low status to keep control*
*In one design session, the facilitator felt he was losing control of the group and the situation was getting critical. Raising his status would have led to confrontation in that context, so he went low. From a standing position, he sighed and slumped suddenly into a chair, scanned the floor with his eyes, fiddled with his pen, and then looked up at the group with a hangdog expression. "You guys are killing me today," he said quietly. "What do you suggest I do? Shall I cancel the session for today, or,… well,… (shrug)." After letting the group react – mostly by looking at each other in silence - he began to take control of the situation again by saying, "Is there any reason we can't move past this today? Are there any facts we don't have? OK, so … what can I do which will help us crack this in the next half an hour?" In effect, he consciously crashed from peer status down to very low status, then moved through the bottom row of the XXX table, from left (low status, low control) to right (low status, high control).*

### 5.7.11 Doing, not talking

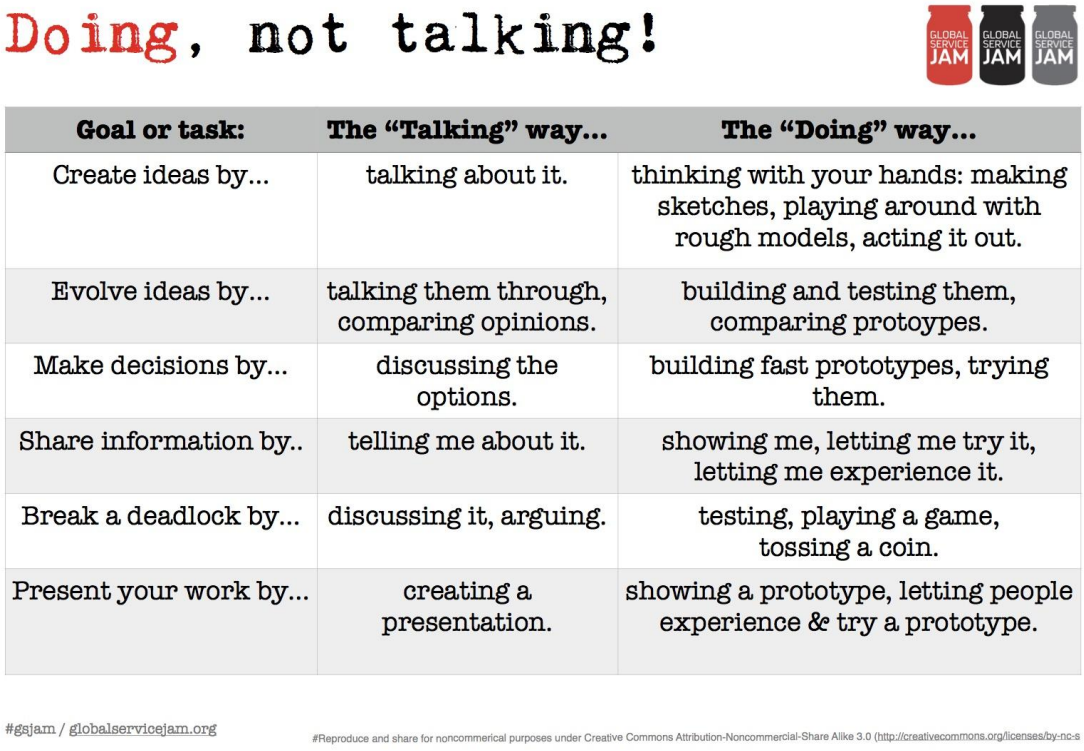
At Stanford's D-School, one of the core beliefs is a "bias towards action[22]". At the Global Service Jam[23], where thousands of people in a hundred cities try to create new services in just a few hours, the cry is a simpler one: "doing, not talking".

As well as being a great way to keep moving forwards, this attitude can help a facilitator in many critical situations. Often, an efective way to break past a creative or interpersonal lock-up is to change the working method or communication channel – leaving the verbal and switching to other ways forward.

Table XXX is from the material which the Global Service Jam gives to its volunteer hosts. It suggests alternate, "doing" ways to keep a process moving. For example, if a team is arguing about which of two ideas is the best, Jammers would split the team into

[22] See eg. https://dschool.stanford.edu/groups/k12/wiki/548fb/Bias_Toward_Action.html
[23] See www.globalservicejam.org

two subteams and have each one build a quick and dirty prototype of the ideas. This usually makes the discussion redundant, as the prototypes quickly show that the ideas are mutually compatible, that one is clearly better, or often that both groups meant basically the same thing.



Doing, not talking!

| Goal or task: | The "Talking" way... | The "Doing" way... |
|---|---|---|
| Create ideas by... | talking about it. | thinking with your hands: making sketches, playing around with rough models, acting it out. |
| Evolve ideas by... | talking them through, comparing opinions. | building and testing them, comparing protoypes. |
| Make decisions by... | discussing the options. | building fast prototypes, trying them. |
| Share information by.. | telling me about it. | showing me, letting me try it, letting me experience it. |
| Break a deadlock by... | discussing it, arguing. | testing, playing a game, tossing a coin. |
| Present your work by... | creating a presentation. | showing a prototype, letting people experience & try a prototype. |

#gsjam / globalservicejam.org



In a "doing not talking" mindset, ideas are generally evolved by pragmatically iterating on the prototype, instead of making hypothetical leaps through discussion. A "bias towards action" in any co-creative session will usually keep things moving more smoothly, as well as giving more opportunity to the team members who are less verbally dominant.

Of course, group work will always be a combination of doing and talking, but facilitators can play with the balance and with the sequence. Do you talk first, then build? Or do you build first, then talk? Experiment and see what works for you.

## 5.8 Growing as a facilitator

Facilitation is a complex and challenging theme, to which some people dedicate a lifetime. But as a practicing service designer, facilitation will always be a key factor in your success or failure. As you work, you will invariably discover and experiment with different facilitation styles and techniques. You can even look outside your own discipline and consciously learn from other facilitation experts, such as Agile coaches, therapists, sports coaches, hosts of Jams and other innovation events, practitioners of Applied Improvisation, and many more.  It's also valuable - and appreciated - to ask participants for feedback on your facilitation style after each session or project.

As you spread service design thinking through your organisation or professional context, you will find yourself teaching others to facilitate, and develop a community of practice not just for design tools and methods, but also for facilitation. You will find that every facilitator is different, and that what works for one will not work for others. Embrace this diversity - we can all learn from each other as we develop our own styles of facilitation.

O'REILLY®

# Discussing Design

IMPROVING COMMUNICATION
& COLLABORATION THROUGH CRITIQUE

Adam Connor & Aaron Irizarry
Foreword by Russ Unger

[ 6 ]

# Critiquing with Difficult People and Challenging Situations

We work in diverse settings; our teams are made up of people with different skillsets, backgrounds, experience levels, and approaches to building products. Diversity is an important aspect in creative collaboration. These differences between teammates means that we can draw inspiration from a wider array of possibilities; we have more material with which to build connections, increasing our chances of finding new, innovative solutions to the challenges we're trying to solve.

Yet, bringing people together in this way also means we need to be aware of and prepared for the challenges that are bound to arise. Take a group of individuals, put them together, and give them problems to solve, constraints, and deadlines, and it becomes inevitable that we will run into situations in which communication becomes a bit rough. Team members will disagree or people will misunderstand one another while discussing their ideas and designs, sometimes making things uncomfortable and slowing down the task to which you've been assigned.

This is perfectly normal. In no way does the presence of these challenges mean that we should cease collaborating. The fact of the matter is that regardless of how much effort we put into setting up conversations and critiques the right way, there will be situations for which things simply don't go according to plan. Occasionally, there will be people who don't participate in a productive manner for any number of reasons.

When these situations arise, the key is to identify where or when it is happening, identify the source, and work to understand what the individual(s) is trying to communicate.

Chapter 5 looks at some key techniques and best practices for facilitating these discussions, whether they are with our teams or with clients, and discusses focusing feedback on critique in order to produce analysis that's useful to moving a design forward. But the question still looms, "What do I do when others don't follow these suggestions or best practices?"

We might ask for critique and instead receive a list of requested changes. Or, we might get back a description or drawing of the solution that someone else thinks we should have come up with. We might get comments like, "This is horrible" or "Great work!" that leave us with very little understanding as to whether our designs might actually meet our objectives. And, we can expect that at some point in our careers as sure as the sky is blue we will encounter someone with whom it is just plain difficult to converse.

It should be noted that not every person providing less-than-useful feedback is doing so with underhanded, world-domination driven motives. Some individuals are trying to be helpful but are going about it the wrong way. For most situations, we've found that although our initial reaction to these situations might be negative or defensive, it's important to recognize that the feedback we receive from others might be founded in something that's worthwhile to understand. Even though we can't stop unclear or negative criticisms, we can change our perspective and try to find something of value in them.

## Central Idea

There are going to be times when conversations and situations become challenging for a variety of reasons. Be prepared for them and don't lose heart. Understanding the situation you're in is the first step to forming a plan to work through these challenges.

## Dealing with Difficult People

Certainly, we'd all prefer not to work with "difficult people," but they can't always be avoided. Some might be difficult because they're quiet and difficult to extract information from. Some can be difficult because it's not easy for them to communicate the points they're trying to get

across. Others might be difficult because they have attitudes, intentions, or motivations that don't align with the principles of good critique or collaboration.

Whatever the reason, having tactics for working with and getting useful feedback from people like this is important.

### SETTING THE RIGHT EXPECTATIONS

Sometimes, difficulties arise when people have different expectations about what they're being asked to do or how to do it. Addressing this is pretty straightforward. As is discussed in Chapter 5, making sure participants are aware of the format of the critique and how you plan to facilitate it is important in and of itself. It becomes even more important for situations in which we think some participants might present challenges.

It might seem a bit like overkill, but prefacing critiques like this can be truly helpful when participants or exchanges become challenging. Specifying the rules, structure, and focus for the critique at the outset can act as a preventative measure by encouraging people to pay more attention to how they participate and contribute to the critique.

Additionally, by communicating the rules of critique and specifying what we plan to focus our conversation on (see Chapter 5) ahead of time or at the beginning of the meeting, we have something to refer back to if during the course of the critique someone begins straying outside the rules or focus. As a facilitator, this strengthens our ability to address challenges as they arise and, by extension, keep critiques a safe, comfortable environment for our teams to discuss their designs and perspectives.

Along these lines, as we've mentioned before, posting the rules for critique in the meeting invite and the meeting room itself so that team members can become familiar with them and refer to them easily is very helpful, as is posting or documenting the specific goals and focus of the conversation.

### AVOIDING PERSONAL PREFERENCES AND MOTIVATIONS

As discussed in Chapter 3, many project teams and organizations that have trouble collecting useful feedback suffer from not having a common foundation, a set of decisions that frame and form the objectives of the product.

Having an agreed upon and mutually understood set of goals, principles, personas, and scenarios not only provides for more useful and relevant critique, it also serves as a great tool for refocusing conversations on the product and away from criticism that is rooted in personal preference or misaligned motivations.

Depending on the details of the critique we receive, we can ask the individual to frame it in relation to a goal, scenario, principle, or persona. For example, consider the following dialogue:

> **Critic:** There are too many things to click on this screen! I think we should move some to other screens. It's too confusing.
>
> **Designer:** OK. Can you tell me a little more about your concern? Is there a particular persona or scenario that this is likely to be problematic for?
>
> **Critic:** Any of them. There's just too much... I dunno, maybe the service rep. If I was a service rep on a call with a customer I wouldn't be able to find what I need to click on with all of these options.
>
> **Designer:** Great. Let's think more about that. We know that when a call comes in, CSRs are trying to handle the customer's request as quickly as they can. And part of the issue in the current scenario is that the options they need are buried within too many different screens.
>
> **Critic:** Yes, but there's just so much going on here. I'm concerned they won't know where to click.
>
> **Designer:** OK, so it sounds like you want to make sure that the options are well organized so that CSRs can find them as quickly as possible. Is that accurate?

In this example, by pulling in the foundational elements of the CSR persona and information from a scenario involving their use of the screen being discussed, we're able to take what might start off seeming like personal opinion and bring it to a concern that we can further discuss in the critique and, if relevant, work to address in the next iteration.

This also highlights the importance of knowing about our product's users and their needs, behaviors, and so on. Having solid, relevant research that we can reference is a great way to make sure your critiques stay grounded.

## Central Idea

Addressing difficulties that come up during the course of a conversation entails being able to identify issues and having tools to address them. Setting up conversations with shared references such as rules, objectives, focus, and so on provides a foundation for us to use throughout the critique.

### PREVENTING SURPRISES FROM QUIET PARTICIPANTS

Why can quiet people be difficult? Because sometimes they're a ticking time bomb.

OK, maybe that's a bit alarmist, but we've seen quiet people be problematic on more than one occasion. Sometimes, these individuals have something valuable to share, but for any number of reasons they don't share it during the session or even with you at all. There are times when this silence is a result of someone feeling overwhelmed by the process and subject matter. Other times it mght be because they are afraid to provide information that might be considered "wrong."

Instead, they share it with someone else, perhaps another teammate or a manager, and then the comment travels person to person until finally making its way back to you, days or even weeks later when you might no longer be able to act upon it.

When collecting feedback in a meeting, look for people who are not saying much. Take steps to ensure that they have opportunities to share their thoughts by asking them for feedback, directly if necessary, and try to make them feel more comfortable. It can be useful to frame the feedback request as something relevant to their specific expertise or skillset.

Be cautious, though: you don't want to overwhelm people by continuously putting pressure on them to contribute. If you get the sense that an individual just hasn't found something useful to say, leave it at that. It could be that they're just quiet or shy, and your best approach could be to try to talk with the person one on one after the session.

### USING LADDERING TO EXPAND ON FEEDBACK

Ever hung out with a child around the age of 3 to 6? If so, then you know what it's like to be asked the question "Why?" over and over again. Children often do this when trying to get adults to explain challenging concepts to them.

The repeated asking of the question "Why?" can be used to help an individual to gradually get more specific or provide more details about a subject. *Laddering*, a technique commonly used in design research, uses the repeated asking of "Why?" in various forms to understand the cause or rationale behind a statement made by an interview participant. Specifically, with each answer the individual provides, we respond with a form of the question "Why?" as a way to get him to provide more information until we reach a logical stopping point. A similar method, called the "5 Whys," is often used in projects to determine the root cause of a problem to be solved.

This same basic technique can be applied in design discussions when we want to understand more about the feedback someone is giving and why they're giving it. This is especially helpful when someone provides feedback that we sense may be related to her personal preference. By asking her "Why?" progressively, we're likely to get one of two potential results:

- As we continue to ask questions about the feedback she has shared, we will uncover details about what she is trying to communicate in a way that ties back to the objectives of the product. Or...
- We may lead her to realize that her feedback is based more on her personal preference and motivations rather than the objectives of the product and therefore it should be left alone and the conversation can move on.

For example:

> **Stakeholder:** I think we should use less blue in the design.
>
> **Designer:** What is it about the design that is leading you to think that?
>
> **Stakeholder:** It's too much. If I squint my eyes, blue is the dominant color.

**Designer:** Why is it important that blue not be the dominant color in the design?

**Stakeholder:** We're trying to stand out from our competitors, and almost all of their sites are some shade of blue.

The way you ask "Why?" is very important to the success of this technique. In some situations the simple question of "Why?" can be seen as interpreted as aggressive or accusatory, and that sense can become significantly stronger with repetition. So it's recommended that you work toward wording your why's in a way that is more akin to an invite for the individual to continue sharing.

### ATTEMPTING DIFFERENT DYNAMICS: ONE-ON-ONE CONVERSATION

People's behaviors and attitudes in a conversation can change depending on the size of the group conversing as well as the people who make up the group. Sometimes, it's these factors that are the cause for someone to be difficult to work with in a feedback discussion.

People can become uncomfortable or intimidated by large groups or a subject matter (design) with which they are not very familiar, so they withdraw. Others might try to dominate a conversation. Some people will have strong or combative personalities and become disruptive during critiques. As you work with your teams and clients, observe how they communicate and interact with others and make note of any concerns so that you are aware of them before you get into a meeting or critique with them.

Adam and I have found that in cases for which you know or suspect someone might have these kinds of challenges—they might have difficulty speaking up in groups, or they can be intimidating to a fair number of team members, preventing them from speaking up—reaching out to these individuals in advance to analyze the work with them alone and collect their feedback can prevent tough situations during the group critique.

First, by talking with them prior to the meeting, we will have already discussed the designs, which for individuals who have a tendency to intimidate others can lead them to not be as vocal during the meeting. This is because they have already provided insights, which can preclude opportunities for them to be difficult or disruptive during a session. Alternatively, if they do become challenging in the critique, we can refer back to the feedback and any agreements from your prior conversation with them and keep them accountable to those commitments.

We have also found that talking to these types of participants in advance can often make them feel that they have received your attention and have been heard. As a result, they sometimes feel that they can then forego attending the group critique, which can be helpful if their presence might have hindered other participants from giving useful feedback.

## Central Idea

To deal with issues that can come up in a critique, you need to know what kinds of questions to ask as well as knowing when to ask them, even if that means doing it as part of a separate discussion.

## Coping with Challenging Situations

Difficult people can show up at any time in any environment. We've already talked about some strategies for working with them, but hopefully, as you read the previous sections and thought about your own experiences, you've realized that in many cases, it isn't the person themselves that is inherently difficult, it's the situation or the way in which certain individuals deliver their feedback.

Here are some common situations that we've observed in the organizations we've worked with and some techniques for working through them.

## CRITIQUING THE WORK OF SOMEONE AVERSE TO CRITICISM

Sometimes, the difficult situation lies not in receiving feedback, but giving it. As we know and have discussed, receiving feedback can be hard to do without taking it personally. Some people will take it better than others.

If we know that the individual whose work we need to analyze has trouble with receiving critique because they tend to get defensive or feel defeated, how do we go about making it easier for her? We don't want to hold back our comments. We need to be truthful. But we also need to show tact to keep the momentum and collaborative spirit of the team going.

Chapter 2 shares advice for giving critique, but here are some more thoughts when the person you're giving that critique to is particularly sensitive to feedback.

### Get them talking

Engage them. Get them talking about the design, about the objectives of the product and the elements or aspects of the design that are intended to achieve those objectives. For some people, receiving feedback can cause them to freeze up or go silent. Get them talking and thinking critically about the work with you. Ask questions. Keep it casual and conversational.

As they talk more, most people tend to relax. As you ask questions and they work to describe the design and provide more details, they'll likely begin to analyze the design and participate in the critique not just as a recipient, but as a critic as well, which tends to make them more receptive.

### Talk about the work, not the person

With people who are particularly sensitive to feedback, it's even more important to ensure that the conversation you have and the language you use center on the design and not the designer (see Figure 6-1).

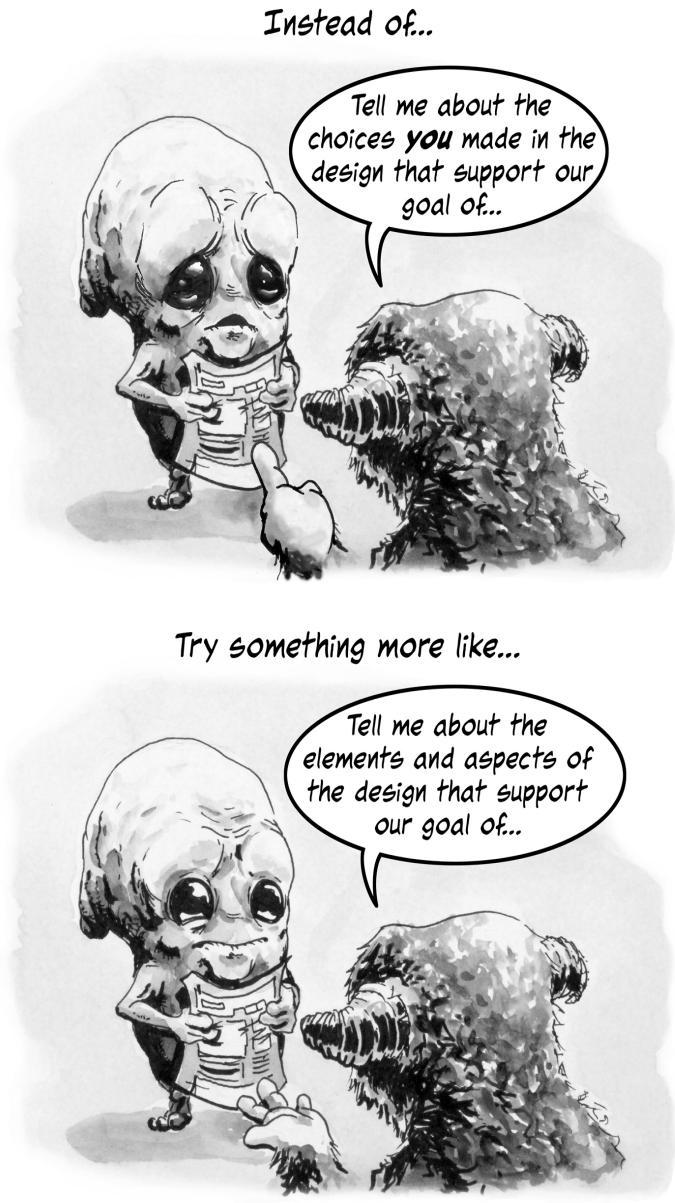



**FIGURE 6-1**

A demonstration of how to frame questions and critique on the design rather than the designer

This can be tricky. In critiques we want to make sure that the discussion includes the thoughts and reasoning people used when making design decisions. However, the more our questions seem to be about the designer, the more individuals who are sensitive to feedback can feel like the feedback is about them and not the design.

### Emphasize that the critique is about iteration

When you're sensitive to feedback, it can be easy to forget that critique is about iteration and that the reason for critiquing work is because you plan to continue working on a design and use the insights taken from the critique to make it stronger.

Remind the recipient of this if you can during the feedback. Let him know that you're curious to see what he comes back with in the next iteration. If you've critiqued this work with him in the past, talk about how things have improved over the past iterations.

### The sandwich method

The sandwich method is an often-talked-about method for delivering negative feedback in management circles. In it, you begin by presenting a piece of positive feedback, followed by the negative feedback you have, followed by another piece of positive feedback.

The idea is that by starting off positive you give the recipient a sense of success and support, so that when he receives the negative feedback you're about to follow up with, he doesn't feel as bad about it and his emotions don't fall as far. Then, another piece of positive feedback lifts his emotions again and, because there was more positive than negative, he feels like he's leaving with the scales tipped in a positive direction.

For as much anecdotal support as there is for the sandwich method, there is also a lot of criticism and skepticism as well as research that it doesn't work, mostly because of how it's often carried out. In many cases, the positive comments are superficial and or vague (Figure 6-2). They might be about a quality that has very little to do with what's being discussed, or about no strength at all really.

Most people can see right through these kinds of comments and they do little to help the situation. The initial praise or positive comment does little more than signal that something bad is coming. Additionally, because cognitively we expend more energy and attention processing

negative situations than positive ones, initial positive comments are forgotten as soon as negative comments are brought in. And for some, the whole method can feel manipulative.


**FIGURE 6-2**
An example of a bad feedback sandwich

We strongly believe that balancing conversation around strengths and weaknesses of a design is important in a critique. And we agree that starting off on a positive note can be helpful in setting tone.

Most important though, is that the positive comments be about real strengths in the design (Figure 6-3); they should be aspects that we have thought about critically and feel are effective and important to the objectives of the project, not just things we came up with at the spur of the moment to make a weakness we want to point out easier to handle.

Don't worry about the "sandwich". Be honest with the recipient. Balance the conversation. Think critically about and discuss the elements of the design that work for and against objectives. And don't manipulate or make up insights and feedback just to try and make things easier.

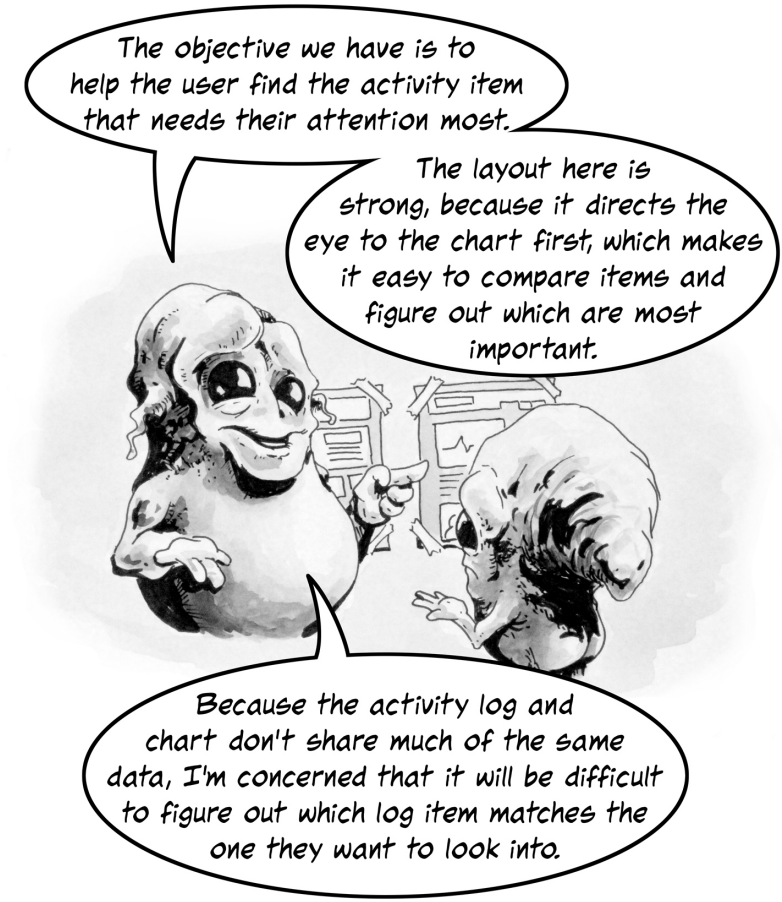



**FIGURE 6-3**
An example of a balancing discussion of strengths and weaknesses

### RECEIVING UNSOLICITED FEEDBACK

If feedback only ever happened when we ask for it, would it ever happen at all? The truth is feedback happens all the time whether we ask for it or not. Sometimes, it's conscious feedback, someone deliberately responding to something we've done by making comments or suggestions or asking questions. Sometimes it's subconscious. We might create or do something and notice a subtle change in someone's demeanor or behavior, or maybe a facial expression.

Feedback is a regularly occurring and natural part of our interactions with others. Whether we're solo creators or part of a team creating something, if we set a goal of wanting to improve our creations, we need to understand that feedback is constantly happening outside the situations in which we've requested it. It's up to us to recognize when feedback is occurring, work to understand what that feedback is telling us, and determine if it is useful in our work and whether we should pay attention to it.

### Step 1: Be ready

Understanding that feedback occurs so frequently and naturally, it's best that we be proactive in thinking about how we want to handle it. Before sharing your work, even if you have no plans to ask for it, think about how you want to handle feedback. Spending a little time thinking about how you'll respond to compliments, questions, and critique can go a long way, not only toward making those exchanges much more useful to you as you iterate on your work, but also to helping you learn how to separate yourself from your work.

Separating yourself from your work can be difficult. You've put time and energy into what everyone else is now going to analyze with a critical eye. It's intimidating. One thing that has helped Adam and me to create this separation is remembering that critique is a tool that can help us produce better work. The focus of the critique is the product, not the person who created the work. If there is feedback that something missed the mark, it is OK, and the chances are pretty good that I am still an upstanding person. Critique is not about judgment, it is about refinement.

### Step 2: Hold on to your reaction

When unsolicited feedback to something you've created or presented occurs—it might be verbal (someone saying or writing something) or physical (a physical gesture via body language or facial expression)—the first thing to do is to hold back your initial reaction. It's inevitable that we'll have a reaction, and the more passionate or pronounced the feedback is to which we're reacting, the stronger our reaction is likely to be.

What we need to do is give ourselves time to process the feedback and decide what we want to do with it. Do we want to learn more about why someone feels the way they do about the design? Would knowing it be useful to us in improving the design? Are we in a position where we could use that information?

Keep in mind that this applies for both positive and negative feedback. Even though feedback is positive, it might not be helpful. Someone saying, "I like this" might make us feel good, but the question remains, what does he like? People will often offer positive feedback because they don't want to hurt someone's feelings, not necessarily because they think the work is heading in the right direction. With all feedback, the best approach is to thank the individual for his feedback, be sure that you understand what he is communicating, review his feedback in light of what your known objectives are, and then follow up with questions.

#### Step 3: Consider the source and intent

What kind of feedback is it? Is it reaction, direction, or critique? Is it constructive or destructive? (We'll talk a bit more specifically about working with reactive and directive feedback in the next two sections.) If we can get a read on what type of feedback we're starting with, we can get a better sense of how to dig deeper to get something of value from it. The key question to ask though is "Why?" Asking "Why?" engages the critic and prompts her to explain and even rationalize her statements. Even feedback that might seem initially destructive can have some legitimate analysis behind it.

This doesn't mean that you should always engage with someone who is tearing your work apart. You should think about the source itself. If this is someone with a history of being a problem and you can ignore her comments, you probably should. But it might be someone who has something worthwhile to tell you and is just having some difficulty moving past that initial reactionary phase of feedback. Asking "Why?" often helps us see if this is the case.

You should also consider the view from which her feedback is coming. Is she speaking as a representative of the audience for whom you've created the design? Does she have expertise in a particular aspect touched upon by your creation? Or maybe she's just insightful? Again, the question "Why?" can help us determine the lens being used to derive the feedback we're receiving, making it possible for us to determine if we should pay attention to it in our next iteration or not.

#### Step 4: Listen, understand, and use it

If you've determined that the feedback might have something of use to it, you're next job is to listen. Pay attention. Be sure you really understand what you're being told. Use active listening and question for clarity by repeating back what you've heard but worded differently.

And finally, just as with any solicited critique, you can factor these new insights into your next iteration—assuming that you've determined they're applicable.

### DEALING WITH REACTIVE FEEDBACK

> Well... it's better than peanut butter and salami!

No kidding, Adam actually witnessed that feedback in a meeting. After an awkward WTF moment in everyone's heads as they looked around the room at each other and wondered what a comment like that could possibly mean, the team learned that it definitely wasn't positive. It roughly translated to, "It's not the most heinous thing I've ever seen, but it's close."

This kind of feedback is bound to happen at some point in time. It might not be as extreme as a noxious combination of sandwich fillings. You might just get a "meh" or maybe something on the positive side like, "I love it!"

Remember that reactionary feedback comes from the more impulsive of our mental processes. It can be positive or negative, and it can come from one of a few different causes, as described in Chapter 1.

In general, though, this type of feedback is the result of an individual expressing a gut reaction to what they are seeing. They haven't taken the time to think critically, moving past that initial reaction to examine it and uncover the cause for it.

And, as we've described, this kind of feedback isn't very useful to us as we work toward iterating and improving our creation. It doesn't tell us what aspects of our creation will or will not work to achieve our objectives. Therefore, it doesn't help us identify which aspects of our creation should be changed, explored further, or expanded upon.

There is, of course, the possibility that the critic is just being difficult or their personality makes it challenging to work with them. In this case, it is natural to want to tell someone to kick rocks. Although this can bring some temporary gratification, it usually only complicates matters in the end. It's natural to grow defensive when criticism is coming our way; we must resist that urge and focus on the best solution.

As with unsolicited feedback, sometimes people aren't being trolls and might actually have valuable insights. Look to find the balance between not feeding the trolls and not becoming defensive, and collecting information that might be useful as you iterate on your design.

The only way to get someone to move past the reactionary phase of feedback is to ask questions that push him to examine not only his reaction, but also the creation you're asking them to analyze. Remember, at this point he's really only just reacted. His slower, more analytical cognitive processes that facilitate critical thinking haven't taken over yet. By asking questions, we can help ensure that they do. By asking questions, we can work toward exposing and understanding what it is that led the individual to give his reaction. As we converse and try to gather insights, we can then begin to determine if the individual is trying to be helpful and maybe just going about it the wrong way or if he is trolling or voicing an opinion with no real desire to help.

It's also important as you move through this process to pay attention to how you word your questions. It's important to try to word things in such a way that they aren't misconstrued as defensive and adversarial. Instead, you're looking to invite the individual to provide you with more of his thinking.

#### Step 1: Get more specific

The first question to ask is pretty straightforward:

> Can you tell me a bit more about what aspects of the design aren't working?

Of course you'll reword this depending on the specific reaction you've received. The key point is to try to get her to be more specific. Get her to focus on specific aspects or elements of the creation to which she is reacting. This way, you can better focus the rest of the conversation by discussing those aspects specifically, or perhaps the part of the design that you're interested in gathering feedback on is different from what she's reacting to, and so you can now try to steer her toward only paying attention to that part of the design.

**Step 2: Talk about the "whys" and "hows"**

Presuming that you're digging deeper into the critic's reaction (as opposed to discovering that she's reacting to something irrelevant to what we're trying to collect feedback on and refocusing the conversation) the next step is to understand the following:

- Why is/are the aspect(s) she is reacting to terrible?
- How does that relate to the objectives of the design itself?

This is where having a solid foundation really matters. If the team has already agreed upon things such as personas, goals, principles, and scenarios, you can ask people to relate their feedback to those foundational elements.

By uncovering this information, you can begin to get to the core of what the individual's problem with the design might be. Adam and I have found that, oftentimes, using this approach you, together with the critic, will be able uncover whether the feedback being given is pertinent or a matter of the critic's personal preference or motivations. By doing so, you help the critic understand the process of critical thinking so that in the future she's better able to give critique.

It isn't easy to discern what someone's motivations are. How she responds to the questions will help in understanding if she really is trying to help and just having a hard time communicating, or if she has other motivations.

One way to work through these difficulties is to reinforce and remind her that you are on the same team and working together. Use phrases such as, "I need your help to better understand" or "We really want to make sure this product meets its goals, and your help is crucial in

accomplishing that." By doing this we can move away from a me-versus-you situation and put the focus on working together as a team to resolve differences and focus on the needs of the products.

Most, but not all, individuals will be cooperative in these situations and in those few cases of individuals who aren't, it is best to move on. If someone is nonresponsive to your attempts to reach out for clarification or he does not get any less difficult as the conversation progresses, this is probably a sign that you will not be able to make much progress with this person, and it will not be worth the time following up with him. In these cases, it is OK to thank the person for his insights and move on, focusing on collecting helpful insights on another topic or from others. Take note of how this person interacted so that you know what to expect from him in the future. In some cases, it might mean that you go about collecting his feedback in another way. In others, in which the individual is not a part of the project, it may mean that you exclude him from future critiques.

In the end, we should strive to see if we can get any information that can be used to improve the design by using some of the tips and techniques for facilitating critique we talk about in Chapter 5, even if we don't fully agree with an individual's overall assessment. Although it is not ideal when an individual's intent is not coming from a position of trying to be helpful, we can make the best of the situation by objectively analyzing the feedback he is providing, looking for anything useful.

#### Remember, this applies to positive feedback as well

When talking about feedback and criticism, it's easy to fixate on the negative. When we think about problems with getting feedback, that's where our minds instinctively go: to all the times when someone has berated us and told us our work is awful. Or, if it hasn't happened yet, we are consumed by the anticipation that it will one day, and what will we do then.

Nonetheless, we need to remember that reactionary feedback can be positive, too, even neutral. In these cases, even though our own reactions to the feedback we're receiving might not be so negative—it feels great when someone exclaims, "I love it" about something you've made—the feedback itself is still unhelpful in providing us with information to use in iterating on and improving our creation.

Thus, we still need to do our due diligence to ask questions and push people to think critically about our design and their reaction. What do they love about it? Why? How does it apply to our goals, personas, scenarios, and principles?

## DEALING WITH DIRECTIVE FEEDBACK

Many of us have been in situations in which instead of getting what we'd consider to be useful feedback on our designs, we get a list of changes to make to it or suggestions on how we might improve it. Often, this list doesn't include a clear indication of why the changes should be made. Beyond that, some of the changes might be things that are detrimental to the design and things we'd advise against.

The most challenging, and possibly most frustrating, of these kinds of situations is when we don't receive actionable critique; instead, we get a sketch or mockup for a new design that the person we've asked for feedback has put together on her own.

We sit and stare at the screen with a million thoughts and questions running through our heads and often a building sense of frustration and insult.

> How dare they!!! What do I do now?!?

### Step 1: Calm down and let your reaction pass

Step back and force yourself to remember that most people are not diabolical, intentionally hurtful people. You're having a reaction right now, an impulse. You aren't thinking critically just yet. Remember that most people are just trying to do the best job they can, and the chances are that this individual is not trying to insult you.

Creating her own design is not necessarily an evil act. In fact, in most of the situations I've encountered this scenario or observed other designers come up against it, it's merely due to the individual finding it difficult to articulate everything she wanted to say about the design and thinking it would be easier if she tried to show you.

Hmm… "*Show me. Don't tell me.*" Who does that sound like?

Correct me if I'm wrong, but hasn't the design community *en masse* used that as a kind of mantra to describe the inefficiencies we often encounter when trying to verbally describe things?

Similarly, getting a list of changes back as feedback might just mean that the individual has jumped to identifying solutions to the challenges she perceives rather than articulating those challenges back to you as feedback.

Of course, there is the possibility that the thinking behind the changes the individual is proposing might be personally motivated. The next steps in this process will work toward helping you identify if that is the case. Even if it is, it can be worth working to understand what this person is telling you, because you never know where a valuable insight might come from.

**Step 2: Take note**

Although she most likely isn't trying to play the role of your archnemesis, this does give you some insight into what your engagement might be like if you continue to work with this individual, and in many cases, you'll have to.

It isn't a bad thing. Good collaboration is rarely a natural occurrence. It takes deliberate action and consideration from the people involved. Getting a sense for how people share their thoughts and ideas can help you tailor how you work with them and increase the efficiency of your communications and idea-sharing back and forth.

Moreover, in the off chance that you're working with Satan himself, this might be one of your first signs...

**Step 3: Critique the directive feedback**

On your own, compare the contents and elements of the person's work or recommended changes and ask yourself the following:

- How does his design differ from yours? What specific changes is he proposing?
- Why might he be proposing these changes? What is he trying to achieve? What problems is he trying to solve and how is he trying to solve them?
- Did you try to solve for those same problems in your design? How? How does your solution differ from his?
- If you didn't try to solve for some of those same objectives, why not? Was it a deliberate omission on your part? An oversight?

- Looking at his proposed changes, what aspects of the design and its elements might he be indicating are of primary importance to him?

Make notes as you ask yourself these questions. But again, keep the notes to yourself. By doing this, you give yourself some time to step back and think objectively about what the individual might be trying to tell you.

**Step 4: Critique together**

Set up some time with the person who has sent you directive feedback to discuss the designs or list of changes. Thank her for her feedback and let her know that in order to refine the design you'd like to discuss some questions with her regarding the thinking behind the choices he made.

In your discussion ask about the differences you noticed between your design and her proposed changes and ask why he made or is recommending the change. Again, what problems is he trying to solve? What was it about your design that she doesn't think is sufficient to solve that same problem? If the solutions she's designed are problematic in some way to the design or product—perhaps because they go against best practices or research—ask her about it.

Also, ask specifically about the things she isn't recommending be changed or similarities between her design and yours. Why are they there? Did she keep them for the same reasons you made them?

Now, because you're going to be trying to facilitate this discussion as a critique, you want to make use of any tools you have that will help. Earlier in the project, did you establish agreed-upon personas and scenarios? How about goals and design principles? (*Are you all sick of us mentioning these yet?*)

If you did, have them at the ready. These are the perfect foundation for your discussion. Instead of just comparing the two designs to each other, or your design with the critic's list of changes, you can compare them in regard to all of the things that the team had previously agreed were important to the success of the product.

This helps remove some of the my-idea-versus-your-idea atmosphere that might be present and helps focus the conversation on what the right decisions are for the success of the product.

If you don't have these tools, this might be your opportunity to begin to generate some. As you discuss why he made decisions and learn about the aspects of the solution that are most important to him and his vision, you can talk about how this compares with the findings of any research that's been done, and possibly, on-the-fly generate some principles and goals that you can use to help focus discussions as the project moves forward.

Now, maybe your project does have goals and principles defined, but as you're going through the critique you're finding that they really aren't helping. This can be a sign that the goals and principles you set are too broad. Remember, when asking whether design options adhere to a principle, more often the answer should be "no." If your principles and goals are too broad, this can be your chance to refine them through your discussion.

Goals should be connected to something measurable. If during the conversation you find in trying to critique against a particular goal that you have no way to meaningfully measure something to determine if the goal has been achieved or not, you might need to refine your goal.

In the course of your conversation, your goal is to essentially construct a critique of your original proposed design using your critic's design or changes as a discussion tool. You should be able to learn which design decisions you made that don't quite work well enough to meet desired objectives and aspects that are important to the product and the client as well as how they aren't working. You also should have an understanding of the design decisions that are working.

Beyond that, if the individual you're working with is a teammate, stakeholder, or client, you should also be looking to come away with a better understanding of her vision and thoughts on how specific design challenges might be solved. Using that knowledge, you can incorporate elements of her solutions into a revised design where they work and fit best without compromising the integrity of the creation just so that people have something to point to and say, "I came up with that." Remember, a good idea can come from anywhere.

#### Step 5: Move forward together

Armed with a better understanding of your original proposed design you should now be able to iterate upon it in a way that strengthens its alignment with your research, design principles, and so on.

Of course, you have the option of ending your discussion by sitting down at your desk, making your revisions, and sending your updated design back out for feedback. But think about it for a second, and make sure that ending the discussion is the right thing to do at this time.

In most of the situations we've seen where this comes up, particularly when collecting feedback from teammates, stakeholders, or clients (as opposed to outside individuals), this approach is repeatedly problematic because it's exactly what caused the issue in the first place. The designer or team came up with their proposal and sent it over in an email with a few sparse instructions on how the client, stakeholder, and others should send back their thoughts.

You've got some opportunities here.

One possibility is for you to set up some time with the individual(s) and explore some of the changes together. Work together to generate multiple possibilities for a change and then refine them collaboratively. This gives you more insight into their thinking and gives you more opportunities to help them understand the design process.

Another thing to think about is how you'll collect feedback throughout the rest of the project. Not everything can be done together in real time. There will be times when you need to put something together and then get other people's thoughts in order to make changes. We've always found it's best to collect feedback in person (physically or remotely), because then we're able to structure and facilitate the conversation around critique.

For the situations in which someone proposes a change, we're immediately able to ask her why and get a better understanding of what it is she's trying to do. Yes, there are times when schedules are tight and we can't talk about everything we need to on our call, but by beginning the discussion in this way, we find that the remaining feedback that is sent by email is often much more useful than if all we'd done to initiate things was send her an email with our design and a request for her feedback.

If the individual is a member of your project, moving forward, consider reaching out to her a little earlier in the process. Share design concepts with her and, if appropriate, ensure that she is invited to team critiques. Be transparent with your design process and what you are trying to accomplish with your designs. Keep an open dialogue with the person.

Hopefully this will help the individual feel more comfortable communicating about designs with you and lead to more productive conversations and less bulleted lists or designs in response to your designs.

## Central Idea

When situations become challenging, try to steer the conversation back to the main concerns. Engage the person or participants with whom you are working by keeping the conversation centered on the product.

## Wrapping Up

Any time that we are collaborating with others, there are bound to be communication miscues, conflict, and frustration. This is the nature of working with people.

We are all different with differing personalities, character traits, and ideas as to how things should work. We should expect that there will be some level of communication gaps and even conflict, but by no means does this mean that we should enter working relationships looking to be combative.

Instead, we should be aware of the possible causes for these challenges and arm ourselves with tactics, a bit of extra patience, and a resolve to keep things focused on the project and its objectives, even if they begin to feel personal.

In this chapter, we covered different situations that you might encounter. Here are some of the key takeaways:

- Not all feedback is wanted, relevant, or actionable. This is to be expected and we should do our best to salvage what we can from it, if possible.
- When giving feedback to someone who has difficulty receiving it, be considerate, focus your language on the work (not the person) and the iterative aspect of critique, be honest, and balance the conversation around strengths and weakness.
- Facilitating reactive or directive feedback relies heavily on a methodical asking of the question "Why?"

- Ensuring that everyone involved in a group critique has an understanding of what useful feedback (critique) is and what the focus of the conversation should be on can go a long way toward keeping conversations efficient as well as providing tools to refocus them when they go astray.
- If someone has responded to proposed designs by sending her own versions of the design, take a step back and look at what she sent, analyze the differences between the proposed design and hers, and then follow up to discuss it with her.
- Use preestablished artifacts such as goals, personas, scenarios, and principles to center conversations.
- If you know someone is going to be difficult or tends to be difficult in meetings, communicate with that person ahead of time.

Communication is at the core of critique. When things start to go awry, the best way to get things back on track is to refocus the conversations on the objectives. Putting the focus back on the product can get to the intent of unwanted critique or situations in which someone is being difficult.