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DESIGN THINKING MEETS ADDIE

Kathy Glynn and Debra Tolsma

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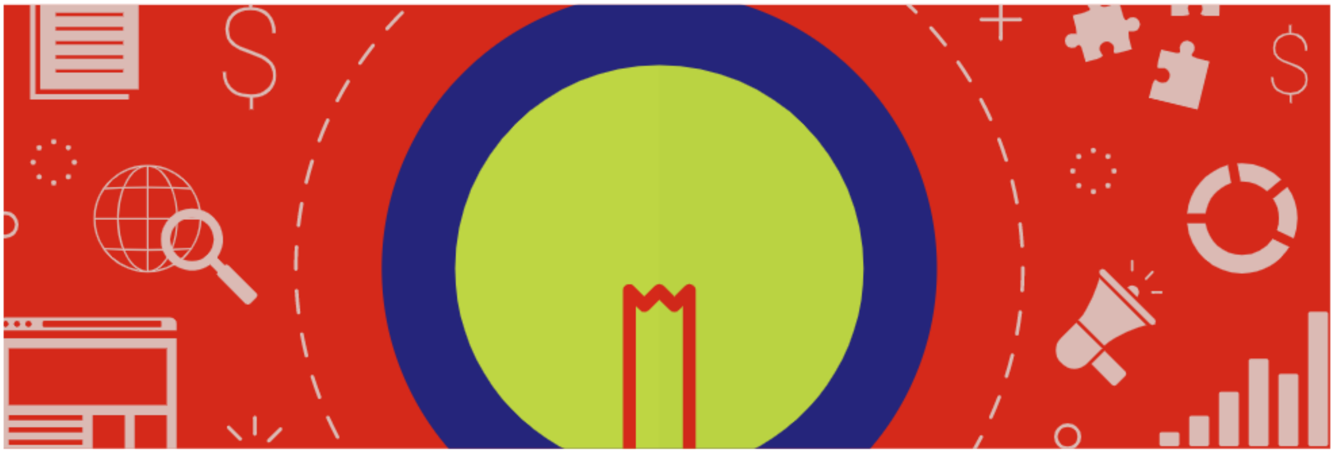

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What do you do when the senior executive of your function tells you to "innovate" and globalize leadership development? Besides hanging on for dear life, you turn to your company's innovation process and methods—human-centered design or "design thinking."

When we were first approached with this tall order, our dedicated learning and development staff, in partnership with human resources business partners around the world, were doing their best to address the pressing issue of leader readiness, yet we continued to miss the mark.

Blending design thinking methods with typical instructional design methods based on human performance improvement (HPI) and ADDIE (analysis, design, development, implementation, and evaluation processes) helped us launch a leadership curriculum that met the business needs of our project sponsor and global leaders, as well as their social and emotional needs. That's the magic of design thinking.

Rather than delving into the intricacies of design thinking, we will show in this issue of *TD at Work* how we used design thinking with traditional learning and development methods of ADDIE. In doing so, we will provide answers to these questions:

- What is design thinking?
- Why does it matter to me as a learning and development professional?
- How can I use design thinking with HPI and ADDIE?

WHAT IS DESIGN THINKING?

Design thinking is a hot topic right now. An Internet search will net some 23 million results. But what exactly is design thinking? Here are the definitions from some design thinking leaders:

- a discipline that uses the designer's sensibility and methods to match people's needs with what is technologically feasible and what a viable business strategy can convert into customer value and market opportunity (Tim Brown, CEO of IDEO)
- a halfway house between analytical thinking—for the purely deductive and inductive logical thinking that utilizes quantitative methodologies to come to conclusions—and intuitive thinking, or knowing without reasoning (Roger Martin, dean of the Rotman School of Management)
- the ability to turn abstract ideas into practical applications for maximal business growth (Jeanne Liedtka, professor at the Darden School of Business).

In addition to the multiple ways of defining design thinking, there are also a variety of design thinking methodologies from places such as the LUMA Institute, IDEO, the Stanford d.school, and the Illinois Institute of Technology's Institute of Design.

The bottom line is that design thinking is a human-centered approach to innovation or problem solving that instills deep empathy. It integrates the needs of people with the needs of the organization.

DESIGN THINKING AND THE LEARNING FUNCTION

Organizations are looking for better results, especially in leadership development. We chose to leverage design thinking within our established learning and development processes because we wanted to fully understand what it meant to be a frontline and first-time leader, what was working and not working, and what we could be doing better to support our leaders so they might be more effective and successful.

It takes deep empathy to understand what people want and need. That's why design thinking was such a natural fit for this initiative. It gave us the tools to uncover unmet needs, frustrations, and possibilities.

We had to think differently about the challenge that was given to us. Innovating the development experience for our company's leaders was only part of the story. Innovating our own processes would be key to our success.

This issue of *TD at Work* gives an example of how you might use design thinking in your learning and development role. Whether you're a performance consultant, instructional designer, trainer, or L&D leader, there's something here for you. The following sections will show how we connected design thinking with each of the ADDIE steps, along with elements from human performance improvement.

DESIGN THINKING IS A HUMAN-CENTERED APPROACH TO INNOVATION OR PROBLEM SOLVING THAT INSTILLS DEEP EMPATHY.

HOW DESIGN THINKING CHANGED ANALYSIS

As we began our project, here's what we knew:

- The organization was changing rapidly; its CEO of 19 years was retiring, and another senior executive was moving into the role.
- We had to develop leaders for a volatile, uncertain, complex, and ambiguous world.
- Traditional leadership training was falling short.
- Something had to change—but what?

When we created the project plan, we couldn't know what this project would reveal. We knew that the human performance model was a

WHEN ADDIE MEETS EMPATHY

As ADDIE practitioners, we conduct interviews, document organizational and individual performance results, and identify measures and skill and knowledge requirements to determine the level of instruction needed.

We need to do this; we should do this. Yet, as we do, we create distance between our work and the actual performer in the role. Empathy closes that distance.

According to Connie Henson and Pieter Rossouw, in their book *Brainwise Leadership*, there are three components of empathy:

- the ability to feel what others feel
- the ability to understand others' mental states
- the motivation to help others by sharing or understanding their emotions.

As design thinkers, you know you've developed empathy for your stakeholders when your own ideas take a back seat to the expressed frustrations and unmet needs of your primary audience. This was true for us, and one of the first times we felt this pull was during a focus group session.

We assembled a small group of frontline managers who were relatively new to their roles. As we made our way through a series of questions, they became reflective—and more thoughtful. Their responses became personal as they shared the challenges and frustrations of being leaders.

Some of the things we heard were "If I have to choose between leading people and meeting project deliverables, I'll meet the project deliverables." "I was just thrown into this role. I haven't received any training for it. If I want training, I have to figure it out."

In the group was a bright and talented woman we had known for several years, a product manager, leading a team from the company's largest business units. As the conversation unfolded, she put her hand on Deb's wrist and said, working to hold her emotions in check, "I know there is something important about leading. I just don't know what it is."

For the members of the team in the room that day—and for others with whom we shared this and other stories—there was no turning back. We were compelled to solve this problem, help these leaders, and in doing so, help our company. We had experienced empathy.

given, as was ADDIE. We had sound and proven processes, and we had no reason to embark on this adventure with anything but our trusted toolkit. It was a safe and logical assumption that training would be part of this solution.

But we soon discovered that a laser focus on the performer and the desired performance in a rapidly changing organization was insufficient. The expectation to globalize our leadership development changed the game—even more than our charge to innovate did.

IT TAKES DEEP EMPATHY TO UNDERSTAND WHAT PEOPLE WANT AND NEED.

Framing the Problem

As the project unfolded, what we thought was going to be an innovative curriculum became more about the experience of being a leader for the company.

With this expanded scope, the team took a step back from our standard starting point—business analysis (although we did come back to it later). Instead, we leveraged a design thinking approach called *framing an opportunity* or *a central question*—that is, framing the problem—about leaders, leading, and leadership for the company: *What are the elements of a leadership infrastructure in a globally integrated enterprise?* This compelling question drove our curiosity and our research plan.

Design thinkers practice divergent thinking to get a 360 perspective. That meant going beyond standard business and performance analysis practices of determining business goals, relating them to the performance of company leaders, and determining the gap between the desired and actual performance state.

We researched the entire ecosystem of leading and leadership—beyond the performers and their environments. This required us to look outside the organization to identify broader economic, cultural, and leadership trends. For example, we read the DDI Global Leadership Forecast and combed through websites and periodicals, such as the *Harvard Business Review* and ATD blogs and publications. We accessed data from our company's internal cultural survey to better understand what was happening inside our organization. We attended workshops, webinars, and seminars. We read books—lots of them.

FIRST UP: PROBLEM FRAMING

We were handed a grand challenge: Determine the leadership capabilities for a 21st-century leader that were unique to our organization. It was a bigger and more "wicked" problem than we had faced in our years as performance consultants. And we knew that our senior executive had high expectations for what we'd discover.

The question was, where should we begin?

Human-centered design demands that we truly and deeply understand the problem and its effect on others. It requires us to give up our own notions of the right answer or best solution and immerse ourselves in exploring the problem from multiple points of view and perspectives. That takes time. And it's not always easy, especially if you're new to this way of approaching problems.

But it is possible. It takes a willingness to continually revisit and revise the problem/opportunity statement as you learn more. This is key to innovating in a way that delivers long-term value to the people you hope to serve.

The way you frame your problem determines how you think about it. If you frame your problem too narrowly, your solutions will be constrained and predictable. If you frame your problem too broadly, your solutions could be vague and of little value.

The problem statement becomes your North Star. It will guide everything you do. All your activities should be to advance your understanding about the problem.

Ethnographic Research

Our next step was to shift our focus internally and leverage the design thinking method of ethnographic research. Ethnography comes from the field of anthropology, where researchers study people in their own environments to understand how they live and work–on their terms, not ours. This observational method of research helps design thinkers understand the context in which customers–or in our case, leaders–operate, and it provides insight into what they may need or how they might use a product or service. People often are not able to express what they need, unless it's in terms of what they already have. Ethnographic research helps design thinkers understand the challenges people experience and identify otherwise elusive ideas for making life better.

As we observed leaders interacting around the organization–in meetings, in open spaces, around our building–we also talked with them. We held focus groups with new and emerging leaders at multiple levels in locations around the world. We also interviewed a dozen global senior leaders one-on-one. We wanted to understand how people viewed leadership, as well as gain their perspective on what leadership attributes and characteristics they believed to be important. This helped our team members think beyond our national borders. We became fluent in the expectations of leaders from different countries and cultures.

We talked with non-leader employees and HR staff as well to form a picture of the leadership capabilities our organization needed as it moved from a multinational company to a globally integrated enterprise. (This alone drove multiple initiatives–for example, an emphasis on building cross-cultural capabilities in all employees, starting with leaders.) We gathered information up and down the organizational chart, in terms of both the "as-is" and the "could-be."

From that broad perspective, we sharpened our focus to look closely at the people in leadership roles. Here we relied heavily on our HPI toolkit, but we enhanced it with some design thinking methods.

Stakeholder Mapping

Design thinking teaches us to empathize with our stakeholders. We used a simple and straightforward design thinking method called stakeholder mapping to help us see our target audience not as a large groups of leaders, but as individuals facing challenges in our rapidly changing company.

Stakeholder mapping is an essential tool for design thinkers. Done correctly, your stakeholders become real as you get closer and closer to them. The technique clarifies the relationships and interactions among people and groups and also shines light on challenges.

Stakeholder mapping was our gateway to empathy. We discovered how difficult it really was for leaders to navigate our complex organization.

From Complexity to Clarity

About five months into our project, we learned that our long-term CEO would be retiring at approximately the same time as our expected launch of the new development program. The new CEO, coming from within the company, would be assuming leadership two months later. We decided to delay our schedule to see what the new leader might say about leaders and leading.

As a kickoff to our new fiscal year, the new CEO began his tenure with a global leadership meeting for the top 150 leaders. His key message was that leaders are better when they are humble, display empathy, and inspire trust. That led us to use those key behaviors as a basis for our program and inspired the leadership mindset that became the North Star for both participants and the project team: *Leaders believe that everyone has enormous potential and that by how we work together, we unlock the human promise of all of us.*

This meeting also provided information around the company's strategic direction and goals. Now, we had the first element of our business analysis, which drove our analysis of what the organization's leaders needed to know and do. We consolidated and captured our learnings in strategic and role-level impact maps to begin connecting performance to business goals.

Performance and Cause Analysis

As our analysis continued, we captured various corporate initiatives that were affecting leaders—for example, cross-cultural initiatives associated with moving to a globally integrated enterprise. Related to this was an expat project, as well as a project to increase cross-organizational collaboration.

And of course we were seeing the Millennial population grow, resulting in several initiatives to rethink standard talent management practices such as onboarding. With the organization driving and absorbing extensive change, the company also had commissioned a survey on the company's culture.

Meanwhile, L&D team members in the United States, Mexico, France, Germany, China, and Malaysia engaged in a training needs assessment. As the pieces began to fall into place, we began to understand the knowledge, skills, and motives required for a leader to be effective. We captured everything in impact maps—one for emerging leaders, one for frontline leaders, and one high-level summary, useful during meetings.

WE CONSOLIDATED AND CAPTURED OUR LEARNINGS IN STRATEGIC AND ROLE-LEVEL IMPACT MAPS TO BEGIN TO CONNECT PERFORMANCE TO BUSINESS GOALS.

When the role-level impact map for frontline leaders had reached an acceptable point of completion, we were stunned. Taped together length-wise using 11 x 17-ledger-size paper, the map was more than six feet long. At a glance, it presented a picture of the complexity and challenges that came with being a frontline leader for the company.

CREATING A STAKEHOLDER MAP

Stakeholder mapping comes from the world of project management, but it's an essential tool for design thinkers. One of the most valuable things about stakeholder maps is that they force you to think about the individuals involved. It's a visual illustration of the relationships among all of the individuals who have a stake in your initiative.

When creating your stakeholder map, ask:

- Who are all the people affected by this problem or opportunity? (Remember to include your sponsor.)
- What's at stake for each of them?
- What's the relationship between these groups of people?

Follow these steps from the LUMA Institute to create a stakeholder map:

- Dig down at least a level or two for each stakeholder group.
- Draw a picture to represent each stakeholder group. (Stick figures are fine!)
- Label each stakeholder group.
- Write a speech bubble to summarize each group's mindset. (You can use comments from interviews and focus groups.)
- Draw lines with arrows connecting the stakeholders.
- Write a label on the line describing their relationship.
- Circle and label related groupings.

Making Sense of the Data With Frameworks

Design thinkers are masters of multiple types of frameworks. Frameworks help you make sense of all the data and research you've collected, and they help you see patterns and themes in the research.

An impact map is a framework for organizing information and deriving meaning. Another popular framework is a SWOT (strengths, weaknesses, opportunities, and threats) analysis.

Our project team's favorite was a framework we called the have/want matrix. (See the graphic below.) Using sticky notes, we plotted the research to discover:

- what leaders didn't have but wanted
- what leaders had but didn't want
- what leaders didn't have and didn't want
- what leaders had and wanted.

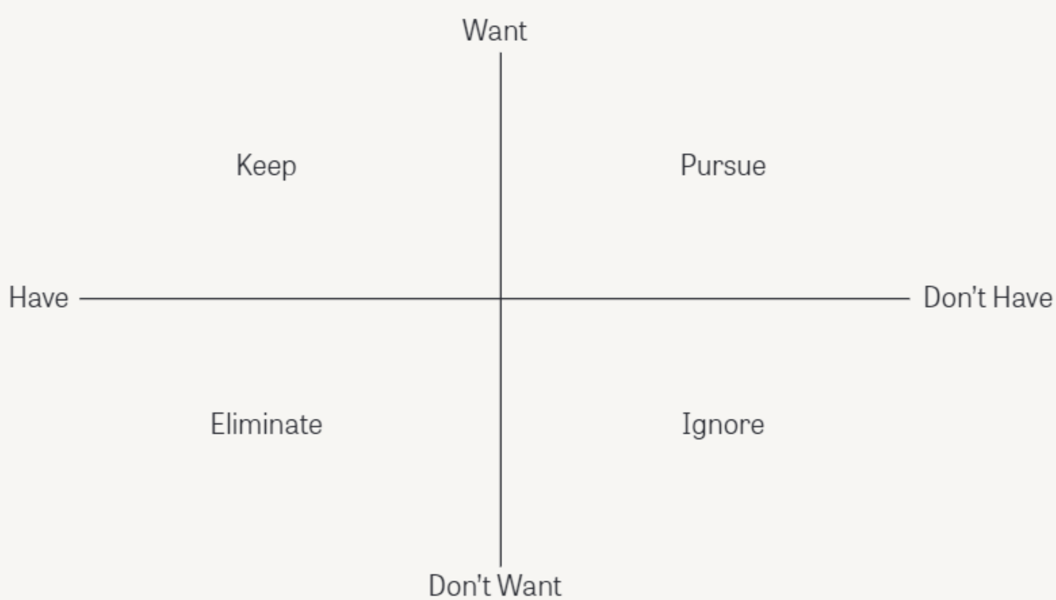
Insights and opportunities became crystal clear as we processed the information from this analysis.

Design Criteria and What Wows

We expressed these insights as "wows"—a design thinking idea we borrowed from Jeanne Liedtka and Tim Ogilvie's book *Designing for Growth*. "What Wows?" is the third of four phases in Liedtka and Ogilvie's design thinking process (What Is? What If? What Wows? and What Works?) The output of the "What If?" phase is a set of design criteria to be used to evaluate concepts. We used the title "What Wows" to express the criteria for the leadership development prototype.

The wows also represented the design promises the project team was making to participants. This was immensely powerful. With an initiative this large and complex, it was easy at times to get discouraged and overwhelmed. The wows became our guides when things got tough.

HAVE/WANT MATRIX



They reminded us of the empathy we developed and motivated us to solve problems for each leader we met and for the organization as a whole.

These were some of the wows for our leadership development experience project. Participants in the development program would:

- experience a variety of learning activities, including formal, informal, and experiential application activities
- be provided time to learn, reflect, and apply what they're learning, without the pressure of too many competing priorities
- uncover their strengths and weaknesses by completing a pre- and post-assessment to help determine their readiness and developmental focus areas
- experience a rich, relevant, and meaningful development journey as part of a cohort group that will encourage and support learning from each other through shared experiences and informal coaching
- feel they are part of the leadership community; believe they are ready for leadership
- understand what is expected of leaders and what it means to be a leader
- have a mentor
- have regular and specific development discussions with their direct leader or supervisor in order to be guided through the process and apply their learning to job-specific areas
- believe they have a specific purpose that is critical to the organization's success.

Now that we had these wows and our strategic and role impact maps, the way forward was clear.

HOW DESIGN THINKING SHAPED DESIGN AND DEVELOPMENT

Our first step in the instructional design and development phases was to create a high-level curriculum map. This was a team effort that included colleagues from Europe, Asia, and Mexico who were either in the room or on the phone as we began to convert the information from the impact map into a macro curriculum map. It wasn't long before we had the sequence of topics and courses, prerequisites, and delivery methods laid out.

Solution Selection

With our instructional design team engaged on the custom elements of the curriculum, we set out to identify external resources and partners for additional courses and the tech-enabled components of the blended learning solution we intended to offer our leaders.

One element was an invitation-only group on the company's social media platform that we named Leader Central. Once again, our team came together physically and virtually to identify concepts from the research that would find a home at Leader Central. These included a project opportunity bank, a way to "pay it forward," and a way to experience peer-to-peer learning.

Co-Creation

Even though we thought we were spot-on with the topics, we went back to our focus group participants and invited them to co-create with us.

Co-creation is another design thinking technique we learned from *Designing for Growth*. It meant putting something unfinished in front of a stakeholder and letting that person shape it. It was strictly a no-selling zone; we had to hand over the idea to a group of stakeholders and step back and let them run with it.

Co-creation was both fun and frightening. As a corporate university (and ATD BEST Award recipient), we were accustomed to striving for perfection. We had embraced a level of rigor that was contrary to design thinking's mantra to fail early and fail fast. But we were rewarded because we learned from our stakeholders. They helped us create a better solution.

Here's how we did it:

- We created a physical version of Leader Central in a meeting room where we posted on the walls the different sections, topics, and links we envisioned for the site.

- After a brief orientation to the room and an explanation of what we wanted, our stakeholders spent time going from spot to spot (armed with sticky notes).
- Stakeholders talked among themselves, shared ideas, collaborated, and made suggestions.
- We called time and asked stakeholders to share their thinking with us.

One important piece of feedback from this session was that our internal social media site wasn't intuitive—even to Gen X and Gen Y employees. This information prompted us to create several short documents on how to use each main section of Leader Central.

Without the co-creation feedback, we would have moved ahead with two assumptions:

- Employees had had enough time with the platform to be comfortable with it.
- The younger generations—primarily Millennials—would gravitate to it and use it.

Because of the co-creation event, we made changes to Leader Central and felt great doing it because we knew we were creating something that participants valued. The bonus was that we had a group of people who already bought into the idea before we officially launched the site.

CO-CREATION MEANS PUTTING SOMETHING UNFINISHED IN FRONT OF A STAKEHOLDER AND LETTING THAT PERSON SHAPE IT.

We used a similar approach to testing another part of the blended solution: Harvard ManageMentor, from Harvard Business Publishing. The company was already using the online resource in a limited fashion to support its high-potential development program. We wondered if frontline leaders around the world would use it to complement the in-class components of the blended learning solution.

To test the idea, we invited the Harvard Business Publishing sales executive to meet with stakeholders, provide a demo, and answer questions. Then we set people up with a test account and asked them to use it.

We stayed in touch with these users, made note of their experiences, and within weeks decided to purchase additional licenses for global leadership development participants, their leaders, and senior leaders. While this wasn't exactly a co-creation activity, we borrowed from the concept to get feedback and build buy-in early. It was worth the time and effort.

Pilot or Prototype?

Most of what we did during design and development was true to ADDIE—with one exception. We did not run a pilot of our global leadership development experience. Using design thinking language and methods, the initial offering of the curriculum was promoted as a "market-ready prototype." What's the difference?

As Tom Kelley, in *The Art of Innovation*, writes, "Prototyping is both a step in the innovation process and a philosophy about moving continuously forward, even when some variables are still undefined." By our definition, a pilot was 90 to 95 percent sound. Market-ready prototypes are 75 percent sound.

As a high-performing corporate university, delivering anything less than 95 percent was jarring for many. Internal team members who had not participated in a design thinking effort struggled with delivering a prototype. Potential participants, their leaders, and HR business partners also had to adjust expectations about the development experience.

Assumption Testing

With a market-ready prototype, we leveraged assumption testing, something we also learned about in *Designing for Growth*. (See the job aid, Assumption Testing, for more information.) Assumption testing is based on the idea that when a project fails—or doesn't meet expectations—it's usually because the reality isn't what we assumed it would be.

Assumption testing, according to Liedtka and Ogilvie, "is a tool for surfacing the key assumptions underlying the attractiveness of a new business concept and using data to assess the likelihood that these assumptions are true." As excited as we were about the development experience we were creating, we took a step back and identified our assumptions, then decided how and when we would test them.

These were some of the questions we would test during the prototype:

- Does the platform (formal, informal, self-directed, OTJ application) work? Does it transcend cultures and generations?
- Does the desired mindset shift occur through the experience?
- Given an orientation, would participants and their leaders have enough information to engage?
- Will HR business partners embrace their role as coaches to leaders and participants?
- Would executive visibility and participation enhance the development of frontline leaders?
- Will this learning process be a great experience?
- Will regional cohort learner groups significantly enhance the experience and build capable leaders faster?
- Will providing "experience coordinators" enhance the experience for participants?
- If people take control of their learning destiny, will they think and feel differently?

HOW DESIGN THINKING SHAPED IMPLEMENTATION

To say there were times when the team was *not* overwhelmed would be, well, a lie. One of those times was when we had the curriculum map completed and the timing and logistics identified.

Excited, we began moving forward by asking our internal project manager and our primary external partner to put together a master project plan. And we expanded the responsibilities of the project manager to include managing all the projects associated with the leadership development experience. That was the easy part of implementation.

Moments of Terror

The magnitude of what we were about to do hit us as a "moment of terror"—a naturally occurring phenomenon that is part of the design thinking process. Moments of terror are easily recognized by an individual's or collective team's deer-in-the-headlights expression—or any other verbal or nonverbal expression of fear and self-doubt. They can happen anytime, but often are prompted by these moments:

- Drowning in data: After we have the research collected and before we know what it all means.
- After the brainstorming: Some 500 sticky notes … but is there anything new here?
- The debut: Ready to implement . . . What?!

How can you survive a moment of terror?

- Breathe.
- Have back-up plans.
- Believe in what you're doing and stay strong.
- Don't let a few rejections knock you off course.

The Market-Ready Prototype

The leadership development experience was 13 months long; the curriculum was divided into seven "blocks" where we brought people together for up to three days (excluding travel). Overall, the time was divided into the following:

- Eleven percent of the learning was done in classroom.
- Three courses were delivered via virtual classroom technology.
- The balance of the learning was self-directed.

We ran the courses in three regions of the world nearly simultaneously: the Americas, Europe, and Asia Pacific.

Our original team of six had to keep driving the design and development of the curriculum components. They also had to work closely with HR business partners around the world to identify participants for our initial launch.

Prototype Participants

Because the company had been going through change over several years, many people had been moved into frontline leadership roles with no preparation or development to speak of. We had far more candidates for the initial prototype than we could accommodate.

But this wasn't a typical pilot of a new program where participants could expect a nearly flawless experience. We told them up front, before they even signed up, that they would be in a prototype, not a pilot. We also told them that the experience would have flaws that we needed them to help us identify so that we could improve the program. We had communicated specific criteria describing the ideal participant; one criterion was willingness to be part of a prototype.

We also had to address the concept of "failure," first with ourselves and then with the participants and their leaders, to manage everyone's expectations. The organization hadn't really embraced prototyping outside perhaps the product development arena. Thus, we had to use the appropriate language and help participants and others to understand why failure is a good thing. We had to embrace the design thinking mantra of "fail often and fail fast."

And there was one aspect of design thinking whose significance we underestimated on the part of our participants and their leaders: the presence of ambiguity. Ambiguity is part and parcel of design thinking. Tom Kelley and David Kelley's words from *Creative Confidence* remind us that "it takes courage to leave the land of certain outcomes and the comfort of what we know to try a new approach."

NO WORDS!

Three days before we were to have an update with our sponsor, he walked into our staff area. As he passed me, he looked me in the eye, pointed his finger, and said emphatically, "No words! I don't want a lot of words from you at our meeting." He kept walking as I froze, wondering how to take words out of my update.

Fortunately, we had attended a workshop at the Illinois Institute of Design led by Kim Erwin, author of *Communicating the New*, where we learned techniques and ideas for communicating complex information visually. As luck would have it, our project sponsor also had attended.

We also saw the need to transfer our knowledge and experience in a way that would generate empathy on the part of our sponsor. It was key to breaking through assumptions and preconceived notions of what leadership development should look like.

During our monthly check-ins with the project sponsor, we shared information using large posters and graphics. The posters reflected the same graphic style of the program, reinforcing the messages. As we stood with our sponsor in front of these visual aids, punctuated with headlines and quotes, we retold the stories we had heard. This approach worked beautifully, likely because we got out of the way and let visuals and stories take center stage.

Another communication challenge we faced was how to help senior leaders and potential participants and their leaders understand the concept of blended solutions, especially in areas of the world that still relied on more traditional classroom methods.

We dedicated an entire wall of our project room to our ever-evolving metaphor for the development experience—a theme park. Using flip chart paper, sticky notes, and downloadable images, we created a complete visual that represented how participants would engage in the leadership development experience, much like how they would visit a theme park and engage in special attractions. As it took shape, we brought in some of the original focus group participants and asked them if we were getting it. We were, and they were too.

It was one thing to ask the project team to endure the ambiguity, uncertainty, and even insecurity regarding how this would all come together and the result we might get. However, we didn't realize that our participants and leaders also would feel the discomfort of ambiguity. We were grateful that despite the uncertainty our participants felt, we saw it fade away as the learning experience unfolded.

Expanding the Project Team

With the identification of participants well under way, the project team leader had to confront a major issue—a serious lack of resources for implementation. Most of the original team members were wearing more than one hat. Performance consultants were partnering with HR to identify participants, overseeing individual instructional designers and custom projects, and working with external partners to identify courses we would purchase. A few performance consultants also took on workshop facilitation roles. And while that was happening, the project leader was managing and leading the team and was responsible for all communication associated with the project.

We leveraged the expertise of our primary external partner to support the communication strategy and much of the writing. The project team leader also worked closely with our external partner to create the feedback and measurement strategies.

WE WERE GRATEFUL THAT DESPITE THE UNCERTAINTY OUR PARTICIPANTS FELT, WE SAW IT FADE AWAY AS THE LEARNING EXPERIENCE UNFOLDED.

A Few Good (User-Centered) Facilitators

Like many corporate learning functions, our solution used a combination of resources to deliver our courses. For purchased courses, we contracted with vendors' facilitators. For custom-designed courses, we used our own facilitators, often paired with subject matter experts.

Within the leadership development curriculum, there was a set of core leadership skill workshops that we strongly believed required internal company resources. Some of the project team members had facilitation skills and experience, but they were stretched thin and could only take on one or two facilitation assignments. So we invested in two train-the-trainer sessions to prepare additional facilitators from other company learning programs.

Red Thread of the User Experience

Beyond train-the-trainer sessions, we put extra time and effort into preparing everyone who would facilitate learning. This included internal and external facilitators.

We identified the "red thread"—themes that ran through the entire development experience. More than themes, empathy, humility, and trust became the criteria that everything about the experience had to meet.

Because of the emphasis on empathy, humility, and trust, everyone working on the program needed to understand and embrace these behaviors. We also asked all facilitators to weave these key behaviors and messages into their content.

To support this effort, one of our instructional designers created a "red thread" strategy document that our performance consultants reviewed with all facilitators. This strategy document was a complete download of the information we had gathered that shaped our decisions about the leadership development experience.

We included this up-front alignment work in our contracts with facilitators. We wanted our extended team to be user centered as they interacted with participants, and we were willing to go the extra mile to provide them with the background and perspective to ensure it.

When we launched the first set of courses, every facilitator knew what had come before and what was coming after. They wove into their workshops the key leadership messages and behaviors we were developing. They were interlocking pieces of the experience.

But we were still missing a critical resource—a role that would say loud and clear that we were user centered and that the experience of our stakeholders was what mattered.

Experience Coordinators

The original research that started this project provided clues to what was needed to address the unmet needs and frustrations of potential participants and their leaders. We heard time and again that our learning and HR technology platforms weren't being leveraged to the extent we needed or hoped.

In fact, it turned out that our relatively new learning management system (LMS) was an obstacle to employees and leaders who were trying to find the development opportunities our global corporate university had available. It was not our intent to recommend that we abandon our new LMS, but if we were to stay true to the opportunities design thinking reveals, we couldn't ignore this feedback.

That's when the role of the "experience coordinator" was born. We asked three members of our global learning team to assume this responsibility. These employees were experienced in learning event logistics and communication, as well as with such services as arranging meals and snacks, reserving hotel rooms, and providing transportation to and from venues. Their primary job was to provide "concierge" services to participants and other stakeholders to augment the technology-enabled registration and record keeping.

We also plugged these coordinators into the communication strategy, which included consistent messaging before and after each "block" of training. It didn't take long before both participants and their leaders recognized the experience coordinators as the primary point of contact. With their empathic, human touch, the experience coordinators became the eyes and ears for other team members, ensuring that we were listening and responding to issues and opportunities we might not have been aware of otherwise.

BECAUSE OF THE EMPHASIS ON EMPATHY, HUMILITY, AND TRUST, EVERYONE WORKING ON THE PROGRAM NEEDED TO UNDERSTAND AND EMBRACE THESE BEHAVIORS.

HOW DESIGN THINKING SHAPED EVALUATION

The potential for a clash of priorities was clear as we developed our measurement and evaluation strategy.

Design thinking doesn't seek or need empirical evidence of success. But this is contrary to the learning and development profession's rigor around measurement and evaluation. It wasn't acceptable to members of the project team that we abandon our professional standards. We knew design thinking offered ways to test the prototype and identify improvements.

As we dug into the dilemma, we realized it wasn't an either/or, but a both/and challenge.

Feedback and Evaluation Strategy

Our plan included requiring all of the participants to complete a predevelopment experience assessment for a baseline. We reinforced the value of this requirement in the kickoff and orientation sessions that we delivered globally using our virtual classroom technology.

We identified multiple ways to gather informal feedback, including ongoing conversations with facilitators and the experience coordinators.

To gather data for Kirkpatrick Levels 1 and 2 (reaction and learning), we deployed a survey at the conclusion of each learning block to gauge learner satisfaction with course content, delivery, value, and relevance. To track how well the highest-level objectives of the experience were being accomplished, we always included a question regarding how participants' beliefs about leadership were evolving. We were not disappointed as we gathered participants' thoughts and feelings about how they were changing.

We also encouraged participants and their leaders to meet shortly after the conclusion of each block to share the experience, gain an understanding of what each participant learned, and identify opportunities for on-the-job application. To gain insight into what participants were actually transferring to the job and what results they were experiencing, we met virtually with their leaders at the midpoint of the development experience.

We posed several questions to prompt leaders to share stories of their interactions with participants, where they were seeing growth and change, and what impact the program was having. In some cases, leaders embraced this opportunity to walk the journey with their participants.

In addition, we collected data from the Leader Central social network platform—for example, tracking the number of hits and "likes."

Iterating the Prototype

Although we had the survey responses, design thinkers seek additional information. Because we were transparent with participants about needing their feedback, we added an hour to the end of every learning block to ask them in person about the experience. Using the survey data as our starting point, we probed for more, resulting in immediate enhancements to components of the experience.

For example, a master curriculum map on Leader Central included information about dates, locations, and content. We thought it was awesome, but our participants thought it was confusing and frustrating. This feedback did not come up in the survey data, but it did come up in the group discussion. Before participants returned for the next learning block, we had created three separate curriculum maps, one for each region, and posted them on Leader Central. As we kicked off the next block, we showed them the new maps and asked if we had solved the problem. We had.

We also learned during our meetings with participants' leaders that some were struggling to identify on-the-job application activities. This form of development was not widely understood and not used in all cultures. We produced a half-page document called "What's Next?" in which we suggested several ways leaders and participants could apply what they had just learned. We shared this at the end of each learning block and made it available on Leader Central.

TO GAIN INSIGHT INTO WHAT PARTICIPANTS WERE ACTUALLY TRANSFERRING TO THE JOB AND WHAT RESULTS THEY WERE EXPERIENCING, WE MET VIRTUALLY WITH THEIR LEADERS AT THE MIDPOINT OF THE DEVELOPMENT EXPERIENCE.

Back to Analysis

Over the first six months of the prototype, we received an enormous amount of feedback from participants, their leaders, HR business partners, facilitators, and the project team. The feedback was diverse—covering cultural nuances, content, what and how we were communicating, what participants were gaining from the experience and to what they attributed the change. It was a mountain of information to process. So we went back to design thinking analysis frameworks.

We once again used the have/want matrix. Taking *every* comment that participants and leaders made in surveys and elsewhere, the team plotted the feedback in the matrix. It revealed:

- what was working—the elements of the experience that stakeholders wanted and were in place
- activities they didn't want that we were delivering, giving us the opportunity to eliminate activities and redeploy resources
- opportunities to add or enhance elements of the experience with feedback on what they wanted but weren't getting
- a few pieces of feedback that fell into the "don't have," "don't want" quadrant.

We also sorted data using the rose/bud/thorn method. This method simply sorts data by the "roses, "which are the positive, good ideas; the "buds," or the ideas with potential; and the "thorns," the barriers and obstacles to eliminate or minimize.

We used both methods because we wanted to sort the data a couple of different ways to make sure we were seeing the opportunities for immediate enhancements and other improvements to make once the prototype was completed.

Graduation Stories

At the conclusion of the development experience, we planned a celebratory graduation event. So many employees and leaders had dedicated themselves to this leadership development prototype, and so much had been learned and gained. Nothing but a party would do.

This event was also the "final exam" for our participants. We were looking for impact on their lives. Several weeks prior to the graduation event, we sent participants the instructions for their final exam. We called it "My Leadership Story." These were the guidelines:

- Reflect on everything that has contributed to the leader you've become, including past experiences, challenges, your current role as a leader, the development experience, journal entries, and readings.
- Synthesize your learnings to determine their key insights.
- Use your insights to create a leadership vision–"Who am I as a leader?"
- Create your leadership story as a means of communicating the vision.
- Deliver your leadership story in small groups at graduation.

The power and impact of the personal transformation the participants had experienced came through in their personal stories. They spoke of complete shifts in thinking about what it meant to be a leader. Many made the transition from "boss" to "leader" by recognizing the impact that leading with empathy, humility, and trust could have.

Others told stories of life changes–not just a different orientation and attitude toward leading. One participant's leader said she was a different person after the learning experience. This participant herself told the story of how members of her team barely spoke to her at first. After she had been in the program, she began interacting with colleagues differently, and relationships blossomed.

STORYTELLING MATTERS

Since the beginning of time, stories have been essential to human existence. Stories shape and sustain culture, and they shape each of us with their ability to influence and captivate. Stories transcend time as they are handed down from generation to generation. They capture our human experience; they connect us to each other.

It seems we've always known this. And if there was any doubt, neuroscientists have discovered that our brains are actually wired to remember stories more readily than facts. For all these reasons, storytelling is a powerful design thinking tool. Stories pave the way for empathy.

In the learning and development profession, we hope to persuade, influence, and inspire. We make persuasive arguments to our clients about the value of a learning initiative. We try to inspire our learners through the content in our courses. We often do this through lists, charts, data, facts, and figures. But facts—lonely, cold, and isolated—need the context of a story. Stories help us understand the meaning behind the facts.

We used storytelling to communicate with our sponsor the difficulties first-time leaders were experiencing. We retold leadership stories with program participants. We asked leaders to join the workshops and tell the stories of their own leadership journeys. And we had participants tell their stories as part of the graduation experience.

The next time you want to influence, inspire, or persuade, try incorporating storytelling, and watch your audience's engagement rise.

Other participants told stories that captured the transition from high technical managerial skills to leadership skills. All talked about changes in their relationships with members of their teams. Senior leaders who listened to the stories acknowledged that they could improve their own effectiveness with empathy, humility, and trust.

We had 80 global participants—some of whom were skeptical, and some even a bit offended because of our focus on empathy, humility, and trust as the key leader behaviors. The graduation storytelling proved that the experience had been life changing for the participants as well as important for their direct reports and leaders.

THE POWER AND IMPACT OF THE PERSONAL TRANSFORMATION THE PARTICIPANTS HAD EXPERIENCED CAME THROUGH IN THEIR PERSONAL STORIES. THEY SPOKE OF COMPLETE SHIFTS IN THINKING ABOUT WHAT IT MEANT TO BE A LEADER.

LESSONS LEARNED

Our jobs are about people, not widgets. That said, using design thinking methods throughout the HPI and ADDIE process magnified our responsibilities and our contributions. We were engaged and motivated and committed in ways that most members of the project team had never experienced—despite the fact that all of us had many, many years of experience.

These are among the lessons we learned:

- HPI and ADDIE are here to stay, but design thinking enhances the experience and the outcomes.
- Blending design thinking methods with HPI and ADDIE is not for everyone.
- Trying new things takes faith and trust. The fact that the project team had all worked together for a long time made that leap of faith easier and helped the trust emerge sooner.
- Leadership is a personal journey. Formal and informal learning is essential for leaders to learn and grow, and being able to support their transformation is critical.
- Design thinking uncovered our curiosity. Because our initial research was broad and deep and included ethnographic methods, we became highly curious about what it meant to be a first-time leader in our company.
- All failure is not created equal. The process of failing fast and often, learning from those failures, and iterating and improving the product delivers immediate value.
- A group of committed people fired up by empathy can make amazing things happen.

Some of you might be thinking about using our experience to guide your next project. We wholeheartedly say, go for it! But here's what we believe are the must haves:

- A bulletproof leader who will protect you from the incoming fire.
- The right team members. We had a high level of trust because we had worked closely together for a long time. Attempting to use design thinking when team members are new to each other would increase the difficulty.
- A willingness to invest in your own development. Learn about design thinking; practice the methods.
- Internal reputation. We had a good reputation in the organization, and we'd delivered big programs in the past. This bought us some leeway.
- Capability and confidence with using design thinking. The project leader and the key performance consultant had designed, developed, and delivered the organization's design thinking curriculum. And we had several years of experience using it on projects and when coaching other teams. This prior experience helped the team survive the "moments of terror," and it created trust.

- Team members who can tolerate ambiguity, uncertainty, and are open to failing fast so as to learn and iterate. You need at least a few such team members to help the more concrete analytical thinkers hang in there.

HPI AND ADDIE ARE HERE TO STAY, BUT DESIGN THINKING ENHANCES THE EXPERIENCE AND THE OUTCOMES.

CONCLUSION

As learning professionals who care about the capabilities of people and the success of our organizations, we're motivated by the right things: Helping people grow. Helping people become more effective. Helping people discover their purpose and connecting them to the organization. Helping organizations engage and leverage the talent and the potential of their employees.

Design thinking changed the game for all our stakeholders. Participants experienced transformational change as they discovered their leadership voice and purpose. Their direct reports benefited from leaders who would now lead with empathy, humility, and trust. And the project team got a once-in-a-lifetime opportunity to make a difference in a significant way.

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Stanford d.School. Method: Storytelling: http://dschool.stanford.edu/wp-content/themes/dschool/method-cards/storytelling.pdf.

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TIPS FOR USING STORYTELLING

Storytelling helps us persuade and inspire our learners, leaders, and other stakeholders as we connect with them on an emotional level. As the Stanford d.school states, "Stories are a great way to connect people with ideas, at a human level."

These tips will help you frame and deliver your story.

Constructing Your Story

- ❑ Beginning: Good stories begin by setting the stage and explaining the situation—what is happening and who is involved.
- ❑ Middle: The second part of a good story introduces the complication—the challenge that needs to be met or the problem to overcome.
- ❑ End: The end of every good story offers a resolution—a solution to the complication or problem.

Telling Your Story

- ❑ Visuals: Images capture attention. Any visuals you use should make your story stronger.
- ❑ Draw it: Simple ideas or concepts can come to life when drawn. You don't need to be a professional artist to leverage this technique. Simple images with stick figures will do.
- ❑ Create images: When pictures are not available or possible, use words to create visual images for the receiver of your story.

Practicing Your Story

- ❑ Make your practice real. Use the body language and words you would use if you were presenting to your intended audience.
- ❑ Stand up straight. Be confident, comfortable, and authentic to who you are. Consider your body language, facial expressions, posture, and gestures. Use your hands to emphasize your point.
- ❑ Practice your intonation. Raise and lower your voice to make a point; slow and quicken your pace to create tension.
- ❑ Record yourself. Mobile devices make that easy. Become the audience by watching yourself.
- ❑ Practice often. The more you practice, the more confident and comfortable you will be.

Sharing Your Story

- ❑ Before you speak, stop, breathe, and smile.
- ❑ Begin with strength and confidence by knowing exactly what you want to say.
- ❑ If you feel anxious, slow down and take a moment to breathe.

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FRAMING THE PROBLEM

Tips for Problem Framing

Here are some guidelines to help you properly frame your problem or opportunity from a design thinking perspective:

- Frame your problem or opportunity in the form of an open-ended question to foster curiosity. A good starting point is "How might we ... ?"
- Avoid quickly focusing on a solution; this will help the team remain open-minded.
- Use positive language to help the team remain inspired and optimistic.
- Look at the issue from a human perspective to put a face on the problem, which fosters empathy.
- Use the "5 Whys" (the iterative process of determining cause and effect relationships) to move beyond the surface problem and dig to a deeper issue.
- Be willing to reframe the problem statement as you learn more. Rarely, if ever, do design thinkers get the problem statement right from the beginning. The more you are open to reframing the question, the more likely you are to uncover latent needs and generate more viable options.

Problem Statement Examples

Less-than-ideal: How might we help people save money?

Better: How might we help people weather financial ups and downs?

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ASSUMPTION TESTING

Assumption testing is a way to learn about the "fatal flaws" of your solution with a few key stakeholders before moving into a full-scale implementation.

Here's how it works:

- Brainstorm potential assumptions (things you wonder about) related to your solution.
- For each assumption, identify how you might be able to test that assumption (for example, focus group, user test, customer co-creation).
- If you come up with more assumptions than can be tested in a reasonable time period, prioritize the most critical assumptions. Start with those that represent the greatest risk of failure.
- Use the form below to document your assumptions and the best ways to test them.

What is the potential solution? ____

Who are the key stakeholders? ____

What assumptions must be tested?	Best way to test

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