SEPTEMBER 2019

Discovery & Framing

ABOUT THIS GUIDE

Much of a role involves guiding clients to make decisions about their product and priorities. Depending on the type of project you are working on, your experience, and your client's level of expertise, you will employ different methods to learn more about a product or make decisions around it.

All of these methods can be lead by anyone on the team no matter the role or their practice. However, whatever your role, it is good to have an awareness of them and practice them with peers first to gain feedback in how you're facilitating them or through your own observations and watching another facilitate the exercise. All these methods assume that participants will represent multiple disciplines and perspectives, rather than just one. As much as possible, allow the full team to participate. Doing so not only gathers new ideas which need to be heard but generates alignment in mental models and product direction among all team members.

They are set up in the following format:

What is it?

Why do we do it?

When do we typically use this method?

How long does it take?

How do we do it?

METHOD NAME

Service Blueprint

WHAT?

A diagram that communicates complex flow.
This is especially for:

- Multiple interactions spread over time (closing and re-opening an app)
- Many mediums of interaction, controlling physical products, customer service

WHY?

- Get everyone understanding the touchpoints in the experience
- Serves as a map of your service over time
- Ensure experiences follow the same pattern; certain columns can be shared
- Help improve a user's journey by uncovering problematic areas in time

WHEN?

Very early in the product lifecycle or whenever we hear people struggling to express a workflow.

PHASE

Discovery

TIME REQUIRED

(2 - 6 hrs)

METHOD PROCESS

One person asks questions while drawing the blueprint on the whiteboard, the other person answers, then you switch.

You can either use post-its if everyone is hands-on friendly or you draw at the whiteboard.

Step 1: Draw Rows

1. Physical Evidence
2. Customer Actions*
3. Frontstage
4. Backstage - eg. services, databases
5. <Any other points, eg. sensors>

*The Customer Actions row is always directly under the Physical Evidence row. It is the user we are targeting, they are the "hero." If you have more than one persona, break each into a separate line.

Step 2: Walkthrough time, drawing columns

Physical Evidence
What does the user first see? The physical evidence is not the interface they see, it is a monitor or cell phone.

Customer Actions
What action do they do to access the service? What do they do next?

Frontstage
How is the service visibly delivered? When a service is delivered, what is the name of the page that the user sees?

Backstage
What helps makes the service happen? The user does not see or directly interact with this.

Other touchpoints
What needs to happen in order for the back end to receive the information?

Step 3: Circle columns or star boxes that:

- Need more clarity through research and exploration
- Need validation because there's product risk
- Have points which should be fixed or improved
- Have opportunities to measure the quality of the service
- Have opportunities for cost savings or increased profits
- Have moments that are loved by the customer and should not be lost

METHOD NAME

Business Model Canvas

WHAT?
In short, the Business Model Canvas is a one-page business model summary. This version comes from iterating on Alex Osterwalder's Business Model Canvas, Ash Maurya's Lean Canvas, and others.

WHY?
It works as a social contract for the team so everyone is working towards solving the same business problem.

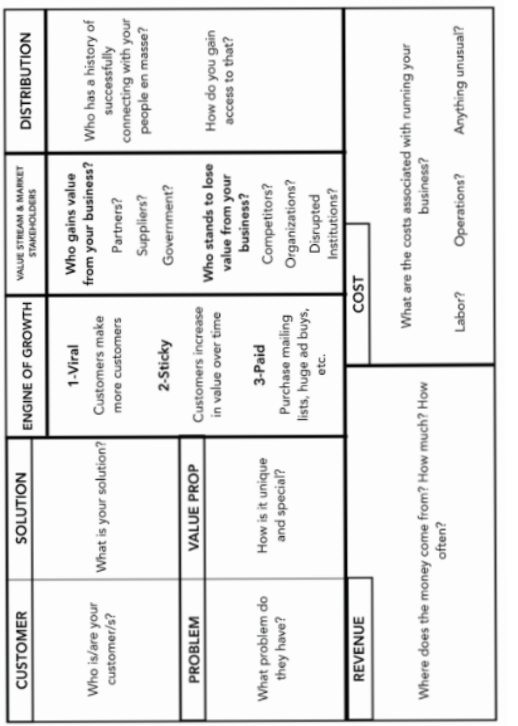
WHEN?
We do this method with client stakeholders early on when they need help thinking through new business models and draw out assumptions or gaps in the model (this could be a startup or an existing company trying to launch a new line of business).

PHASE
Discovery

TIME REQUIRED
(1 - 3 hrs)

METHOD PROCESS

The right side is the "cost" side, the left side is the "revenue" side. This should be an evolving canvas, where new customer segments, channels, etc affect other boxes. Use it to track how customer discovery research insights affect the business model over time.



METHOD NAME

Clothespin Man Facial Expressions

WHAT?
An exercise in drawing facial expressions that helps team members begin to think about the user's reaction to problems and products.

WHY?
This exercise enables the team to contextualize your user and brainstorm what their emotions & pains are.

WHEN?
At the beginning of D&F when the team is still shaping or deepening their understanding of a target user. This is also a useful technique anytime a team or a client is struggling to build empathy for users.

PHASE

Discovery

TIME REQUIRED

(about 20 minutes)

METHOD PROCESS

The facilitator draws their own version of this for the team on a white board. They prompt the group to:

1. Take a sheet of paper.
2. Fold it into 9 sections: 3 folds on the short side, 3 folds on the long side, then open flat.
3. In each section draw a face with eyes.
4. Then draw 3 variations of eyebrows (raised, level, down) down each column and 3 variations of smiles (happy, neutral, sad) across each row, so that raised/happy is in the top-left (gratitude usually) and down/sad is in the bottom-right.
5. Considering each box to be your user in a different state, draw a thought bubble that expresses a feeling.
6. Transfer the best face to a stick figure body and put them in a scene.
7. Discuss and dot-vote.

METHOD NAME

Handshake Exercise

WHAT?
A sample of communication overhead in a project.

WHY?
The purpose of this is to get people to shake hands and see the communication overhead based upon number of people present.

WHEN?
During a new project kickoff to help levelset expectations and team communication norms.

PHASE

Discovery

TIME REQUIRED

(5 minutes)

METHOD PROCESS

1. After everyone has worked together for a little bit, do the handshake exercise: 3 people stand together and the 4th stand aside.
2. Ask the group of 3 to met each other for the first time, each person shaking hands with the other, and count out loud the number of handshakes it takes for everyone to meet each other.
3. Next add the 4th volunteer to the group and ask them to repeat the same exercise.
4. Point out that the number of handshakes has doubled by just adding a single person.
5. Then describe the effect this has on decision making:
   - Decision making happens when people decide to stop talking.
   - People stop talking when they feel understood.
   - Understanding happens between pairs of people.
   - Each pair has to feel understood.
   - The more people there are, the more complicated it becomes to make real decisions.

If you want, you can share the formula:
n(n-1)/2 (6 people=15 handshakes, 10 people=45 handshakes)

METHOD NAME

Assumptions 2x2

WHAT?

This exercise is done to identify assumptions we can act on today, this week, this month, etc. It also helps clients understand that ideas are cheap and we shouldn't hold on to them — important things will resurface if they are truly important.

In this workshop, the team comes together to figure out the largest risks to the product and and quickest ways to test those risks in experiment form.

WHY?

Oftentimes, the standard way to test a product is to build it fully in code and then test the complete product. This is the highest risk way to test, as it requires much time and money. This workshop helps the team brainstorm lower cost ways to test the riskiest assumptions about the product.

WHEN?

Using this activity early and often is key. Risks never really disappear, but the sooner you can recognize and evaluate your team's assumptions and questions, the more quickly you can act to reduce the risk they pose.

PHASE

Discovery

TIME REQUIRED

(2 - 4 hrs)

METHOD PROCESS

Part 1: Assumptions Exercise

1. Split into two groups if necessary.
2. Working individually, write 10 assumptions you have about the service where if you are wrong, our product will fail (5 minutes).
3. Working individually, self edit - take 5 you want to move forward with, 5 you do not want to move forward with.
4. Pass the 5 you don't want to move forward with to your left.
5. Rip up the post-it notes (gasp!).
6. Facilitator sets up 2x2 (so that top right quadrant is the one to move forward with) - risky/less risky and easy to validate/hard to validate.
7. Working individually at the board, plot your 5 on the 2x2 - note to the participants that nothing can be on the line.
8. Working individually at the board, quietly read over how your team placed their notes.
9. Working as a small group, ask questions/discuss placement.
10. Facilitator takes top right quadrant and puts post-its in a random stacked order.
11. Group dot votes.
12. Take highest voted to next exercise.

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PHASE

Discovery

TIME REQUIRED

(2 - 4 hrs)

METHOD PROCESS, CONTINUED

Part 2: Discuss Lean Hypothesis Statement

1. "We believe [TYPE OF USER] has a problem [DOING THING]. We can help them with [OUR SOLUTION]. We'll know we're right if [CHANGE IN METRIC]."
2. Hypothesis = our assumption.
3. Evidence = how we will know?
4. Procedure/Experiment = what will we do to find out?

Part 3: Identify experiments

1. Write down 5 experiments that could help us validate our assumption (5 minutes).
2. Go around in a circle on the whiteboard putting up ideas/explaining, deduplicate as you go.
3. Categorize as Today/This Week/This Month.

METHOD NAME

Assumptions, Questions, & Activities

WHAT?
A collaborative exercise, to dump all of the assumptions and questions that a team has and organize them into actionable steps (activities) that the team can work on together.

WHY?
To collect and categorize all aspects of upcoming workload at the start of a project, as much as possible. It's also necessary to ask a few obvious questions before you reach the insightful ones, because sometimes it takes some experimentation before a different yet viable way of looking at things presents itself.

WHEN?
To challenge assumptions when you are stuck in current thinking paradigms or when you have run out of ideas is particularly effective. Good for rebooting a flagging session and can help the team take a step back from the challenge they're tackling and ask some important questions about the assumptions they all have.

PHASE
Discovery

TIME REQUIRED

(2 - 4 hrs)

METHOD PROCESS

Step 1: Rally everyone in one room.
1. Start by having everyone capture Assumptions on sticky notes and place onto a board or wall.
2. Either they are validated immediately by the team/ industry expert or they are placed into the questions bucket.
3. There is also a risks bucket created, as some assumptions are more risks-oriented.

Step 2: Questions
1. All additional questions are captured by the team and placed into the questions bucket.
2. Questions include anything regarding users, product, or process that we want to answer during D&F.

Step 3: Link questions to Archetypes
1. Questions to be answered through interviews are clustered by users or archetypes.
2. Other questions may be grouped into other categories (such as Integrations or general product questions).

Step 4: Brainstorm Activities
1. The team identifies activities (or To Dos) that will most likely answer the captured questions.
2. Scheduling interviews and creating an interview script, are examples of the first set of activities.
3. Prioritize these activities into 1st, 2nd and 3rd.

Step 5: Create your D&F Status Board
1. Place all activities on a status board and use this to stay organized during the D&F.
2. This physical status board can be the focus of team standups for the 4 weeks of discovery.
3. Team members identify activities to own and put their initials on them.

METHOD NAME

Contextual Inquiry Worksheet

WHAT?
This heuristic framework provides an observation technique used to document contextual inquiries during ethnographic studies. For the purposes of digital product and software practices, AEIOU is helpful for categorizing and interpreting observations gathered during user research field studies and usability testing efforts.

WHY?
To better understand a user's point of view. Most users rely on internalized knowledge to complete tasks. They would not be able to explain to us their process as they are most often not aware of it. We must observe it to understand it.

WHEN?
At anytime during user research field studies and usability testing efforts, but especially important at Kickoff and during Discovery to get a basic understanding of target users in the environment in which your product will be placed.

PHASE

Discovery

TIME REQUIRED

(1 - 2 hrs, per user)

METHOD PROCESS

1. Spend one hour observing users to uncover implicit and explicit needs.
2. Take notes.
3. Take note of the following topics of interest: customers doing the thing; associates interactions; any computer interactions; stress levels; timelines; steps in the process; busy times; where they are in the space.

[A]Activities: what actions and behaviors are taking place?

[E]Environments: what is the overall setting in which the activities are taking place?

[I]Interactions: what are the basic interactions occurring between people, objects and the environment?

[O]Objects: what are all the objects you see?

[U]Users: who are the people you see?

What is this person(s) doing?
Notice what is happening both with the person and the context he/she is functioning within.

How are they doing it?
Pretend you are describing the picture to someone not looking at it.

Why are they doing it this way?
Approach the users and ask questions. Start with a guess. Start to form a story. Then ask them.

METHOD NAME

Stakeholder Map

WHAT?
Stakeholder maps help to visually represent a user and their world while showing connections within a context such as an organization.

WHY?
To fully understand our clients, their company ecosystem and road blocks we may find during the project.

WHEN?
At kickoff or as early as possible at the beginning of a project.

PHASE

Discovery

TIME REQUIRED

(1 - 2 hrs, per user)

METHOD PROCESS

1. Draw most important persona in the center.
2. Give him/her a quote that describes themselves to others (e.g., “I drive traffic, which drives sales”).
3. Give them a question which keeps them up at night (e.g., “How do I get the right people in my store and keep them coming back).
4. Draw all the players in the system in the same manner.
5. Connect them with verbs, lines, and arrows.
6. Follow with Influence Scale exercise.

TIPS

- Draw one for the user’s world
- Draw one for the client’s organization

METHOD NAME

Stakeholder Influence Scale

WHAT?
To generate insights on the importance and influence of each stakeholder.

WHY?
With this information, it becomes possible to develop a specific approach and strategy for the identified stakeholders.

WHEN?
At kickoff or as early as possible at the beginning of a project.

PHASE

Discovery

TIME REQUIRED

(1 - 2 hrs, per user)

METHOD PROCESS

1. Draw 3 columns: Stakeholder, Why, Touchpoint (You can use names or department names).
2. Once everyone has an understanding of stakeholders, split up the names into even stacks and hand them to each person.
3. Draw a horizontal scale: Low influence ←→High influence
4. Have the team map the stakeholders.
5. Take the 5 stakeholders with the most influence and schedule interviews with them to understand their goals and motivations, hear risks from their point of view, and to have them feel heard.

METHOD NAME

What? How? Why?

WHAT?
A simple scaffolding that allows you to move from concrete observations of the happenings of a particular situation to the more abstract potential emotions and motives that are at play in the situation.

WHY?
During observation mode, What? How? Why?, is a tool that can help you drive to deeper levels of observation. This is a particularly powerful technique to leverage when analysing photos that your team has taken into the field, both for synthesis purposes, and to direct your team to future areas of needfinding.

WHEN?
To deepen empathy for users of a product, particularly for team members who are not able to go onsite and visit in person. This exercise enhances the ability to receive and process necessary research information and helps the team understand how the individuals they are building for, experience the world.

PHASE

Discovery

TIME REQUIRED

(1 - 2 hrs, per user)

METHOD PROCESS

Set-up:
Divide a sheet into three sections: "What?", "How?", and "Why?"

Move to understanding:
How is the person you're observing doing what they are doing? Does it require effort? Do they appear rushed? Pained? Does the activity or situation appear to be impacting the user's state of being either postiively or negatively? Again, use as many descriptive phrases as possible here.

Step out on a limb of interpretation:
Why is the person you're observing doing what they're doing, and in the particular way taht they are doing it? This step usually requires that you make informed guesses regarding motivation and emotions. Step out on a limb in order to project meaning into the situation that you have been observing. This step will reveal assumptions that you should test with users, and often uncovers unexpected realizations about a particular situation.

METHOD NAME

Behavioral Archetype

WHAT?
Conveys the “who does what, when they do it, & “why” of your audience. Steeped in user behavior, they focus on a group’s needs, motivations and pain-points, and capture how they think, feel and act in particular situations or scenarios.

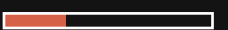
WHY?
Archetypes are aspirational models we are likely to desire and pursue within the product being built. Most importantly, they are introspective and aspirational. They allow for seeing the users as co-directors rather than a passive audience.

WHEN?
Early in Discovery, just before or directly after initial research has been conducted to help align the product team on a high level view of customer behaviour, motivations and pain points. Can also be created or refined at any point in the process if misaligned or different models of users start to be uncovered. Also, Behavioral Archetypes can be used anytime a team is redesigning an existing system.

PHASE

Discovery

TIME REQUIRED



(1 - 2 hrs)

METHOD PROCESS

1. To start, gather the team and supply post-its and Fine Tip black Sharpie pens to all. Using the prompt, “Who uses your product or service?”, have the team write all the various roles or names onto their post-its. One name per post-it.
2. Place all the suggested names onto a wall, then cluster into meaningful groupings and give each group a name.
3. Once the team has agreed on the names of the archetype groups, return to the group with the highest quantity of post-its the team generated. Take 3 minutes and repeat steps 1 and 2 to generate actions or behaviors a person fitting this model might take. Then, working one-by-one in the same way, generate goals, thoughts, feelings, needs, & pain points.
4. Repeat steps 1 through 3 for the top 2 archetype groups.
5. A good optional follow up can be to try to synthesise all the actions and behaviors into a set of universal goals.

Note: Take photos as the team works, making sure to capture other archetypes that were mentioned but were not chosen to move forward with. This exercise also pairs well with Scenario Writing and Experience Principals as follow ons.

METHOD NAME

Scenario Writing

WHAT?
Scenarios are fictitious stories of the users or personas we are designing for. They involve a user performing certain actions or simulations to accomplish a goal. It also involves using a product, service or prototype to accomplish certain goals in their day-to-day activities or otherwise. Scenario stories also help product team members align on user objectives.

WHY?
Scenarios are a very powerful way of telling user stories in a descriptive or illustrative way that then can provide cues into structuring them in the form of documents.

WHEN?
Scenarios can be used in a discovery phase before low fidelity prototyping, as well as at the usability-testing phase of the design project. It can help with forming the value of a service that a tool will provide as well as figuring how the user will use specific features, when will it be used, how close to the designed features are delivering on user needs, among other questions.

PHASE

Discovery

TIME REQUIRED

(1 - 2 hrs)

METHOD PROCESS

1. Imagine your target user in the environment where they might be performing the workflow.
2. Thinking through their entire workflow, try to list down all the steps that a user would perform using the solution.
3. Use sticky notes or a shared document and write each step of the activity. It is only necessary to capture actions on the general task level. Becoming overly detailed on a feature level in the description of the scenario can ultimately be limiting for interaction design decisions.
4. Write one step per line or note. Do not focus on the interface or design limitations as those can be handled later on. Simply add each task as a new step to the scenario the user is in.
5. Each team member should complete their own scenario. Once everyone has had time to work through theirs, hang them on a wall and do a silent read-through.
6. Discuss and ask questions about individual scenarios where things may be unclear.
7. Once all the scenarios have been discussed, work as a team to create one master scenario, repeating step 4, and talking through it aloud as a group.
8. Once finalized, you have the basic skeleton of the features you'll need to design and build for.

Note: Option to follow up with Design Studio or Generative Interface Creation.

METHOD NAME

Card Sorting

WHAT?

A user research method, focused on learning how they categorize information. It is useful to learn about to inform on information architecture, navigation and grouping on content.

WHY?

The purpose of Card Sorting is to see how uninformed (not in the weeds) users would organize items into logical groupings.

WHEN?

We use this method anytime we need to understand a user's mental model of hierarchy or priority. Teams can also use this method internally when they need a facilitation method which will result in clear prioritization of features or next steps.

PHASE

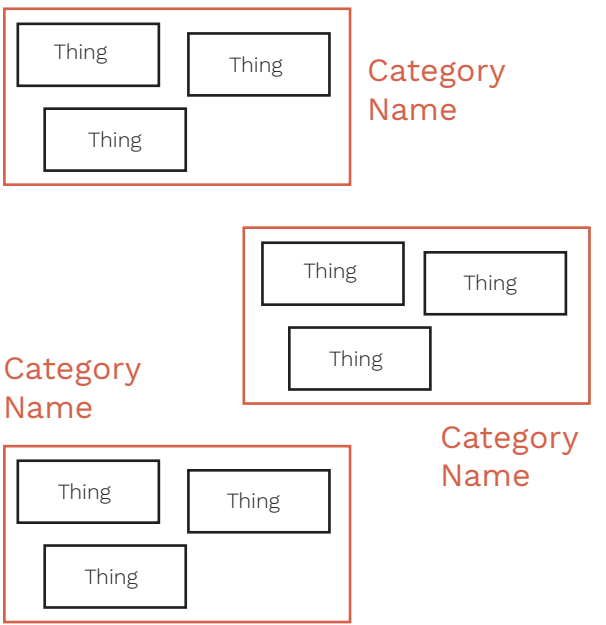
Anytime

TIME REQUIRED

(about 1 hr)

METHOD PROCESS

1. Open Sort: Write a bunch of things on cards.
2. Ask users/facilitators to group them into what they consider to be logical categories.
3. Afterwards, ask users to give each category a name.
4. Alternatively, do a Closed Sort: write a few pre-determined category cards and see where users sort cards (or have trouble sorting cards).



METHOD NAME

Clustering / Affinity Mapping

WHAT?

In our practice, it is used as a step in synthesizing generative and evaluative interviews with users. It is also used when organizing ideas after a brainstorming session (for scripts, product ideas...).

WHY?

To have a fair and reasoned way to sort through, examine and abstract large amounts of shared information within a team.

WHEN?

Anytime a team or group needs identify patterns inside of large amounts of information.

PHASE

Anytime

TIME REQUIRED

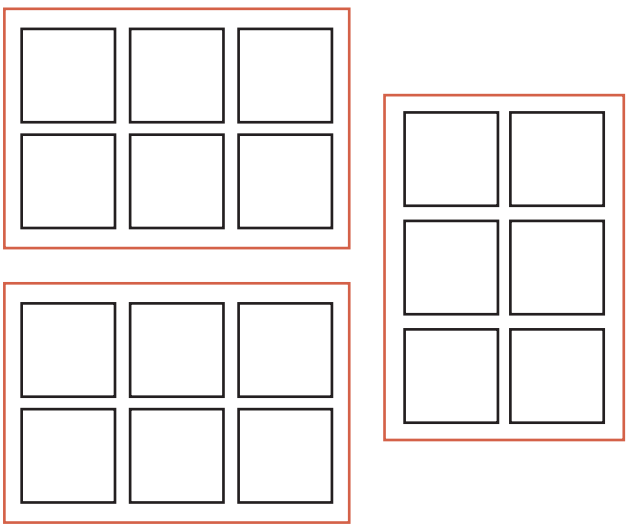
(1 - 4 hrs)

METHOD PROCESS

1. Participants write one idea per post-it, stick them on the wall, and begin grouping. Grouping can be done by topic, theme, or another observed pattern.

2. Often starts as a silent exercise as participants read the notes, and then leads to discussion as logical clusters or topics are identified and negotiated, which leads to alignment.

3. A useful follow-up exercise can be ‘Insights & Actions’.



METHOD NAME

Insights & Actions

WHAT?

In our practices, it is used after research synthesis to collectively discuss patterns as a team and drive follow-up actions for each insight.

WHY?

The quality of understanding user behavior is foundational to a team's effectiveness in making positive change. This method facilitates letting go of individual assumptions and allows a team to deliberately observe patterns in completed research together, and then drives the group toward action in creating a coordinating next step for each insight.

WHEN?

Anytime a team or group needs identify patterns out of a large amount of data or product feedback, and drive toward next steps.

PHASE

Anytime

TIME REQUIRED

(1-2 hrs)

METHOD PROCESS

1. Participants gather in front of the synthesis and complete a silent read-through

2. The facilitator creates a list with two columns. On the left side, the list is labeled, "Insights". One the right side, the list is labeled, "Actions".

3. As a group, the team organically brings up and discusses observations they made during research and synthesis. When a pattern of observation is made by multiple people in the group, the insight is written down in the left side column. Example: "Only 2 of 12 participants saw the blue button at the bottom of the page."

4. After each insight is discussed, the team decides what an appropriate coordinating action item will be and assigns that action to a discipline or individual. Example: "Move the blue button to the top of the page, @Jane"

5. Continue the discussion until a new pattern emerges from the group and repeat steps 3 and 4 until all patterns seen in that round of research have been exhausted. Ensure that everyone on the team follows up on their action items within the next sprint cycle.

METHOD NAME

Journey Map

WHAT?

A journey map is a visualization of the process that a person goes through in order to accomplish a goal. In its most basic form, journey mapping starts by compiling a series of user actions into a timeline. The timeline is then fleshed out with user thoughts and emotions in order to create a narrative. This narrative is condensed and polished, ultimately leading to a visualization.

WHY?

A journey map is used as an individual actor (a singular customer or user of a product) and specific scenario (of a product or service) to deeply understand a particular business or product in a very focused way. The process of creating a map forces conversation and an aligned mental model for the whole team and the shared artifact can be used to communicate an understanding of your user or service to all involved.

WHEN?

After you've conducted preliminary research and have a clear understanding of your user and their workflow. Beyond that, Journey Maps can be done anytime there is misalignment in understanding a service or experience among members of a team or a team is struggling to make decisions which will move them forward.

PHASE

Anytime

TIME REQUIRED

(1 - 2 hrs)

METHOD PROCESS

1. Set clear objectives for the map. Gather the team working on the map and align on what goals you will be directing the map toward. Have a clear understanding about which persona or archetype the map will be for and what experience it will based upon.
2. If you haven't already, build a profile of the persona or archetype and define their goals (see exercise). Gather that information along with any previously completed contextual inquiry research.
3. Appoint a single facilitator and as a group, using post-it notes and a black Sharpie (for visibility), list out all the touchpoints (places within the product where customers can interact) and place them along a wall in consecutive order, left to right. If you miss a touchpoint or find they are in the wrong order, simply shift the post-its around to correct.
4. Starting at the left again and with a new line below labeled, 'Actions'. List out all of the actions your customers perform throughout their interaction with your service. A long list of actions is fine, you'll get a chance to rationalize your information later. As a team, discuss potential areas where customers may be required to take too many actions to achieve their goals.
5. Once Actions have been identified, again start at the left with a new row (perhaps in a different color post-it) and label the line, 'Emotions & Motivations'. As best as the team is able with the knowledge they currently have, follow and identify the emotional drivers of each action and touchpoint until you reach the end of the map. Knowing this will help the team to provide the right content at the right time.

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PHASE

Anytime

TIME REQUIRED

(1 - 2 hrs)

METHOD PROCESS, CONTINUED

6. On the next line below Emotions & Motivations create one last line (with a different color of post-its) and label it 'Obstacles & Pain Points'. Follow the actions and emotions to identify and label roadblocks for your persona that are stopping them from making their desired action. Highlighting these potential obstacles in the journey can help the team to mitigate them in multiple, creative ways.
7. Once the Journey Map is complete, take a silent read-through as a team and discuss any concerns a member may have about its accuracy. Refine as needed with the understanding that this is a living document which can be refined as the project progresses. At this point it may be good to consider snapping a photo or transferring the Journey Map into a digital format to continue refinement there.
8. As a follow up, consider conducting follow up research to validate the accuracy of the touchpoints, actions, emotions, and pain points within the map. Take the customer journey yourself and refine again as needed.

METHOD NAME

How Might We

(Solution Brainstorming)

WHAT?
A group brainstorming technique, led by a facilitator.

WHY?
To come up with ideas for how to solve user, business and technical challenges as a group with different skills and expertise, hopefully leading to more effective solutions.

WHEN?
Most effective when a team has just completed Discovery and has started to move into the solution space. Can also be a useful exercise for individual features within a product that could be solved in multiple different ways.

PHASE

Framing

TIME REQUIRED

(2 -3 hrs)

METHOD PROCESS

1. Take top 5 pains and write corresponding questions to address deeper needs.
2. Ask the 5 whys.
3. “How might we help ___ with the underlying user need?”
4. Brainstorm ideas row by row.
5. Take 10-15 minutes per row.
6. After 1.5 hours, you’ll have solution ideas for each of the top 5 problems.

METHOD NAME

Generative Interface Creation

WHAT?
Interface creation is a participatory design method.

WHY?
This method is used to learn about the user's understanding of their known problems and the limitations they see in solving them as well as the current patterns and technology they are accustomed to. The drawings are not necessarily meant to be built by the product team but can lead the team into a deeper understanding of what is missing or broken in their point of view.

WHEN?
An exercise to understand the various mental models of a user and how they perceive and understand a system to be.

PHASE
Framing

TIME REQUIRED

(1 -2 hrs)

METHOD PROCESS

1. Recruit your users.
2. Write a script with your team focusing on hypothesis to test and/or problems to learn about.
3. Create a kit of generic interface elements, stickers, markers, scissors, tape, and colored pencils.
4. Test on one proxy user to generate insights or feedback for improvement.
5. Update or improve from what you learned.
6. Test on more users. Preferrably at least 8. Bring along other team members when possible.
7. Stop when you find a pattern in their answers.

TIPS

- The interface they create is not to be the interface for the product.
- Users don't often think outside of their context in which you introduce a creative challenge. Even if a phone call is the simplest answer to, "How do you learn about venue prices?" If you give them an interface they will solve in interface.
- Some users are not visual and will make bullet pointed lists of things. This is OK.

METHOD NAME

Molecule Map

WHAT?
We generate possibilities for product-market fit by listing all potential people, problems, and solutions in client's target space.

WHY?
Align a team around a single product snapshot.

WHEN?
This exercise is done after a team has already aligned around who the target user is and prioritized what the problem is that they will attempt to solve for them. Molecules are a good fit for teams early into framing and are looking to do more generative solution ideation.

PHASE

Framing

TIME REQUIRED

(1 hr)

METHOD PROCESS

1. Get into groups of 3.
2. Draw a triangle with bubbles at each vertex:
    - Top bubble has the word "Person"
    - Bottom-left has the word "Problem"
    - Bottom-right has the word "Solution"
3. Come up with as many solutions as possible.
4. Participants then generate educated guesses for each bubble - one sentence for each.
5. Compare molecules and choose one to move forward with.
    - Treat these as hypotheses or assumptions.
    - Choose one and tape up on wall for a silent read.
    - Ask questions of each other.
    - Dot vote with 3 votes each.
6. One person presents the solution to the larger group.

Note: Chains well into an Assumptions 2x2.

METHOD NAME

Moments of Delight

WHAT?
In this method, a team can ideate different reasons that a user would be attracted to the product by showing the happiness they receive by using it.

WHY?
Helps define the value proposition and empathize with a target user by putting ourselves in their place.

WHEN?
Used toward the end of framing or anytime during delivery to help indivdual product members align on the exact value that a product will bring to a customer.

PHASE

Framing

TIME REQUIRED

(1 hour)

METHOD PROCESS

1. Participants fold up a piece of paper into 6 rectangles.
2. At the top of the paper, they write, “Using (product), (persona name) can...” and then in each box complete the sentence (caption) with a companion illustration.
3. Each box should have the user experiencing the moment of need or moment of delight. At the end, give participants dots (3 usually) and vote on favorite moments.
4. Take the top 3 and move on with those as a focus.

Note: Chains well into Value Proposition.

METHOD NAME

Value Proposition Matrix

WHAT?
This is a quick and cheap way to get insights and validate multiple concepts or product directions by showing users different types of value prop messages. This exercise can be done in person or remotely.

WHY?
To help understand user's perceived needs and how they may react to solution ideas.

WHEN?
Used at the end of framing to validate the usefulness of a tool and general product direction with the intended user group.

PHASE

Framing

TIME REQUIRED

(1 hour prep, 1 hour per user)

METHOD PROCESS

1. Recruit your users.
2. Define your value proposition message that clearly conveys the solution.
3. Create a range that will be used to measure each message. Range: 1-5: One being least valuable and five being most valuable or I want this now!
4. Place one range and one value prop on each page and print them for in-person interviewees.
5. Place those pages into Invision with next buttons for remote interviewees.
6. Show the interviewee each page and have them indicate if they find each message valuable or not.
7. Analyze the patterns after you've interviewed a good amount of folks and you should have good idea of what people think about each concept or idea.

TIPS

- The real secret to this is to ask "why?" after the interviewee makes a decision on each value prop message.
- Make sure you tell the interviewee that these are NOT your ideas and you have no attachment to them.
- Assure them that the only right answer is their honest opinion.

METHOD NAME

Value Proposition (6 ups) Workshop

WHAT?
A collaborative exercise that helps the team examine moments of great need or great delight in a users world.

WHY?
It is helpful to draw things around users, because it leads to a story telling point of view when discussing product. It is also helpful to understand the before after state of the users, and what will be the strongest message to them, prior to deciding exactly what to build. This exercise supports these outcomes.

WHEN?
Used during the beginning of framing to align a team around the value they will be delivering before any feature ideation has been done or any of the content has been written.

PHASE

Framing

TIME REQUIRED

(1 hour prep, 1 hour per user)

METHOD PROCESS

1. Have a great persona developed and readily available.
2. Draw six boxes.
3. In each box, draw a Moment of Delight.
4. Split the room into groups of three.
5. Each person votes on the six moments of delight (three votes for each person).
6. Each group tallies the votes and comes away with one winner.
7. Bring the groups together and determine the overall winner.
8. Extrapolate the winning Moment of Delight into a value proposition.

EXAMPLE

“As Joe, I want to do A, B, C so that _____.”

METHOD NAME

Design Studio

WHAT?
Each attendee brainstorms several individual ideas in order to generate a wide set of concepts. (This is the divergent part of the process.) Attendees should include other practices outside of design to gather disparate ideas from various experiences and models of thought.

WHY?
Used to generate a wide set of ideas in a short amount of time around a known and well understood problem.

WHEN?
After a product solution idea has been prioritized during Framing or at any time during Delivery to ideate on a feature set.

PHASE

Framing

TIME REQUIRED

(1 - 2 hrs)

METHOD PROCESS

Part 1: Diverge

- Give each attendee a 8.5” x 11” sheet of blank white paper and a Fine Tip Sharpie pen. Consistency in tooling means each block of ideas holds equal weight among participants and provides a level of anonymity between participants that reduces bias.
- Each participant folds a sheet of paper in half 2 times, once lengthwise and once again widthwise.
- The facilitator should instruct attendees to open the paper again and see that they now have four equal squares.
- Next place 8-10 minutes on a timer, depending on the complexity of the solution idea, and allow the group to sketch silently and on their own, one in each of the 4 rectangles created. Solution ideas can be drawn zoomed in on one particular feature set or zoomed out to show the whole product. There is no wrong answer or idea.
- If a participant finishes filling their 4 squares before the time is up, allow them to fold another paper and continue generating ideas. Conversely, the facilitator should encourage participants to have at least 4 ideas (all 4 squares) completed by the end of the time allowed.
- Drawings do not have to be detailed or perfect. They should be rough and only used to convey basic concepts or ideas.

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PHASE

Framing

TIME REQUIRED

(1 - 2 hrs)

METHOD PROCESS, CONTINUED

Part 2: Present & Critique

- After facilitator asks participants to post their sketches to the wall. All participants should take time to briefly look over all posted ideas.
- Allow 3-5 minutes per attendee to have them explain their core ideas to the others. Questions for clarification around ideas should be asked during this time, allowing for the natural flow of constructive conversation.

Part 3: Converge

- The facilitator should have 3 dot stickers to present to each attendee.
- Instruct participants to place a dot onto particular features (not squares or sections) that they found interesting. An attendee can use their dots on one particular feature that they feel very strongly about or spread them over three different ideas. The dots are to use at their discretion.
- This is not a vote of which feature ideas to move forward with. Rather it is a simple sentiment analysis which the designer can use to understand which ideas are resonating with their team.

METHOD NAME

Experience Principles

WHAT?
A fundamental concept or proposition which serves as a foundation for a system, behavior, or chain of reasoning.

WHY?
The need to define Design Principles comes from various teams doing different work within one product. Design Principles are a set of guidelines which a team can adhere to when approaching their work.

WHEN?
During Framing or shortly after a solution idea has been testing and a strategic product direction has been defined.

PHASE

Framing

TIME REQUIRED

(1 - 2 hrs)

METHOD PROCESS

1. Give each team member a pack of post-it notes and a black, fine point Sharpie pen.
2. Ask the group to write down one word or a short phrase that encompasses the value of what is implicitly or explicitly helped by what you are creating and/or are Design Heuristics which, if incorporated, will lead to the success of the product. Write one word or short phrase per post-it.
3. Set a timer for 5 minutes and allow for self-reflection and silent generation of ideas.
4. Once the 5 minutes are up, place the post-its up on a board/wall or window and group the most popular phrases together at the top of the board, filtering the less common ones lower down on the list.
5. Either with smaller stickers or with the pens, allow each team member to place 3 votes on or next to each group. Note: Dot voting is a necessary step because having a low quantity of post-its within a group doesn't necessarily indicate that the principle should be included in the final list.
6. Observe the results of the dot vote and as a group write a final list of the Experience Principles that you've aligned around in a place where the team will consistently notice them and keep them. Refine phrases down to one or two words for easy recall, if possible. If you feel compelled to add additional context to each principle, write one sentence description below the item on how on the team is expressing the relevance of the item to the product.