

# IBM Design Thinking

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READ, PRACTICE, CREATE, ASK

# IBM Design Thinking

DELIVERING GREAT USER EXPERIENCES



Invest for Market Outcomes

**Hills** focus your project on big problems and outcomes for users, not just a list of feature requests



Envision the User Experience

**Sponsor Users** help you design experiences for real target users, rather than imagined needs



Collaborate, Align, Engage!

**Playbacks** align your team, stakeholders, and clients around the user value you will deliver, rather than project line items



Welcome



Core  
Practices



Design  
Thinking



Collaboration

# Welcome

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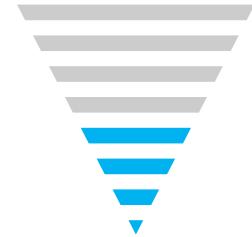
WE WANT  
ALL OUR  
PRODUCTS AND  
SOLUTIONS TO  
WORK TOGETHER,  
WORK THE SAME  
AND WORK  
FOR ME.



Works together



Works the same



Works for me

Great brands differentiate themselves through the design of their products and services. It's the design that guides the experience, and it's the experience that elicits emotion from the user. It may be positive or negative, but it's there.

Each product in our portfolio delivers an experience. Ideally, that experience is intuitive, familiar, and delightful across all products. If it's hard to use, then our clients' experience isn't good, and there's no intrinsic reason to purchase additional capabilities from IBM; clients will always look for something better, and every sales cycle has to stand on its own.

Our clients want a simple, holistic relationship with IBM. And we want our products to give natural advantage to each other. Thoughtful and intentional design offers a solution.

IBM Design's mission is to unite IBM so that we work in concert to deliver solutions that delight our users individually and deliver increasing value for every additional IBM capability they consume. In order to do this, Product Management, Design, and Engineering must understand each other as well as we collectively understand our clients' needs.

We want all our products and solutions to Work together, Work the same, and Work for me.



Welcome



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IBM DESIGN  
THINKING IS  
A SCALABLE  
WAY TO CREATE  
GREAT USER  
EXPERIENCES  
AND A  
PORTFOLIO  
THAT LEADS TO  
GREAT CLIENT  
EXPERIENCES.

This last statement, Work for me, is interesting. It doesn't sound quite right when you're reading this document as an IBMer. The "me" we need to put front and center is the person who is using the products we create. Our portfolio statement is intentionally drafted to an aspirational user response for when someone asks, "Why do you love IBM so much?" The user should reply, "Because their solutions work together, work the same, and work for me."

The "me" says two things. First, it says "me," an individual, real human being. It's not a persona; it's not a market or a company or a buyer. It works for "me!" This is a critical shift in our mental model for delivering products and solutions. No longer will we optimize for technology's sake; rather, we optimize for the user: for me.

IBM Design Thinking is our approach to delivering products that deliver on this aspiration. It does this by combining design thinking—a powerful way to define and solve problems—with three unique new core practices: Hills, Sponsor Users, and Playbacks. These may appear similar to concepts in Lean or Agile, but they aren't. This unique new system will drive focus into your releases even as it solves bigger problems. It will require you to solve those big problems for real people, ensuring that we hit unforeseen roadblocks early, before we get to market, even as it ensures we solve those problems more thoughtfully. Finally, it aligns everyone, early; not just the product team but the entirety of IBM.

IBM Design Thinking is a scalable way to create great user experiences and a portfolio that leads to great client experiences.

I look forward to the journey we're embarking on together; the journey to design and deliver products that Work the same, Work together, Work for me. IBM Design Thinking is our guide.

**Phil Gilbert**

*General Manager, IBM Design*



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DESIGN MUST  
REFLECT THE  
PRACTICAL AND  
AESTHETIC IN  
BUSINESS BUT  
ABOVE ALL...  
GOOD DESIGN  
MUST PRIMARILY  
SERVE PEOPLE.

— THOMAS J  
WATSON

## Core Practices

IBM Design Thinking introduces three core practices to help solve a number well-known issues that IBM experiences during product delivery.

### The Hills

IBM product teams are very complex. You work on multiple releases in a highly distributed team often without having met your colleagues face-to-face. Your current clients have a hundred different feature requests, and your execs don't have a way to target conversations about your product. Feedback can be narrow and off point. Sales teams don't know what's in the pipeline in a scalable way, so Product Line Management (PLM) is pulled into pre-sales situations too early and too often. Instead of listening and driving a market, PLM is pitching in non-leveraged ways. The Hills are meant to address these problems as you Invest for Market Outcomes, the first principle of IBM Design Thinking.

Hills provide a new business language for alignment around user-centric market outcomes, not feature requests, that you can apply at large scale across all of IBM. Hills will help you internally to align your team around the major market-driven goals that you have to tackle. Externally, they will help you in client conversations to align the go-to-market opportunities.

This new business language is rooted in user needs and desires. Each Hill will be expressed as an aspirational end state for your users that is motivated by market understanding. Hills define the mission and scope of a release and serve to focus the design and development work on your desired outcomes. Capturing market opportunities is more important than merely evolving your product based on the needs of current clients. For each project, you will define no more than three major release Hill objectives plus a Technical Foundation (for serviceability and paying down technical debt). Each individual Hill articulates a clear and containable scope defined to be achievable in one release or in a finite set of releases. You will apply design thinking methods to converge on a direction that best achieves the Hills.



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## Sponsor Users

User-centric design requires developing empathy with real users. User archetypes like personas can only go so far, typically to around 80% of understanding user needs. Participation with real people is what gives you the 20% of edge cases that will make your user experience great. At IBM, client relationships span continents and thousands of releases for thousands of products. Sponsor Users are select clients who work alongside your team and with whom you have legal agreements. They will help you scale your ability to create empathy and transform your release planning. As you engage them on a regular basis throughout the release cycle, your relationship will deepen, and their feedback will give you direct insight into the specialized needs of their business domain. As you apply our second principle, Envision the User Experience, using design thinking, Sponsor User collaboration with your team ensures that your product is valuable, effortless, and enjoyable.

## Playbacks

All design and development work is iterative, and teams use any number of techniques to share their work with one another. In order to scale in an iterative world, IBM Design Thinking formalizes these sessions into iconic Playback milestones that align teams, stakeholders, and clients around scenarios that show the value of your offering. Playback stories should be compelling enough for keynote speeches or executive sales pitches.

With your team, you will use the Hills Playback, Playback Zero, and Delivery Playbacks to get feedback, check your progress against your original goals, review designs, and communicate the current state of your work to the broader team. The goal of the Hills Playback is to align on the three primary Hills of a release, or set of releases. Then, after a period of using design thinking to refine your Hills and envision the user experience, you will again align at Playback Zero. By this milestone, you will have a number of design artifacts to help you understand what it means to achieve a given Hill from a user's perspective, and Engineering will be able to communicate their containment statements. This milestone marks the beginning of the large-scale development phase during which you will hold Delivery Playbacks to review your progress on delivering end-to-end scenarios.



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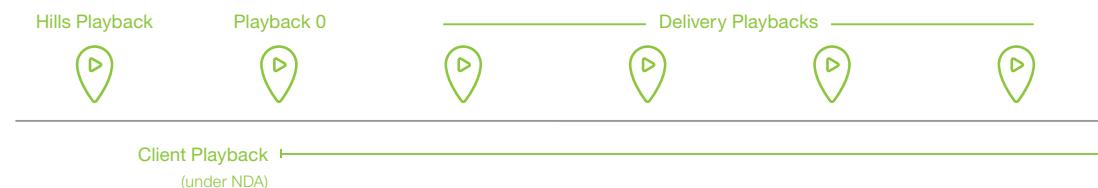
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Externally you will hold Client Playbacks for both existing and prospective clients under a non-disclosure agreement (NDA). During these Playbacks, your sales, marketing, and executive groups can communicate your product roadmap in a legal and aligned way that scales access, reduces the noise of nonspecific conversations, and improves the quality and consistency of feedback to you. The Client Playback reflects the same user-centric focus of other Playbacks and is actively updated throughout the project to include Hills, scenarios, and storyboards.

Playbacks will facilitate the frequent communication, trust, and agility among your team and with your clients that helps you all keep your eye on the user experience as you execute our final principle, Collaborate, Align, Engage!





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DETERMINE THE REAL PROBLEM...  
CONSIDER A WIDE RANGE OF POTENTIAL SOLUTIONS...  
CONVERGE ON A PROPOSAL.

—DON NORMAN

# Design Thinking



The IBM Design Thinking framework encourages the use of design thinking methods to envision the user experience. Design thinking requires diverging on many possible solutions and converging on a focused direction. One great way to avoid getting too attached to a singular solution is to generate multiple alternatives. Fail early to maximize learning and avoid waste. Expect to use design thinking most heavily in preparation for your Playback Zero, but it's always available.

You will practice design thinking as you Understand users, Explore concepts, Prototype designs, and Evaluate with users and stakeholders. This work may be iterative or non-linear and can be used whenever you need to push the experience forward, diverge, or check in with users.

Design thinking methods are uniquely poised to tackle design problems. Unlike other practices, they're specialized to deal with ambiguity, foster team collaboration, and ground the team in deep empathy for the user. The team must enter design thinking activities open to new ideas, ready to collaborate across functions, and prepared to think visually and physically, whether in person or remote.

When developing empathy for your users in Understand, use research methods like ethnographic observation and user surveys. This work informs personas representing the people for whom you are designing and the as-is scenarios that surface the problems your new software will solve.



In Explore, really diverge your thinking to come up with new concepts and to-be scenarios. Because of time pressures and eagerness to get to solutions, you can easily forget to consider many options. Use insights from your user research in your explorations. Continue to diverge and converge your concept into to-be scenarios.

Once you have explored many ideas, it's time to Prototype and progress from the abstract to the tangible. Design the user experience to play out your to-be scenarios and discover unknowns as early as possible. Design "fast and dirty" with just enough substance to be useful for user feedback, and increase the detail and depth as you validate your decisions. An important characteristic of prototypes is their "throw-away" nature, so it's important not to confuse them with product coding. Don't lose the vision and what you know about the user. Focus on the user experience, not just a user interface.

Evaluate with users and iterate to help to verify whether the proposed designs are usable and effective. Usability testing combined with Playbacks to Sponsor Users and stakeholders are best practice in this space.

As you read further in Practice and Create, you will learn that your design thinking work products will be referenced as Design Artifacts that you will refine and harden in Alignment Documents.



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IBM DESIGN  
THINKING—THE  
APPLICATION OF  
DESIGN THINKING  
BY LARGE TEAMS  
DEVELOPING  
COMPLEX  
PRODUCTS AND  
SERVICES.

## Collaboration



IBM Design Thinking is built from the ground up as an approach to engage PLM, Design, and Engineering in a collaboration framework. The framework maintains that all disciplines execute in concert all the time to solve problems in ways that take advantage of discipline-specific skills. Key to any delivery methodology is the ability to fail, make pivotal decisions, and keep moving forward with alignment and focus.

You will structure your team collaboration and release journey around alignment on the Hills (the target business outcomes) and Playback milestones. To be successful, it's useful to maintain clear decision makers to facilitate fast-paced iteration. Each of PLM, Design, and Engineering takes the lead at appropriate times during the release cycle. PLM leads defining the business objectives, and the Hills Playback and delivers content for the Client Playback. Design leads applying design thinking to arrive at user-centric solutions and Playback Zero. Engineering leads building the market-facing delivery and Delivery Playbacks. Throughout the entire release cycle, the team engages with Sponsor Users to keep focused on the user experience.

For your team to be ready to take full advantage of IBM Design Thinking, you will first and foremost need to commit to a collaborative, cross-discipline way of working throughout the entirety of a release. In particular, target a PLM-to-Engineering ratio of 1:16 or better (with PLM-to-Developer ratio of 1:8) and a Designer-to-Developer ratio of 1:8 or better. We define Developers as coding Engineers. Each project



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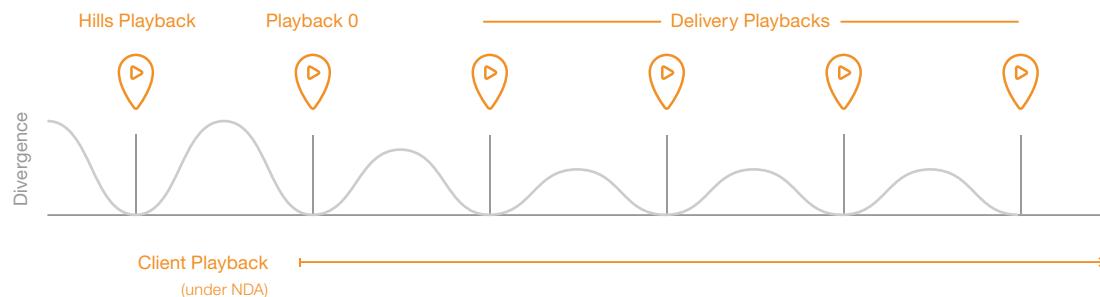
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will need a leadership team with one member from each of PLM, Design, and Engineer. If your project is sufficiently large, you will want to determine such a leadership team for individual Hills. For each complex Hill, you should engage at least one Sponsor User. At the executive level, you need to have the participation and buy-in of key stakeholders and the support from your General Manager down.

To start your team's collaborative journey to usable products, keep reading in Practice and Create to go deeper into the working details of IBM Design Thinking.





In Practice



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# Principles in Practice



## GO DEEPER INTO THE PRACTICAL DETAILS

In the previous section, Read, we covered just enough detail on the concepts of IBM Design Thinking to give you a high-level understanding of the framework.

Next, in Practice, we will take you deeper into the working details. By the end of this section, you should have enough information to bootstrap your practice.

We'll go into the three Core Practices that help solve a number well-known issues that IBMers experience during product delivery, design thinking methods, and the collaboration model and release journey. You'll learn how each role collaborates during the release cycle while constantly aligning and brainstorming between Playbacks. This guide is interactive. For many of the concepts that follow, you will find links on the right of each page that jump you to the related pages in the Create and Ask sections. There you will find more detailed how-to help and answers to frequently asked questions to further your mastery of IBM Design Thinking.

Ask

What's new in IBM Design Thinking?



In Practice



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# Hills

## USE A NEW BUSINESS ALIGNMENT LANGUAGE

As discussed in [Read](#), Hills are an important core practice to help you deal with the complexity of development at IBM. The Hills address this complexity by establishing a shared business language focused on market outcomes and rooted in the needs and desires of users. They are integral to your success as you apply the first principle of IBM Design Thinking: Invest for Market Outcomes.

Compared to traditionally open-ended feature lists or release themes like “Enhance UI” or “Improve Performance,” Hills scope significant outcomes that you define in easy to understand, user-centric language and where possible make clear the value that users and the business will derive from your offering.

A good Hill is centered on a user role (or specific group of user roles), describes a problem that you’re solving or desire you’re fulfilling for that user role, and has a measurable target so that you can objectively determine if you have succeeded. Once you have written your Hills, you will apportion your limited resources across them leaving some percentage of your resource for Technical Foundation. Clearly apportioning resources gives your team the ability to address a small number of primary must-ship objectives with single-minded focus. Hills also drive alignment across the broader, cross-functional team and focus the team’s field of inquiry.

For each Hill, you will need a Hill leadership team. Large teams may have different leads for every Hill in each of Product Management, Design, and Engineering while small teams may have a single lead on multiple Hills. The leadership team is accountable for achieving the Hill and has the authority to invest the allocated development resources and handle day-to-day triage. However, the investment allocations are considered, “thread-safe”, so if a Hill

## Create



Survival Kit - Hills



Release Blueprint



Playback Kit

## Ask

What makes a good Hill?

How do we get to the Hills Playback?

Who attends the Hills Playback?

What do we do if our Hills are very complex?

How many scenarios belong in a Hill?

How do we get from Hills to scenarios to epics and user stories?

How are Hills different from a roadmap?

What do we put in Technical Foundation?

What Hills do we include in Playback Zero?



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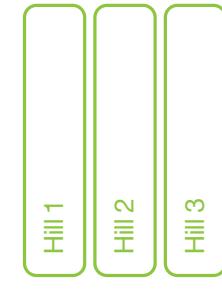
Collaboration

requires additional resources (or has excess bandwidth), the senior Product Management leadership has to be consulted to re-allocate across Hills.

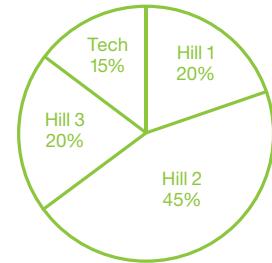
You will draft the initial project Hills early in the project and present them at your first milestone, the Hills Playback. You will refine and improve the Hills during a period of design thinking activities and present them at the second milestone, Playback Zero, after which they are finalized.

You can use the Survival Kit Hills worksheet to jump-start your draft Hills and the Release Blueprint to document their progress as you keep your team aligned.

Product Management leads Hill writing and works with Design and Engineering to refine and clarify them.



Thechnical Foundation





In Practice



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# Sponsor Users

## EMPATHIZE WITH USERS

As discussed in [Read](#), Sponsor Users are select clients who work alongside your team and with whom you have legal agreements. They will help you scale your ability to create empathy and transform your release planning as you apply the second principle of IBM Design Thinking: Envision the User Experience.

Sponsor Users can come from many places and are different from real users and personas. Real users are people you know, like clients, who express concrete needs. From those concrete needs, you will add characteristics to represent the market, and create representative personas. The persona becomes a communication tool that helps you to scale empathy across a large internal stakeholder population. A Sponsor User might be the original person you based your persona on, but generally it is not. Rather, a Sponsor User is somebody who shares a lot of the persona's characteristics and, not least of all, has the willingness to invest the time and effort to work with your team.

A useful best practice is to have one or two Sponsor Users for each Hill. As such, you will recruit a Sponsor User after your team agrees on your Hills. From this point on, Sponsor Users will help you surface many aspects of the problems that you're trying to solve in a Hill. Since Sponsor Users represent the problems, they are also critical in validating the solutions that you are envisioning, designing, and implementing. Overall, Sponsor Users help you to avoid the common pitfall of thinking in terms of features and functions and to adopt the perspective of a real user solving a real world problem. The role of a Sponsor User is not to provide a wish list of features.

## Create

Playback Kits

Playback Kit

## Ask

How do we use the Client Playback Kit?

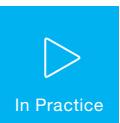
Where do we find Sponsor Users?

What makes a good Sponsor User?



■ Field research and personas

■ Sponsor Users



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Creating and maintaining relationships with potential Sponsor Users is a continuous activity. Often, you will surface their interest for deeper engagement when doing product briefings and roadmap presentations. You will recruit specific Sponsor Users during the first part of your release and interact with them for feedback and validation throughout the entire release lifecycle.

Product Management interviews and recruits Sponsor Users with help from Design. Ideally, you will maintain a “pipeline” of candidates from a pool of clients, partners, or internal IBMers with whom you have forged long-term relationships.



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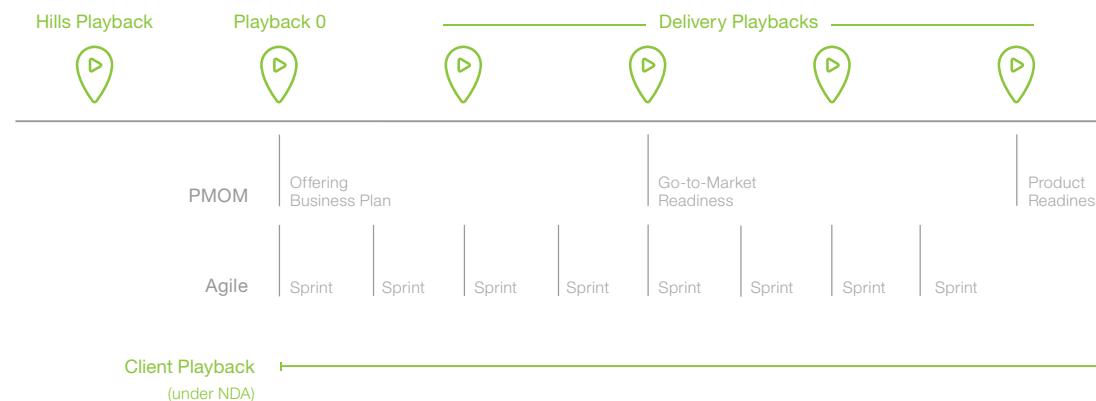
Client Playback

# Playbacks

## TELL COMPELLING STORIES

As discussed in [Read](#), Playbacks are iconic milestones that align teams, stakeholders, and clients around scenarios that show the value of your offering. Playback stories should be compelling enough for keynote speeches or executive sales pitches. Playbacks help your team, stakeholders, and clients keep an eye on the user experience as you execute the third IBM Design Thinking principle: Collaborate, Align, Engage!

There are points in time where IBM Design Thinking Playbacks align with Product Management Operating Model (PMOM) Decision Checkpoint Content (DCPs). Most prominently, the project definition as defined at Playback Zero—the Hills, their associated investment allocations, and scenarios—flows into the Offering Business Plan (OBP) DCP of PMOM, along with the supporting market and competitive analysis. Further down the project cycle, the Go-To-Market Readiness and Product Readiness DCP Content are informed by the Client Playbacks and Delivery Playbacks, respectively, and the adjustments that have occurred since Playback Zero. There's more flexibility in the timing of these checkpoints.





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# Hills Playback

The Hills Playback commits the team to the mission for the release through a draft version of the Hills and the personas that underlie the Hills. A successful Playback signals alignment and commitment to specific delivery outcomes.

The content of this Playback communicates the user-centric Hills that articulate the market opportunity for this project in terms of improvements to the user experience and the business hypothesis that they support. You'll also communicate the resource allocation for each Hill, the content of your Technical Foundation, your team composition, and the delivery timeline. PLM should keep the team aligned around these elements by regular updates to the Release Blueprint.

The Hills Playback is useful as an early intervention to surface misalignment. But you can socialize the Hills before the Playback to get buy-in. Having a number of pre-Playback meetings with a variety of stakeholder groups is a good way to do this. PLM should involve your team in writing the Hills. Workshopping is a common way to get team participation and early buy-in.

Sometimes there's a tendency to wait too long to hold the Hills Playback. Even if you don't feel quite ready, set a meeting date and invite the team and key stakeholders. Using the Hills Playback Kit, start building your deck with what you know and leave placeholders for what you don't know.

Product Management leads the Hills Playback. The participants are the cross-functional leaders of your project (for the releases in hand), the key up-line executive stakeholders (essential), and the larger team (at the discretion of the leaders as to what is appropriate). Do not plan to include Sponsor Users in the Hills Playback meeting. As a best practice, record your Playback for those who cannot attend.



## Create

Release Blueprint

Release Blueprint

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## Ask

What makes a good Hill?

What do we put in Technical Foundation?

How do we get to the Hills Playback?

Who attends the Hills Playback?

How complete does the Release Blueprint need to be by when?



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# Playback Zero

Playback Zero aligns the team around a finalized version of the Hills and the user experience to achieve them.

The work leading up to this milestone is where you will use design thinking most heavily. The cross-functional team is collaborating and doing a lot of negotiating to resolve critical open questions about how to achieve the Hills from the perspectives of user needs, technical implementation realities, and the product's market direction. Design facilitates high-speed visualization of solution spaces. Engineering works on containment planning and sizing by doing enough engineering to understand technical feasibility and to express doability of the user experience. Marketing crafts the enablement plan as they prepare for the first Client Playback. One of your most important goals should be to develop compelling to-be scenarios for each Hill. You'll refine the scenarios as you answer questions about the business, user experience, and technology. As you learn more, modify the Hills until they align with the market objectives and the user needs.

As the team converges on a set of to-be scenarios, Engineering should begin documenting all the functionality to enable the scenarios for the user stories organized into epics. The basic principle is that Hills decompose into a set of scenarios, that in turn map to epics that contain codable user stories. Ideally, the reverse is also true, meaning that most user stories can be traced back to the user experience.

The content of this Playback communicates the final state of the Hills and storyboards. Present high-fidelity scenarios for each Hill with mid-fidelity wireframes—low enough to leave room for refinement during the rest of the project, but high enough to get meaningful feedback. Your scenarios should reflect your Minimum Value Product (MVP).



Create

Playback Kits

Playback Kit

Ask

How do we get from Hills to scenarios to epics and user stories?

What Hills do we include in Playback Zero?

How do we get to Playback Zero?

Who attends Playback Zero?

How does PMOM relate to IBM Design Thinking?

How complete does the Release Blueprint need to be when?

What is the Minimum Viable Product (MVP) line?



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To gain consensus and share design iterations along the way, you will likely hold a number of pre-Playback meetings leading up to the Playback Zero milestone. From a Product Management perspective, you should schedule this Playback ahead of the Product Management Operating Model (PMOM) Offering Business Plan (OBP). This best practice ensures that the OBP is based on robust Hills, to-be scenarios, and user experience designs, around which there is strong alignment across the team.

This milestone marks the beginning of the large-scale development phase, so ensure that both the design and the team are ready to transition to final release planning and start of coding. Assign Playback roles and prepare team members and Sponsor Users to deliver the Playback.

At the Playback, present the final version of the Hills and confirm that the team and stakeholders have bought into their contents. At this milestone you should not expect discussion on the Hills since you've been working hard to finalize and socialize them. Then, demonstrate a convincing scenario in support of each Hill, incorporating personas.

Design leads Playback Zero in close collaboration with Product Management and Engineering. The development team; key internal stakeholders such as sales, marketing, and services representatives; and Sponsor Users attend. As a best practice, record your Playback for those who cannot attend.



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# Delivery Playbacks

Delivery Playbacks of coded stories keep your to-be scenarios in focus as implementation moves forward. Run one or more Playback to communicate progress on the to-be scenarios, keep the team focused on the Hills, and capture feedback from stakeholders. If necessary, supplement gaps in the to-be scenario with high-fidelity mockups.

You should plan to hold Delivery Playback milestones whenever major to-be scenarios are demoable. In longer development projects (greater than three months), plan to hold multiple Delivery Playbacks to give stakeholders visibility into the evolving implementation. In projects consisting of one or more shorter releases (no longer than three months), plan for only one or two Delivery Playbacks before release.

At the Playback, set the context then demo the to-be scenario as implemented to date. In some Playbacks, ask your Sponsor User to run the demo, and focus your team on making your Sponsor User(s) successful in the weeks leading up to the Playback.

As a best practice, hold a final Delivery Playback before you release code and as culmination of the release. By holding a Playback of completed to-be scenarios prior to actual release, you keep your entire team focused on delivering the best outcomes for users, and summing the Hills for the project. It's also an opportunity to showcase the work of the team to stakeholders. A final Delivery Playback also informs the PMOM Product Readiness Checkpoint.

The Engineering team should have responsibility for Delivery Playbacks involving executable code. Invite the whole team and a circle of trusted stakeholders from sales, marketing, services, and support. As a best practice, record your Delivery Playbacks for those who cannot attend.



Ask

How do we prepare for Delivery Playbacks?

What is included in the first Delivery Playback?

How do we plan Agile iterations?

How does PMOM relate to IBM Design Thinking?



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# Client Playback

Held under NDA, the externally facing Client Playback communicates the direction of a product and is structured around the Hills. It provides an efficient means for your sales, marketing, and executive groups to communicate roadmap items to clients with specificity, get quality feedback on those items from a larger set of clients, and create an emotional attachment between the client and the product.

The Client Playback is product-centric, and lists the specific Hills in scope for the next release. It also contains the Design Artifacts at their current level of maturation. When you first update the Client Playback deck with the finalized Hills, the artifacts will be low-to-medium fidelity. By the time you reach the first of your Delivery Playbacks, the artifacts will be medium-to-high fidelity until eventually the deck contains actual screenshots from code builds later in the cycle. Client Playbacks also inform the PMOM Go-to-Market Readiness DCP.

Product Management and Design jointly maintain the Client Playback deck. Product Management typically provides the problem statements and Hills while Design uses design thinking methods to flesh out the envisioned solution with mockups and other Design Artifacts. As a best practice, consider updating this deck after Playback Zero and again after each Delivery Playback.

## Create

Design Artifacts

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## Ask

When do we use Design Artifacts?

How do we use the Client Playback Kit?

How does PMOM relate to IBM Design Thinking?



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Overview  
Understand  
Explore  
Prototype  
Evaluate



# Design Thinking

## GENERATE BREAKTHROUGH SOLUTIONS

As discussed in [Read](#), The IBM Design Thinking framework encourages the use of design thinking methods to envision the user experience. You will practice design thinking as you Understand users, Explore concepts, Prototype designs, and Evaluate with users and stakeholders.

Design thinking activities and exercises are enabled by Design Artifacts. There is no end to the artifacts that you can invent. In the following pages we give suggestions for a wide variety including various maps, wireframes, and grids. In the Survival Kit, you can find worksheets and use them to help jump-start thinking with your team and Sponsor Users. As a best practice, keep the entire team aligned by using the Release Blueprint to link to Design Artifacts by Playback Zero.



### Create

Design Artifacts

Design Artifacts

Survival Kit

Survival Kit

Release Blueprint

Release Blueprint

### Ask

What makes a good Hill?

What do we put in Technical Foundation?

How many scenarios belong in a Hill?

How do we get to Playback Zero?

What Hills do we include in Playback Zero?

When do we use Design Artifacts?

How complete does the Release Blueprint need to be by when?



# Understand

## DEVELOP EMPATHY FOR USERS

Understand grounds designs in deep empathy for users. With the Hills as a jumping off point, use generative research methods to reframe the problem and identify opportunities for advancing the user experience. These methods range from broad surveys and analysis of user activity to deep contextual inquiry, or on-site observation. Recognize that any time you take users out of their work context, you may miss out on key observations about their workflow, like workarounds and cheat sheets. Bring two people on site—one to ask questions and another to document notes and visual media. Keep your interview questions objective.

Distilling observations makes a great team activity to create shared empathy. Write one observation per sticky note and post it to the wall (or a row in a collaborative document). Remix your observations by clustering them or seeking trends and outliers. Converge on a set of personas and scenarios.

A persona is an archetype of a user that helps Designers and Developers empathize by understanding their users' business and personal context. By basing personas on user research, you can avoid the pitfalls of designing for anecdotal, "fake," or extreme users. Identify each persona by a name, role, defining attributes, goals, and needs. Don't confuse personas with roles: if a Hill specifies focus on a salesperson, seek out the full range of salespeople. Do they vary in skill levels or needs?

While personas come in many levels of fidelity, IBM Design Thinking recommends Empathy Maps for rapid prototyping, the Release Blueprint wiki for refining and sharing, and slides for reinforcing at every Playback. Personas can be powerful communication tools; all Engineers should know whom they're developing for by name.

### Create



#### Empathy Map



#### Scenario Map



#### Release Blueprint

- Overview
- Understand
- Explore
- Prototype
- Evaluate



Overview  
Understand  
Explore  
Prototype  
Evaluate



It's also important to understand the experiences users are having, so you will also generate as-is scenarios. A scenario is a workflow for one or more personas. Scenarios are minimally captured in written text form, but may also be conveyed orally, as a storyboard, or as a video (for example). Like any good story, it begins with a motivation and involves a series of steps toward an (intended or unintended) outcome. IBM Design Thinking recommends Scenario Maps to rapidly prototype scenarios as a way to identify pain points of users and opportunities for design.



In Practice



Core Practices



- Overview
- Understand
- Explore
- Prototype
- Evaluate



Collaboration

# Explore

## DIVERGE AND CONVERGE THINKING FOR FRESH PERSPECTIVES

Explore is marked by generative thinking and divergence to arrive at breakthrough design concepts. Using the pain points and opportunities identified in Understand as problem statements, hold ideation sessions to shift your thinking. First, diverge on many possible ideas—one per sticky note (or row of a collaborative document). Don't hold ideas back or shoot others down; the most absurd ideas often shift thinking to arrive at brilliant ones. To encourage participation from all team members, ask each to write 10 ideas and post them to the wall. Remix those ideas by clustering the notes and combining them into new ideas. To converge—on a cluster or final idea—vote with strips of sticky notes. The Survival Kit outlines best practices for ideation, clustering styles, and transformations to unstick your thinking.

In parallel, generate to-be scenarios for your users. Using a Scenario Map, outline a new scenario with a motivation, steps, and an outcome. Scenario Maps facilitate brainstorming on scenarios and force the team to capture small gaps and new details to delight users. Any time you hit a block, break out of the map and ideate on potential solutions.

Visual Designers and Engineers also have roles to play in Explore. Visual Designers will use Moodboards to explore how they want users to feel when engaging with the offering. And Engineers will begin to identify technical questions raised by the conceptual design.

Explore can generate many possible scenarios. Keep these documented in the Release Blueprint and prioritize them against the Hills. Compare the gains they will afford in achieving the Hills with the costs of developing the end-to-end experiences.

## Create



Survival Kit



Scenario Map



Release Blueprint



In Practice



Core Practices



Overview

Understand

Explore



Design Thinking

Prototype

Evaluate



Collaboration

# Prototype

## CREATE THROW-AWAY ARTIFACTS TO GET TO DECISIONS QUICKLY

Prototype hardens your concepts into artifacts that can be evaluated and refined into final user interfaces. Start by generating systems-level views of your offering, such as navigation flows. For each screen, diverge on many possible Wireframes. You want these prototypes to be “fast and dirty” with just enough substance for users to give feedback. Start low-fidelity with minimum detail to reduce anchoring to designs you’ve invested time in. An important characteristic of Prototypes is their “throw-away” nature, so it’s important not to confuse them with product coding. Low-fidelity Wireframes also engage the team; you can generate them collaboratively on a whiteboard or run them by teammates for rapid feedback.

When prototyping, consider the following cognitive principles for reducing complexity. Make your information scannable, memorable, contextualized in space, and presented when it’s relevant. In designing interactions, use “affordances” to signal what users can do, convey metaphors like “flipping pages” to ease adoption, give feedback, and prevent and reverse user errors. Remember to consider how the design will render across devices.

As your design decisions harden and Wireframes increase in fidelity, visual and interaction design becomes increasingly important. Refined color, typography, layout, transitions, and animations can convey those feelings and signal quality to users. Engineering should develop technical prototypes to explore feasibility and unlock new ideas enabled by technology.

Remember to revisit your systems and scenario views as you prototype. How do your Wireframes look mapped onto your navigation flows or a storyboard? These views will help fill gaps for more seamless experiences.

Create



Wireframe



UI Spec



In Practice



Core Practices



- Overview
- Understand
- Explore
- Prototype
- Evaluate



Collaboration



By Playback Zero, you should have mid-fidelity Wireframes ready to present as a storyboard—enough detail to get meaningful feedback but leaving room for learning and refinement during development. From here on, design decisions should be hardened in the User Interface Specification (UI Spec).



In Practice



Core Practices



Overview

Understand

Explore

Prototype

Evaluate



# Evaluate

## TEST YOUR PROTOTYPE, BUILD IT DIFFERENTLY, TEST IT AGAIN

Evaluate is your checkpoint to decide whether to revisit the other design thinking spaces or move forward. Evaluative research methods range from surveys, in which users review their own experiences, to usability tests, in which a user is observed completing a task. Usability tests require objectivity and should be conducted by a Design Researcher in person or remotely using video or screen capture.

Sponsor Users are powerful allies and should be invited to give feedback regularly. Since they are embedded in teams, they can review lower-fidelity wireframes and concepts without the formality of a usability test. It is still best practice to prepare storyboards for users to evaluate end-to-end scenarios.

You'll also want to evaluate with uninitiated users. They can be recruited through sales channels, customer conferences, social media, client sites, or the IBM Usability Participant Database. Use intrinsic motivators whenever possible, though honoraria are available within certain criteria.

Document and review this feedback rapidly using a Feedback Capture Grid, which uses sticky notes (or collaborative documents) to diverge on feedback and converge on a direction for moving forward.

Lastly, you'll want to evaluate with other team members and stakeholders to ensure alignment in time for Playbacks. When the team feels it has aligned on the scenarios to deliver, you should engage in Story Mapping to evaluate the size of the design and contain it to a minimum viable product. The contained design should be presented at Playback Zero.

Create



Feedback Capture Grid



Story Map



# Team

## ITERATE AND COLLABORATE

As discussed in [Read](#), IBM Design Thinking is built from the ground up to engage PLM, Design, and Engineering in a collaboration framework. The framework maintains that all disciplines are executing in concert all the time to solve problems in ways that take advantage of discipline-specific skills. Key to any delivery methodology is the ability to fail, make pivotal decisions, and keep moving forward with alignment and focus.

Team interactions are constant as everybody is evaluating progress against the Hills. Design applies design thinking to present solutions. Engineering codes solutions to learn what is technically achievable. In cases where the proposed solutions don't match with technical feasibility, Design and Engineering collaborate to converge on new, feasible solutions. Hills and the scenarios that support them are the team's alignment focus. The team is further empowered by the underlying resources investment model.

PLMs are responsible for understanding the market opportunity and writing the project definition. They deliver the Release Blueprint and Hills definitions, recruit Sponsor Users, work on people metrics, and own the Playback strategy and timeline. They lead the Hills Playback and deliver content for the Client Playback. Design is responsible for the user experience and functional design. They deliver the UI Spec, personas, and the as-is and to-be scenarios. They lead design thinking activities and Playback Zero. Engineering is responsible for technical design and implementing market-facing deliveries. They deliver executable code, architecture and specifications, Technical Prototypes, and Story Maps. They lead the Delivery Playbacks. Throughout the entire release cycle, the team engages fully with Sponsor Users to keep focused on the user experience.

### Create

-  Alignment Documents
-  Technical Prototype
-  Story Map
-  Release Blueprint
-  UI Spec



# Timeline

## TRAVEL FROM HILLS TO FINISHED CODE

Now that you have a better understanding of the IBM Design Thinking framework, let's review how the practice comes together so you can deliver great user experiences.

Prepare to hold a Hills Playback with your team. This involves the three Core Practices: developing your Hills, onboarding your Sponsor Users, and scheduling the remainder of your Playbacks. You should also begin involving your team in targeted design thinking activities to get used to a new way of working and onboarding team members onto the Release Blueprint.

Design will lead the team working alongside Sponsor Users to design a vision for the user experience that achieves the Hills. You will use design thinking methods to Understand your users, Explore scenarios, Prototype interfaces, and Evaluate your work with users and stakeholders. Here, the team finalizes the Hills, decomposes them into actionable user stories, and explores designs for an engaging and effective user experience. The team formally aligns for a second time at Playback Zero. By this time, the scenarios are contained and translated to codeable units. However, the need for future change and refinement means that Design will continue many design thinking practices, even as the team moves forward into large-scale development.

Engineering takes the team to the release with iterative implementation of the user story Backlog as executable code. In close communication with Engineering, Design continues to increase the fidelity of the design, test the results with users, and iterate to ensure that the results are technically deliverable. The team will refine and deliver the experience over one or more releases, aligning on progress against end-to-end scenarios at Delivery Playbacks. In a final Delivery Playback, you should showcase the work to

### Ask

How do we get to the Hills Playback?

How do we get to Playback Zero?

How do we prepare for Delivery Playbacks?

How are Playbacks like sprint demos?

How do we plan Agile iterations?

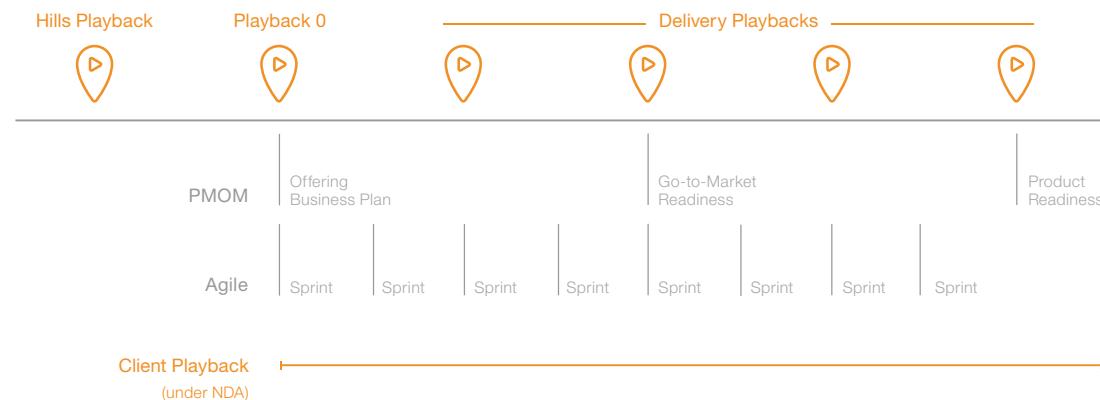
How do we apply the IBM Design Thinking framework with staggered releases?



stakeholders and tell the to-be scenarios prior to actual release.

Beginning around the time of Playback Zero and continuing as appropriate until release, Client Playbacks keep both existing and prospective clients aligned on your roadmap progress and enabled to scale your messaging.

It's important to remember that Playbacks are not just demo events at the end of a particular project phase; they are opportunities to describe the user experience in story form and align your team and stakeholders.





Create in Practice



Design Artifacts



Alignment Documents

# Create in Practice



## SANDBOX MULTIPLE POSSIBILITIES AND DOCUMENT DECISIONS

Integral to IBM Design Thinking mastery is the work that you will create to achieve governance transparency, trust, and alignment with your team. We define a number of Design Artifacts and Alignment Documents to guide you there. Design Artifacts enable the activities and exercises that will speed your team's learning and decision making. Alignment Documents are where your team documents decisions made using Design Artifacts and stays aligned.

Some useful Design Artifacts are the Stakeholder Map—a way to organize people's expectations of a release, the Empathy Map—a quick and dirty representation of a representative user, the Scenario Map—the experience a user has over time for a discrete flow of your product, the Wireframe—a low-fidelity, abstracted user interface prototype, the Technical Prototype—an implementation that explores a technical feasibility question, the Feedback Capture Grid—a simple, systematic form for capturing output of evaluative research, and the Story Map—a visual prioritization of the user stories and epics for your to-be scenarios. In IBM Design Thinking, key Alignment Documents are the Release Blueprint, User Interface Specification (UI Spec), and Backlog.

Sometimes the reality of the relationship between Design Artifacts and Alignment Documents is a little fuzzy. It's useful to think about Design Artifacts as the sandbox for Alignment Documents. When you



Create in Practice



Design  
Artifacts



Alignment  
Documents

use design thinking methods to problem solve with your team, you will diverge, remix, and converge many times. As collaborative and peer-reviewable work, Design Artifacts engage your entire team in answering critical open questions about your market direction, user needs, and technical implementation challenges. Their purpose is to get you to answers on key questions.

Don't confuse anything with the Artifact designation with a deliverable. Artifacts might yield some reuse, but typically you consider them throwaways with a "one and done" level of investment. One great way to avoid getting too attached to a particular solution is to generate multiple alternatives.

As your team uses design thinking to converge on solutions, use Alignment Documents as a way to share the decisions. In the Release Blueprint, document the results of Stakeholder Map exercises in Sponsors, Empathy Map exercises in personas, and Scenario Maps as scenarios. In the UI Spec, document converged upon Wireframes. In the Backlog, document the results of your Story Map exercises. As evaluative artifacts, you can link Technical Prototypes and Feedback Capture Grids to the Release Blueprint.

Also Alignment Documents, Playback Kit will help to ground your aligning milestone meetings in IBM Design Thinking best practices.

See the Create and Ask links on the right side of the following pages for more detailed how-to help.

Create in  
PracticeDesign  
ArtifactsAlignment  
Documents

- Survival Kit
- Stakeholder Map
- Empathy Map
- Scenario Map
- Wireframe
- Tech. Prototype
- Feedback Grid
- Story Map

# Survival Kit



The Survival Kit is a set of tools that put the user at the center of your project. Each worksheet can be used in isolation or as part of a broader set of activities with your team and Sponsor Users. These tools help you establish the IBM Design Thinking framework, understand your users' problems and motivations, explore new concepts, prototype designs, and evaluate with stakeholders. Implemented successfully, this kit will help you produce experiences that engage, enable, and delight.

Remember, this is not a cookbook or a set of recipes. Nor is it a process or methodology. It's a set of recommended practices that will help you think orthogonally and move beyond feature-centric delivery.

## Create

Survival  
Kit[Survival Kit - download](#)

## Ask

[When do we use Design Artifacts?](#)

Create in  
PracticeDesign  
ArtifactsAlignment  
Documents

- [Survival Kit](#)
- [Stakeholder Map](#)
- [Empathy Map](#)
- [Scenario Map](#)
- [Wireframe](#)
- [Tech. Prototype](#)
- [Feedback Grid](#)
- [Story Map](#)

# Stakeholder Map



Stakeholder Maps organize people's expectations of a project. They capture everyone with a stake in or influence on the outcome of the project, and include key information about each person and the relationships among them.

Use this artifact when starting a project or when the team is feeling pulled in too many different directions by varying stakeholder points of view. Stakeholder Maps are especially helpful for uncovering the "real" success criteria for the project as well as any misalignments that might cause problems for the team.

**How-To:** As a team, identify all the people inside and outside your immediate team with a stake in the project. For each person, you should identify several things: their name and role, a quote representing their major motivation in their role, and/or a statement representing their assumption about the goal of this project. Next, cluster stakeholders and label groupings. Then, draw lines connecting groups and individual stakeholders. On each line, describe the relationship using action language (i.e. a verb).

Design leads Stakeholder Maps creation in collaboration with Product Management and Engineering.

## Create



Survival Kit - Stakeholder Map

## Ask

When do we use Design Artifacts?

What is the difference between a Sponsor User and a stakeholder?



Create in Practice



Alignment Documents



- [Survival Kit](#)
- [Stakeholder Map](#)
- [Empathy Map](#)
- [Scenario Map](#)
- [Wireframe](#)
- [Tech. Prototype](#)
- [Feedback Grid](#)
- [Story Map](#)

# Empathy Map



Empathy Maps are quick and dirty personas. Generally low-fidelity works in progress, they capture and articulate the many facets of a representative user as currently understood and viewed by the team.

Use this artifact when your team needs to think systematically about users with all of their attributes and dimensions beyond just their job role. You can use Empathy Maps at the beginning of a release to capture the current state of knowledge and uncover assumptions that can be tested and validated through research. You can also use them to capture and organize data gathered during user research. Empathy Maps provide a structure for talking about users when there isn't much previous structure available.

**How-To:** Draw the diagram as pictured in the Survival Kit. Put an illustration of the person in the center circle. Fill in each section with what the user thinks (expectations and reactions), sees (environment and interface), says (quotes), does (actions), feels (values and responses), and hears (instructions or feedback) during the experience. At the bottom, list pains (frustrations and obstacles) and gains (goals and strategies).

Design leads Empathy Maps creation in collaboration with Product Management and Engineering.

## Create



Survival Kit - Empathy Map

## Ask

When do we use Design Artifacts?



Create in Practice

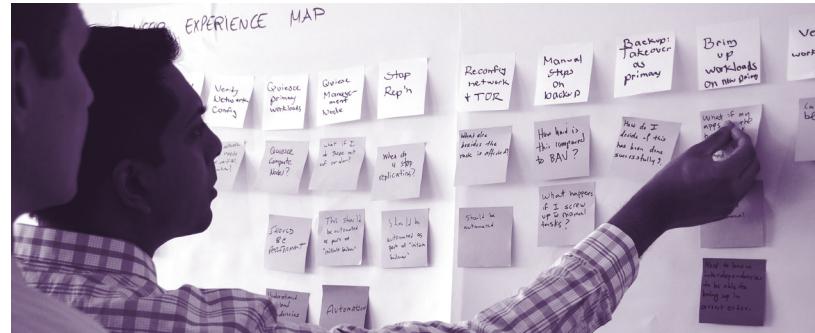


- [Survival Kit](#)
- [Stakeholder Map](#)
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- [Feedback Grid](#)
- [Story Map](#)



Alignment Documents

# Scenario Map



Scenarios Maps represent the steps in a discrete user workflow. They capture the current as-is user experience and the future to-be redesigned user experience and serve as a fundamental organizing tool for your designs, epics and user stories.

Use this artifact to brainstorm questions, thoughts, and design ideas when your team needs to think systematically about your product experience, especially as it unfolds over time.

**How-To:** Choose a user type or persona and make a row of boxes that represents the steps in a discrete flow or path in the user's experience. This will likely include steps that don't involve your product or service. Beneath each step, create a column to capture details associated with that step or point in time. Include key person-centered characteristics from your Empathy Map (e.g. what is the person thinking, feeling, doing, etc.). At the bottom of each column, capture questions, thoughts, opportunities, and design ideas. Initially, you will end up with many of these maps (i.e. 4-15) and will need to synthesize them in the Release Blueprint.

Design leads Scenario Maps creation in collaboration with Product Management and Engineering.

## Create



Survival Kit - Scenario Map



Release Blueprint

## Ask

When do we use Design Artifacts?

How do we get from Hills to scenarios to epics and user stories?



Create in Practice

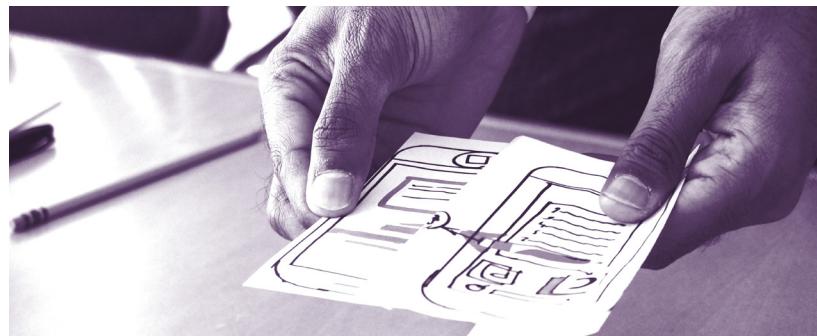


- [Survival Kit](#)
- [Stakeholder Map](#)
- [Empathy Map](#)
- [Scenario Map](#)
- [Wireframe](#)
- [Tech. Prototype](#)
- [Feedback Grid](#)
- [Story Map](#)



Alignment Documents

# Wireframe



Wireframes prototype your user interface visually. While wireframes come in all styles and levels of detail, it's best to stay low-fidelity for as long as possible to explore many different variations and to make changes easily. Don't confuse wireframes with flow diagrams. You can create wireframes top-down by filling in your screen real estate and bottom-up by piecing elements together.

Use this artifact when the team needs to explore many interface ideas rapidly by making them just tangible enough to evaluate within the team or with real users. When a team's design conversation starts to feel like it's stuck or going in circles, start wireframing.

**How-To:** Start with low-fidelity sketches and diverge before filling in the details. Use a whiteboard or other shared team space to show your sketches and to encourage participation and feedback from your team.

Design leads Wireframe creation in collaboration with Product Management and Engineering.

## Create



Survival Kit - Wireframe

## Ask

When do we use Design Artifacts?



Create in Practice



Alignment Documents



Design Artifacts

Survival Kit

Stakeholder Map

Empathy Map

Scenario Map

Wireframe

Tech. Prototype

Feedback Grid

Story Map

# Technical Prototype

```

6 PSD.IntroButton.on("click", function() {
7   window.open("https://vimeo.com/66300587", "new")
8 })
9
10
11 start = function() {
12
13   // Fade in the intro view
14   PSD.IntroView.animate({
15     properties: {opacity:1},
16     time: 100
17   })
18
19   // Make the logo appear
20   utils.delay(500, function() {
21     PSD.Logo.scale = .5
22     PSD.Logo.animate({
23       properties: {opacity:1, scale:1},
24       curve: "spring(1500,30,2000)"
25     })
26   })
27 }

```



Ask

When do we use Design Artifacts?

Technical prototypes answer key implementation questions about technical directions to deliver a user story, such as its feasibility, relative effort, or architecture.

Use this artifact to understand the trade-offs of implementing one user story over another, or the different experiences that might result from alternate implementation approaches. When you have open questions as to how, or whether a user story could be implemented (and its level of difficulty), a prototype can help you move toward decisions and select a path forward confident that the technical options are reasonably understood.

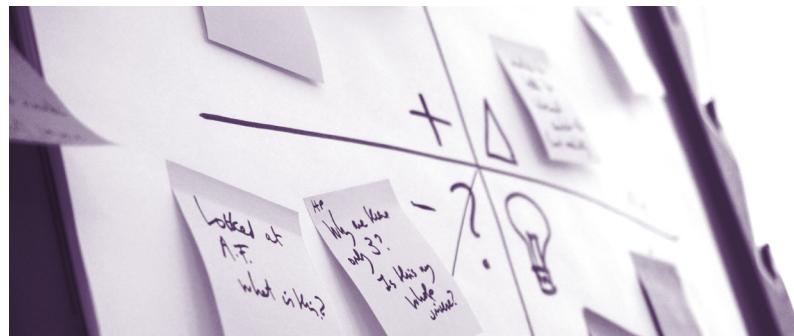
**How-To:** Your Technical Prototype should focus on answering the key open questions leading to Playback Zero. Try not to confuse prototyping with product coding. While it may be reasonable in some cases for prototypes to evolve into production code, the transition from prototype to production should be made very consciously and, by default, avoided.

Engineers with deep knowledge of available implementation technologies should lead the development of Technical Prototypes. To focus on the right questions, you should plan prototypes in collaboration with Product Managers and Designers and feed the results back into the overall design work.



- [Survival Kit](#)
- [Stakeholder Map](#)
- [Empathy Map](#)
- [Scenario Map](#)
- [Wireframe](#)
- [Tech. Prototype](#)
- [Feedback Grid](#)
- [Story Map](#)

# Feedback Capture Grid



Feedback Capture Grids allow the team to collect pros, cons, questions, and ideas from users simply and systematically. They capture the output of evaluative research or any feedback on product design.

Use this artifact when your team needs to unpack data from evaluations of your designs and ideas. The Feedback Capture Grid is especially helpful for coordinating multiple parallel activities in short time frames; it becomes the one source of truth or progress.

**How-To:** Make a 2x2 grid. Designate each quadrant for capturing specific kinds of feedback from users, including: things that are working, specific things that need to be changed, questions raised, and ideas for improvement. For each discrete piece of feedback, make a separate note and place it in the appropriate quadrant. It can be especially helpful to use different colors to indicate higher/lower priority or which team member is responsible for each item (e.g. Kim is in charge of the orange notes).

Depending on the type of feedback captured, exercises can be led by PLM, Design, or Engineering.

## Create



[Survival Kit - Feedback Capture Grid](#)

## Ask

[When do we use Design Artifacts?](#)



Create in Practice



Design  
Artifacts



# Survival Kit

## Stakeholder Map

## Empathy Map

## Scenario Map

## Wireframe

# Tech. Prototype

## Feedback Grid

## Story Map



Story Maps prioritize user stories for your project optimizing for the value delivered to users. Since they visually represent your ranked Backlog, they help you explore prioritization trade-offs such as whether to trim user stories from a number of epics, or alternatively to remove a whole epic or Hill from the release to preserve the integrity of other more important epics.

Use this artifact to help capture, organize, and prioritize the user stories and epics for your to-be scenarios. During release planning, explore how to rank your Backlog with an eye to impact on the Hills and the user experience.

**How-To:** Create your Story Map in a grid with a note for each Hill displayed horizontally. Immediately below each Hill, identify the associated epics on the second row. Below the note for each epic, identify all the user stories needed to complete the epic. Arrange the user stories from most important (top) to least important. Mark a line representing your next release, with user stories and even whole epics or entire Hills below or to the right of the line.

The PLM or Product Owner has final authority on the rankings and Engineering sizes the user stories for containment.

Create

## Backlog

Ask

## When do we use Design Artifacts?

## How do we plan Agile iterations?

## What is the Minimum Viable Product (MVP) line?



Create in Practice



Design Artifacts



[Release Blueprint](#)  
[Playback Kit](#)  
[UI Spec](#)  
[Backlog](#)

# Release Blueprint

The Release Blueprint is a wiki documenting a project's progress from Hills to user stories. It also contains strategic thinking behind the Hills and links to personas and design documents. You should use it to maintain cross-functional alignment around the overall direction and priorities of the release as a single, collaborative source of truth for a specific release. Using the language of the market and users, it also interlocks directly into the Product Management Operating Model (PMOM).

Minimally, this Alignment Document starts with a draft of the Hills and personas around the time of the Hills Playback and becomes robust and stable (but still alive) with prioritized scenarios and links to Design Artifacts by Playback Zero.

For PMOM, the content directly dovetails into Decision Checkpoint Content (DCP). This is especially true for the Offering Business Plan DCP, which requires information on the offering highlights, the schedule of the release in terms of the offering plan, business dynamics, client needs, the business problems to solve, the competitive situation and the broader market needs.

The Release Blueprint also drives the contents and prioritization of the Backlog. Engineering leads should refer to the Release Blueprint as the reference for the high-level scope of the project for initial containment discussions, alongside Design Artifacts.

The Release Blueprint evolves constantly throughout the entire release. As a document that tracks the temporal dimension of the release, update it on a regular basis.

Maintained by PLM, all disciplines contribute and discuss the content so everyone on the team should have access. Everyone should be in the habit of checking the Release Blueprint to understand the context of their work.

## Create

Design Artifacts

Design Artifacts

Backlog

Backlog

Release Blueprint Wiki

Release Blueprint wiki

## Ask

How complete does the Release Blueprint need to be by when?

How does PMOM relate to IBM Design Thinking?

Create in  
PracticeDesign  
ArtifactsAlignment  
Documents

- [Release Blueprint](#)
- [Playback Kit](#)
- [UI Spec](#)
- [Backlog](#)

# Playback Kit

The best Playbacks are when the team takes ownership of the story they want to tell and really engages the audience. We've seen some amazing examples when teams tell very personal stories about design thinking and how it drives a project. With a well crafted Playback, your audience will naturally pay attention to your content and give feedback.

To help you get there, we provide a kit to download at the right. In the kit you will find actionable guides for the Hills Playback, Playback Zero, and Client Playback as well as a presentation template in both PowerPoint and Keynote formats. Since IBM Design Thinking isn't about form filling, you should use the presentation Slide Master to customize and edit your deck to be specific to your project and its stories.

## Remember the following guidelines:

- Keep it simple, clean, and clear.
- Be consistent with layouts, type sizes and diagrams.
- Slides must have unity, use the template rules (font, size, color).
- Display data clearly—use one main idea per slide.
- Distinguish levels of hierarchy in your slides.

## Create

[Playback Kit - download](#)

## Ask

[How do we get to the Hills Playback?](#)[How do we get to Playback Zero?](#)[How do we use the Client Playback Kit?](#)



Create in Practice



Design Artifacts



Alignment Documents

- [Release Blueprint](#)
- [Playback Kit](#)
- [UI Spec](#)
- [Backlog](#)

# UI Spec

Create a User Interface Specification (UI Spec) when you need to specify the visual or interaction design for a UI. A concise, well crafted, UI Spec is key to aligning everyone around the intended user experience.

In a complex project, several UI Specs may be produced for different parts of the UI. UI Specs take many forms. Many UIs can be specified by providing a set of annotated Wireframes or mockups that communicate the salient features of the UI and related system behaviors. When complex behavior is involved, a more detailed written UI Spec may be helpful or even essential. When a novel user interaction model is involved, a prototype of the intended interaction behavior, look, and feel may be needed.

A UI Spec is usually considered an Alignment Document that evolves with the design. An initial draft of a UI Spec might consist of a few low-fidelity Wireframes, evolving to include more information as decisions take shape and the team needs more detail on the specific design to be implemented.

UI Specs can be both extremely valuable in guiding development work and quite painful to develop and maintain. It's therefore important to figure out as a team what information is truly needed in the UI Spec. It's often helpful to capture shared content such as UI guidelines in a central location to avoid repetition. Before and during coding, Designers and Engineers use the UI Spec to iterate on the details of the design, including capturing and resolving key open issues. In some forms of Agile practice, UI Specs are considered part of the Acceptance Criteria for a coding iteration.

Designers are the primary authors of UI Specs. Product Managers and Engineers should review UI Specs to ensure alignment on the design. Information Developers and Testers also rely heavily on the UI Spec to plan and do their work, since it frequently offers the most concrete and complete record of the intended outcome.

Create



Wireframe



Create in Practice



Design Artifacts



Release Blueprint  
Playback Kit  
UI Spec  
Backlog

# Backlog

Use a prioritized Backlog to plan iterative implementation of user stories and ensure that the results of your development effort deliver the Minimum Viable Product (MVP) of your Hills and have integrity from a user's perspective.

The Backlog is a commonly used tool for documenting and prioritizing (ranking) the user stories that you've collected as candidates for development in the current release period. The development team decides which user stories to implement next based on which have been ranked the highest in the Backlog. User stories are organized into functional groupings called epics to help facilitate higher-level planning.

All members of the development team across PLM, Design, and Engineering have a big stake in the Backlog. Everyone on the team should be involved in creating and refining the user stories so that they represent the collective wisdom of the team and can be sized with confidence. Ultimately, the product owner (the Product Management Lead for the project or a delegate) has final authority over the Backlog content and priority order.

In IBM Design Thinking, a special emphasis is placed on grooming the Backlog with a view to delivering those stories with the highest value first while keeping the integrity of all the user stories required to deliver the to-be scenarios at the heart of each Hill. When we talk about an MVP line, we're not using the classic definition because we are applying the concept to each Hill independently. Generally, if a Hill's MVP is not being met it indicates that the Hill was under-sscoped. At which point, the leadership team has to have a conversation about reallocating resources and potentially sacrificing one Hill in order to achieve another. This is why it's important that the Backlog be organized to ensure that the essential stories associated with each Hill's to-be scenarios are prioritized higher than those that are not essential.

## Ask

How do we get from Hills to scenarios to epics and user stories?

What is the Minimum Viable Product (MVP) line?

How do we plan Agile iterations?



Create in  
Practice



Design  
Artifacts



Alignment  
Documents

- [Release Blueprint](#)
- [Playback Kit](#)
- [UI Spec](#)
- [Backlog](#)

As the team converges on its to-be scenarios, work can get underway to document the underlying user stories needed to deliver each to-be scenario. It's helpful to have made substantial progress on this task by Playback Zero, in order to minimize the extra time needed to complete writing user stories before coding begins. Estimation, prioritization, and iteration planning are driven out of the Backlog.



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

# Actionable Answers



## ASK QUESTIONS AND TAKE ACTIONS

Since we started rolling out IBM Design Thinking in January 2013, we've been working directly with practitioners in our Signature and Hallmark Projects and at our Designcamp. During this time, we've heard a lot of questions. Here, we've compiled a list of the questions that we hear most frequently and have formulated actionable answers for you so you can keep moving forward with your work whenever you need to.

Of course, if you don't see something explicitly asked and answered here, feel free to find us in the IBM Design Thinking Community and ask more questions through the [Forum](#).



## What makes a good Hill?

### A good Hill:

- articulates clear, direct, and easily understandable value.
- identifies the users or class of users who will consume the value.
- describes an outcome in language that is user-centric and implementation-agnostic.
- formulates a testable outcome achievable in a defined timeframe (one or more releases or a period of continuous delivery).

These characteristics are important, because they align the team clearly around the same mission and bind together the underlying stories into a single whole. While the syntactic structure of a Hill can vary, it is often expressed through a Who, What, and Wow form, e.g. "A business user can configure and run a what-if analysis over gigabytes of data in less than 5 minutes."

### Ask

How are Hills different from a roadmap?

How do we get to the Hills Playback?

What Hills do we include in Playback Zero?

What do we do if our Hills are very complex?

What do we put in Technical Foundation?

How many scenarios belong in a Hill?

How do we get from Hills to scenarios to epics and user stories?



Deliver a custom Connections community template to allow agile teams to collaborate on client projects



A GMU-based sales leader can assemble an agile response team from across IBM in 24 hours without management involvement

(Deliver by November 2013)

Who    What    Wow



## How are Hills different from a roadmap?

Hills define the objectives for the upcoming release. As concrete and actionable guidance for aligning the team, the Hills drive the design and implementation work.

The roadmap—which surfaces as part of the Client Playback deck—includes the Hills, but additionally provides the market context and the longer-term vision for the product. The guidance beyond the closest release is usually a less specific intentional statement, laying out the general direction but not detailing the specific Hills.

### Ask

[What makes a good Hill?](#)

[How do we get to the Hills Playback?](#)

[What Hills do we include in Playback Zero?](#)

[How do we get from Hills to scenarios to epics and user stories?](#)

[How do we use the Client Playback Kit?](#)



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

## What do we do if our Hills are very complex?

A Hill can be complex in two different ways:

1. The Hill is large in scope, i.e. it simply provides a broad set of user experiences, perhaps involving many different types of users in multiple different contexts.
2. The Hill has (perhaps bi-directional) dependencies on Hills of other products, which is particularly common in product portfolios.

There are two main ways to manage complex Hills. The first one is to create Sub-Hills to keep the number of scenarios at a reasonable level. If you do so, it's important that each Sub-Hill is a proper, cohesive Hill, and not an artificial bucket created just to contain scenarios. The scenarios within a Hill should be strongly related and collectively define the Hill. The other complementary approach to managing complex Hills is to stagger them over several releases, i.e. make them multi-release Hills. Sometimes the need for this comes from the development resources available, but sometimes it may be necessary more due to the collaboration and alignment required when products depend on each other.

When you stagger delivery of a Hill over multiple releases, it's important to make each delivery self-contained and of value to the user. There's absolutely no point in delivering something in the product which doesn't enable a complete user experience of value to a particular user. While you might be building up to the final, complete experience over releases, each stepping stone has to work independently. As an analogy, if your final experience is coffee drinking where

- A coffee drinker can get the cup of coffee she loves on the go in five minutes.

Ask

How many scenarios belong in a Hill?

How do we get from Hills to scenarios to epics and user stories?



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

Then you could break this down so that

- She can get a great cup of black coffee, one roast fits all (the first release)
- She can select a specific roast, but has to get her specialty items like steamed milk, on the side (the second release)
- She can press a single button and get a speciality drink like a cappuccino (the third release)

Actionable  
AnswersCore  
PracticesDesign  
Thinking

Collaboration

## How many scenarios belong in a Hill?

Normally a Hill contains three to ten scenarios, but where you land in that range depends on the complexity of the Hill. There may be many distinct usage scenarios through which users derive value and there may also be several personas behind those usage scenarios. The practical question is which scenarios need to be explicitly worked out and documented to adequately understand the context of use. In some cases, you may find there is one “killer” scenario that conveys the main breakthrough represented by a Hill. In other cases, you may need to document multiple scenarios to address different aspects and concerns from potentially several types of users.

For example, if the Hill were about a Business User being able to configure and run What-If Analysis over data from multiple sources, you would probably have at least two to three scenarios for the various ways the Business User would perform the analysis. And then maybe you would have one scenario for a Developer who is required to set up data integration, and then possibly a scenario for a System Administrator who optimizes the system for good performance.

Ask

What makes a good Hill?

What do we do if our Hills are very complex?

How do we get from Hills to scenarios to epics and user stories?



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

## What do we put in Technical Foundation?

Technical Foundation is not a Hill, but rather an investment made towards development work only marginally impacting the end user experience and having a very wide target. Technical Foundation supports either cross-cutting quality, serviceability, and consumability requirements (including bug fixing, accessibility, globalization, secure engineering, performance, updates to platform support, etc.), or “internal” technical objectives that will set the project up for greater success down the road but is not delivering user-derivable value in the project timeframe (such as refactoring, replatforming, or new engines—things required to introduce new capability beyond the current release period or to lower the internal cost/increase the speed of development). The main point is that your team should explicitly declare what these items are and identify the percentage resource allocation associated with the overall bucket.

Fundamentally, the goal of Technical Foundation is to make visible the tension between categories of work in the aggregate versus user-derivable value in a given release cycle. Consequently, Technical Foundation should not require major investments from Design, is normally led by Engineering, and includes a lead from Product Management for prioritization and triage.

Ask

What makes a good Hill?

Actionable  
AnswersCore  
PracticesDesign  
Thinking

Collaboration

## How do we get from Hills to scenarios to epics and user stories?

The basic principle is that Hills decompose into a set of scenarios, which in turn map to epics that are containers for (codable) user stories. Ideally, the vast majority of user stories are also derived in that fashion, i.e. top-down starting from the user experience.

For less complex releases, you might be able to have a 1:1 mapping between scenarios and epics, i.e. the epics are the same as the scenarios. In many cases, however, you might have some set(s) of user stories that support multiple scenarios, and you might find that such stories are more naturally grouped into epics that also link back to several scenarios. This can often be the case for basic or backend functionality such as authentication, settings, data access, etc. In contrast, the bulk of the user stories needed to implement the core experience of a Hill would normally be contained in an epic that maps straight to a single scenario.

While there's flexibility in how you structure your Hills, scenarios, epics, and user stories, as well as how you link them in your tools, keep in mind the following end goals:

- You should be able to trace down from a Hill and arrive at a list of all the stories that are in support of that Hill, and conversely, find the scenario(s) and Hill(s) starting from a user story. In fact, and by definition of Hills, if a story can't be traced back to a Hill, it's not part of the release.
- While epics are convenient containers in Rational Team Concert (RTC) (or the similar system you're using), Playbacks are always done for scenarios, never for stories or epics (should they differ from scenarios). In other words, epics can be useful for the Engineering team during iterations, but they are not what you use for cross-functional alignment. They are not part of the Release Blueprint and they are not the basis for Playbacks.

Ask

What makes a good Hill?

What do we do if our Hills are very complex?

Actionable  
AnswersCore  
PracticesDesign  
Thinking

Collaboration

## What's the difference between a Sponsor User and a stakeholder?

Sponsor Users represent your target users, can shed light on many aspects of the users' problem, and can help you arrive at a better solution. Stakeholders give you feedback and support on the business and go-to-market aspects of your offering.

Sponsor Users are select clients who work alongside your team and with whom you have legal agreements. Within the business domain that they represent, they embody the actual problem being solved and can validate the suitability and quality of your solution. You will engage with them closely during the release cycle to get feedback and to guide your release definition, design and implementation work. Leading up to the Hills Playback, you will engage with your Sponsor User as part of market and user research to inform Hill definitions. Leading up to Playback Zero you will ask your Sponsor User for design feedback on prototypes.

Stakeholders refer to broader sets of people and groups—internal and external—who have a vested interest or influence over your product and its evolution. Typical internal stakeholders include the up-line chain of executives, sales, marketing and support leaders, or business owners for products you integrate with or depend upon. Depending on your situation, external stakeholders might include resellers and implementation partners whose business depends on the direction and evolution of your offering. You interact with stakeholders to align and get buy-in for the direction you're taking with your offering. While you might not engage with stakeholders as closely and frequently as you do with Sponsor Users, it's important to remember their interest, perspective, and expectations of your product and the upcoming releases.

### Ask

[Where do we find Sponsor Users?](#)

[What makes a good Sponsor User?](#)

[What is the role of Sponsor Users in Playbacks?](#)

[What is the relation between Sponsor Users and user research?](#)

[How do we use the Client Playback Kit?](#)



## Where do we find Sponsor Users?

Creating relationships with potential Sponsor Users is a continuous activity. It's useful to maintain a "pipeline" of candidates from a variety of sources such as: external clients, prospects and partners, IBM internal users (GTS and GBS in particular), and IBM tech sales and services teams.

Externally, candidates will often surface during product briefings and roadmap presentations. Try to nurture these relationships over time. Somebody who isn't a fit for one of your current Hills might be ideal for a future one.

Internally, Global Technology Services (GTS) is a very large user of Software Group (SWG) products, and in many cases may be "pushing the envelope" with your particular product. GTS can be a good source of Sponsor Users because they combine early adoption and advanced usage with the ease of internal collaboration (no need for legal agreements). You can email 'GTS Brand Synergy/Austin/IBM' to find out who might be using your products and potentially engage them as a Sponsor User. Practitioners in GTS are normally allocated to customer engagements, so just like with clients, plan for efficient engagement and be up front and clear with what's expected from them in terms of time and deliverables.

Tech sales and services teams are often very close to the need of clients and partners so they can act as informed proxies even if they are not end users with the business problem you are addressing. These field professionals can give feedback on how well your solution will demo, resonate with new prospects, and work for partners. Sponsor Users from the field can help to validate your solution as well as its go-to-market strategy.

When recruiting, consider that Sponsor Users will need to commit roughly 10 to 50 hours of their time for a release cycle.

### Ask

What is the difference between a Sponsor User and a stakeholder?

What makes a good Sponsor User?

What is the role of Sponsor Users in Playbacks?

What is the relation between Sponsor Users and user research?



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

## What makes a good Sponsor User?

Users are critical in your development process because they clarify the problems that you're trying to address in your Hills. They also validate the solution you're designing and implementing while keeping you focused on the user experience during development.

A good Sponsor User should know the business domain you're working in, have the actual problem that you're trying to solve, and be representative of other users of your product who have similar problems. If this sounds daunting, remember that you are not looking for a single Sponsor User who's the ideal representative of your entire client base. That person is unlikely to exist. Instead, you're typically looking for one or two Sponsor Users per Hill that collectively speak for the users impacted by the user experiences delivered. A Sponsor User who's perfect for one Hill in one release, might not be a suitable choice for another release.

There are times when you might consider being more aggressive and engage more Sponsor Users than normal. One reason would be if you're targeting a new persona to expand the footprint of your product to deliver an experience to a new type of user. While not all of them can likely be present at the same time and drive Playbacks, having additional reviewers with unique perspectives will reduce the risk of delivering an overly narrow solution.

Sponsor Users should also be ready and able to engage with your entire team at the right points in the project. They should communicate well through e-mail, phone, and online meetings; prioritize their role sufficiently to be responsive to your requests; and be willing to take a mid- to long-term view of your product. While Sponsor Users might in part sign up because they have an immediate need for the capability you're developing, the discussion and feedback required will often go beyond the narrow and tactical.

### Ask

[What is the difference between a Sponsor User and a stakeholder?](#)

[Where do we find Sponsor Users?](#)

[What is the role of Sponsor Users in Playbacks?](#)

[What is the relation between Sponsor Users and user research?](#)



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

## What is the role of Sponsor Users in Playbacks?

IBM Design Thinking does not recommend that Sponsor Users run storyboard presentations in Playback Zero. Up to and including Playback Zero, the project is in a formative stage and Sponsor Users are better placed to provide insight and feedback only. In Delivery Playbacks, it may (or may not, depending on the circumstances) be appropriate to have the Sponsor User(s) actually give the demo.

The general goal is to ensure that the authentic voices of the Sponsor Users are heard at these major milestones. It can be also very powerful to hear the confirmation that the team is getting things right directly from a Sponsor User, as the project is taking shape. If you keep the number of Sponsor Users lower, it will be easier to pull the Playbacks together and involve them appropriately.

### Ask

What is the difference between a Sponsor User and a stakeholder?

What makes a good Sponsor User?

Where do we find Sponsor Users?

What is the relation between Sponsor Users and user research?



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

## What is the relation between Sponsor Users and user research?

Sponsor Users are not the only means to do user research, which would typically need to touch a lot more people. Rather, Sponsor Users are carefully selected clients who work with the team and with whom you have a special NDA agreement. You should recruit Sponsor Users as soon as your team has agreed on the Hills. As you engage them on a regular basis throughout the development cycle, your relationship will deepen, and their feedback will give you direct insight into the problems you need to solve and informed feedback on your evolving solution.

Ask

What is the difference between a Sponsor User and a stakeholder?

What makes a good Sponsor User?

Where do we find Sponsor Users?

What is the role of Sponsor Users in Playbacks?

Actionable  
AnswersCore  
PracticesDesign  
Thinking

Collaboration

## How do we get to the Hills Playback?

The Hills Playback is your opportunity to communicate your Hills and release timeline. In the work leading up to this Playback milestone, you will focus on identifying market opportunities and drafting Hills.

### **Focus on the market outcomes:**

- The Product Management team should be able to articulate the market opportunity that the release will address and specific intent vs. the competition.
- The Hills should describe the desirable market outcomes with user-centric language.
- The Hill plus Technical Foundation should have clear resource allocations totaling to 100% for the project cycle.
- The Hills should include Sub-Hills, where appropriate.

### **Socialize the Hills to get buy-in:**

- To socialize your Hills, you can and should have a number of pre-Hills Playback meetings. Involve the team in writing the Hills. Workshopping is a common way to get team participation and early buy-in.
- Don't think of the Hills Playback as a monolithic milestone; like any good milestone, you should consider the activities leading up to it that will spell success.
- Remember that the Hills Playback is useful as an early intervention to surface misalignment. If you find yourself holding a Hills Playback where you don't have clear buy-in, then regroup, recraft and re-present the Hills in a new Hills Playback.

Create

Release Blueprint

Release Blueprint

Ask

What makes a good Hill?

What do we put in Technical Foundation?

Who attends the Hills Playback?

How complete does the Release Blueprint need to be by when?



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

- If you didn't get clear buy-in, then consider that you may have not done adequate pre-work in socializing the Hills with your team or your stakeholders.

**Setup your team to be successful:**

- Have team discussions about barriers to taking the Hills.
- Have the right people metrics (team composition, leadership and ratios as recorded on your project dashboard).
- Onboard your Sponsor User(s).
- Identify and onboard your stakeholders.
- Onboard your team onto the Release Blueprint.

**Sketch out your timeline:**

- Determine the overall release cadence.
- Determine major milestones timing. The milestones are: Hills Playback, Playback Zero, and Delivery Playbacks.
- Include "hard" milestones like conference deadlines, marketing PR releases.



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

### Prepare:

- Even if you don't feel quite ready, set a milestone date and invite the team and key stakeholders.
- Use the IBM Design Thinking Hills Playback Kit to start building your deck with the pieces you know.
- Dry-run practice, or "prototype" your Hills Playback, and "play it back" to make sure it is what you need it to be.
- Ask people not as familiar with the content for feedback on the deck to test its standalone understandability.
- As a best practice, record the Playback for those who cannot attend.

### Know your desired outcomes for the Playback:

- Focused, energized team working in a common direction as expressed by the Hills.
- Communicated business value of the release as a function of the Hills.
- Confirmed buy-in of the Hills.
- Communicated next steps for getting to Playback Zero.



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

## Who attends the Hills Playback?

The key Hills Playback participants are the cross-functional leaders of your project (for the releases in hand), key up-line executive stakeholders (essential), and the larger team (at the discretion of the leaders as to what is appropriate). Do not plan to include Sponsor Users in the Hills Playback meeting.

Ask

What makes a good Hill?

How do we get to the Hills Playback?



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

## What Hills do we include in Playback Zero?

You should plan to include all the Hills in Playback Zero.

Ask

What makes a good Hill?

How do we get to Playback Zero?

Who attends Playback Zero?

How many scenarios belong in a Hill?

Actionable  
AnswersCore  
PracticesDesign  
Thinking

Collaboration

## How do we get to Playback Zero?

Playback Zero is your opportunity to communicate the final Hills and the storyboards that support your intended user experience. In the work leading up to this Playback milestone, you will focus on using design thinking to refine the Hills, develop to-be scenarios in support of your personas, and do just enough engineering to formulate containment statements.

### **Specifically, know your personas, their scenarios and the Hills they support:**

- The detailed personas and scenarios should be based on user research.
- The finalized Hills should be aligned with market objectives and user needs.
- The user interface should be grounded in visual research and fleshed out enough to get feedback.
- The design should provide a breakthrough experience for your target personas (relative to business as usual and/or the competition).
- The user experience should motivate and reward users.

### **Setup your team to be successful:**

- Have Sponsor Users and other users validated the mental models, information hierarchy, and interactions.
- The team should have a rough mapping of scenarios to epics and user stories and determined a MVP.
- Engineering should have done a rough sizing and determined that the MVP is containable and overall design is (optimistically) reasonable.
- The team should continue to engage in collaboration around a robust Release Blueprint.

### Create

Release  
Blueprint

Release Blueprint

### Ask

What Hills do we include in Playback Zero?

Who attends Playback Zero?

How complete does the Release Blueprint need to be by when?

When do we use Design Artifacts?

What is the Minimum Viable Product (MVP) line?



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

### Prepare:

- Ensure the design and team are ready to transition to final release planning and start of coding.
- Prepare to demonstrate a convincing scenario in support of each Hill, incorporating personas.
- Align the team across functions on the direction and scope given available time and resources.
- Invite team members and stakeholders.
- Use the IBM Design Thinking Playback Zero Kit to build your deck.
- Assign Playback roles and prepare team members and Sponsor Users to deliver the Playback.
- As a best practice, record the Playback for those who cannot attend.

### Know your desired outcomes for the Playback:

- Committed leadership team on the user-centric value propositions delivered to the market, based on the Hills.
- Confirmed buy-in of the finalized Hills.
- Aligned cross-functional direction and approximate scope.



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

## Who attends Playback Zero?

The key Playback Zero participants are the development team; key internal stakeholders such as sales, marketing, and services representatives; and Sponsor Users.

Ask

What Hills do we include in Playback Zero?

How do we get to Playback Zero?

When do we use Design Artifacts?

How complete does the Release Blueprint need to be by when?

Actionable  
AnswersCore  
PracticesDesign  
Thinking

Collaboration

## How do we prepare for Delivery Playbacks?

Delivery Playbacks are your opportunity to communicate implementation progress on the scenarios at the heart of one or more Hill. In the work leading to these Playbacks, you will focus on delivering the right scenarios to maximize the impact of the stories you want each iteration to tell. Specifically,

### **Set your team up for success:**

- Schedule Delivery Playbacks by Playback Zero with a rough idea of which scenarios will be reviewed when.
- Plan a demo that closely aligns to the scenario(s) that will be the focus of the Playback.
- Plan to tell a whole story in the highest-fidelity possible. When there are gaps in implemented code, use mockups and other design artifacts to fill the gaps. Clearly label legacy material and what is not live.
- Keep the team aligned around a ranked Backlog and an appropriately mature UI Spec.

### **Prepare:**

- Invite team members, stakeholders, and the most relevant Sponsor Users.
- Assign Playback roles and prepare team members and the most appropriate Sponsor Users to deliver the Playback.
- Prepare a deck to briefly review the vision, Hills, personas, and timeline.
- Work with Sponsor Users to demo successfully.
- As a best practice, record the Playback for those who cannot attend.

### Create


**UI Spec**

**Backlog**

### Ask

What is included in the first Delivery Playback?



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

### Know your desired outcomes:

- Cross-functional team alignment
- Stakeholder buy-in
- Feedback
- Story scaled to sales and marketing

Actionable  
AnswersCore  
PracticesDesign  
Thinking

Collaboration

## What is included in the first Delivery Playback?

Each Delivery Playback should focus on one or more Hills and the scenario(s) at the heart of each Hill. By Playback Zero, there should be a clear plan to play back specific Hills and scenarios at future Delivery Playbacks. Use a Story Map to prioritize your user stories and estimate which scenarios will be ready to demo by each Playback. The first Delivery Playback will be the first installment of this plan. Scenarios may evolve from their state at Playback Zero; learning should happen continuously as your team refines and delivers the experience.

Create



Story Map

Ask

How do we prepare for Delivery Playbacks?



## How do we use the Client Playback Kit?

The Client Playback Kit is provided by IBM Design to help you structure Client Playbacks. The purpose of the Client Playback is to scale and focus the conversations you have with clients and to improve the quality and consistency of their feedback to you. Therefore, surrounding the Client Playback you need a "program" which scales out in the field. Normally this program consists of:

- a community of select senior leaders from sales, technical sales, marketing and services, Product Line Management, Design, and Engineering.
- an initial Client Playback just after Playback Zero, where Product Management and Design educate the community on the new Client Playback deck content (the Hills and associated Design Artifacts).
- a mechanism whereby the field can request roadmap presentations.
- ideally, a log with feedback from the roadmap briefings.
- a continuous stream of updates to the Client Playback deck starting at around the time of Playback Zero and then in additional Client Playbacks whenever there are substantial, demoable changes during implementation.

### Create



Design Artifacts



Playback Kit

### Ask

How are Hills different from a roadmap?

What is the difference between a Sponsor User and a stakeholder?



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

## What's new in IBM Design Thinking?

In this update to IBM Design Thinking, we've moved to Core Practices supported by three principles to help you more easily apply the framework to delivering great user experiences. Our new timeline is lighter weight with consistently named Playback milestones and now much easier to sync with your team's current way of working. We re-aligned the NDA Deck to client facing alignment meetings called Client Playbacks. And finally, your journey is now organized around projects which can have multiple releases.

v1.0

### Building Blocks

The original Building Blocks of IBM Design Thinking included the Release Blueprint and Dashboard. The Dashboard has been sunset, and the Blueprint has been moved to a new category of Alignment Documents. The Building Blocks were not substantiated by principles or values.



Hills



Playbacks



Sponsor  
Users



Release  
Blueprint



Release  
Dashboard

v2.0

### Core Practices + Design Thinking

The new mental model combines our flavor of Design Thinking methods with three Core Practices (Hills, Sponsor Users, and Playbacks) that enable and scale the delivery of user experiences. The Core Practices each relate to a Principle and are differentiated visually by color and iconography.

Hills  
Invest for Market  
Outcomes



Sponsor Users  
Envision the User  
Experience



Understand

Explore

Evaluate

Prototype

Play

Playback  
Collaborate, Align,  
Engage!



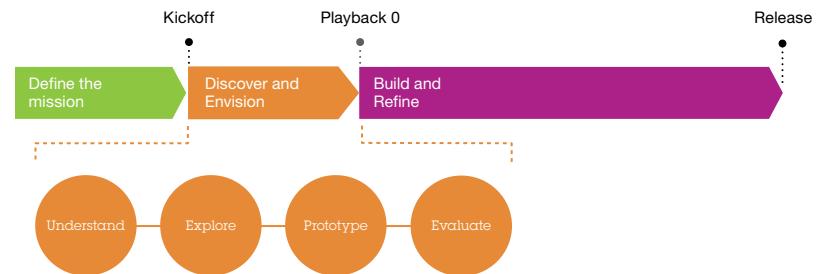
Actionable  
AnswersCore  
PracticesDesign  
Thinking

Collaboration

v1.0

### Phases + Spaces

v1.0 imposed a heavy timeline on teams, raised issues of “phase ownership,” and had a waterfall feel. Milestone names varied, making them hard to distinguish from teams’ existing milestones. It also linked design thinking methods explicitly to Discover and Envision and dictated one release per set of Hills.



v2.0

### Timeline

The new timeline consists only of milestone Playbacks (a core practice), which drive interim work and can sync with teams’ existing timelines. Playback names have changed, and Client Playbacks replace the NDA Deck. The journey is no longer marked by a “release” but a “project,” which might have multiple releases.





Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

## When do we use Design Artifacts?

Design Artifacts enable design thinking activities and exercises. The artifacts themselves are not deliverables; they are actually disposable facilitation tools to help get your team to alignment. As such, you can use them at any time during a project when your team needs to diverge, remix, and converge to solve a problem.

You will use Design Artifacts especially in the period leading up to Playback Zero as you define the Hills and develop scenarios based on your personas. But even after this point when you've moved into the development phase, you will need to continue to use Wireframes and Feedback Capture Grids. Story Maps are valuable as you move into your Playback Zero.

### Create



Design Artifacts



Survival Kit



Wireframe



Feedback Capture Grid



Story Map

### Ask

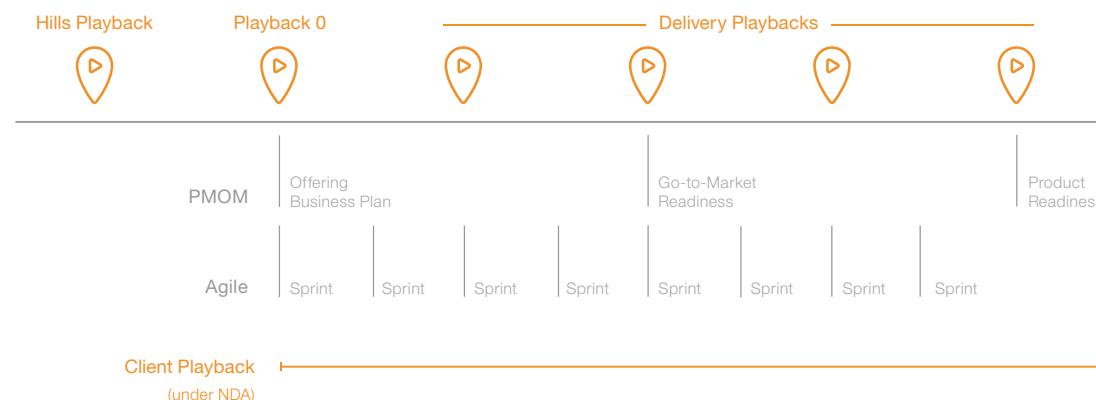
How do we get to Playback Zero?



## How does PMOM relate to IBM Design Thinking?

The Product Management Operating Model (PMOM) and IBM Design Thinking are complementary frameworks for governing a project end-to-end. They are used in conjunction and serve different purposes. IBM Design Thinking focuses on the content and user experience of a project and targets primarily Product Line Management, Design, and Engineering functions. The focus of the PMOM process is on the business objectives of the project and broader cross-functional alignment, including sales, marketing, and finance.

There are points in time where IBM Design Thinking milestones align with PMOM checkpoints (DCPs). Most prominently, the project definition as defined at Playback Zero—the Hills, their associated investment allocations, and scenarios—flows into the Offering Business Plan (OBP) DCP of PMOM, along with the supporting market and competitive analysis. Further down the project cycle, the Go-To-Market Readiness and Product Readiness DCP Content are informed by the Client Playbacks and Delivery Playbacks, respectively, and the adjustments that have occurred since Playback Zero. There's more flexibility in the timing of these checkpoints.





## How are Playbacks like sprint demos?

In scrum, an instantiation of Agile practice, teams give demos at the end of each sprint (a coding period usually lasting about two weeks). They are like Playbacks in that they are story-based. In Delivery Playbacks, you should largely focus on showing the parts of the story that have been coded.

Playbacks are different than sprint demos, however, in that they focus on end-to-end scenarios rather than a checklist of individual user stories (requirements tied to user roles). They align more stakeholders to “roll up” progress made across potentially a number of coding periods, as well as “out” to sales and marketing. Playback demos specifically tie scenarios back to the team’s Hills and personas, and when pieces are not yet implemented, Design Artifacts fill the gaps.

Create

Design Artifacts

Design Artifacts

Ask

How do we get to Playback Zero?

How do we prepare for Delivery Playbacks?

What is included in the first Delivery Playback?

How do we plan Agile iterations?



## How do we plan Agile iterations?

In scrum, an instantiation of Agile practice, teams code in iterations called sprints (a coding period typically lasting about two weeks). In this period, a team will commit to executing a number of user stories in the backlog. After Playback Zero, your Story Map can be used to roughly roadmap your iterations. Since the Story Map is a prioritized backlog of user stories, you can begin allocating stories over time.

To accurately allocate stories, your team must first size the stories. Since people are good at estimating the relative size of stories and bad at estimating the absolute size (e.g. number of hours), teams use an arbitrary unit called story points to size stories relative to each other. This can be done using an exercise like Planning Poker in which team members simultaneously estimate the size of each story, each placing a card with a number on the table from standardized decks.

The team must also know its velocity, or the rate at which it burns down story points, before allocating a number of story points (and equivalent stories) to each iteration. Because relative sizings are team-specific (and unless your team has previously worked together and knows its velocity), your first estimate of velocity will be very rough and should be reviewed after each iteration. This will affect your allocation of stories, as well as your overall MVP. After at least three iterations, you will have a much better estimate of velocity.

When major scenarios are expected to be complete, plan to hold a Delivery Playback.

### Create



Survival Kit - Planning Poker



Story Map

### Ask

How do we apply the IBM Design Thinking framework with staggered releases?

What is the Minimum Viable Product (MVP) line?

How are Playbacks like sprint demos?

How do we prepare for Delivery Playbacks?



Actionable  
Answers



Core  
Practices



Design  
Thinking



Collaboration

## How do we apply the framework with staggered releases?

While the best way to achieve a great user experience is for all team members to focus and collaborate continuously on a single project, projects sometimes need to overlap to avoid interruptions in a continuous delivery process. In the case of two overlapping projects (A and B), you would align the final release date of project A with the Playback Zero date of project B. The Hills Playback of project B would occur before the end of project A. The specific date depends on the length of your projects: Playback Zero should occur about a fifth of the way through the project.

The challenge with staggered projects is that in each project you want your engineering team involved before Playback Zero and your design team involved after Playback Zero. This is especially true for the team leadership, a precious resource. Be careful not to silo your teams or spread any individuals too thin. If possible, consider designating different PLM, Design, and Engineering leads to each project so your leads are not spread across multiple projects.

Ask

[How do we plan Agile iterations?](#)

[What is the Minimum Viable Product \(MVP\) line?](#)

[How are Playbacks like sprint demos?](#)

[How do we prepare for Delivery Playbacks?](#)



## What is the Minimum Viable Product (MVP) line?

In IBM Design Thinking, the MVP line shows which user stories on your Story Map are mandatory for the Hill (those above the line) and which are optional for the Hill to still be viable. In this way, you can explicitly drive a particular user experience instead of solely focusing on making components work together or checking off a list of requirements or features.

Remember that a Story Map is a grid with a note for each Hill displayed horizontally and next a row of associated epics placed under each Hill. Below each epic is a column of supporting, prioritized user stories with the most important ones at the top. By drawing a physical line on the Story Map, you are saying that the stories above the line are mandatory, “must have” components for the scenario to work and deliver the required user experience. Below the line are the stories that would enhance the offering by improving the user experience, but that are not strictly necessary to release the Hill to market. Obviously, the number of mandatory stories can vary greatly by epic.

The MVP line introduces flexibility in the development schedule that will keep you true to the user experience. For example, if some user stories within a scenario take longer than expected, there are other, non-mandatory stories within that scenario that can be postponed. In the case that mandatory, above-the-line, stories are hard to contain, below-the-line stories from other scenarios can be delayed. Triage at this level can be effectively done by the Hill leadership team, or if necessary be escalated to product leaders for cross-Hill adjustments.

### Create



#### Story Map

### Ask

[How do we plan Agile iterations?](#)

[How do we get from Hills to scenarios to epics and user stories?](#)

[How do we apply the IBM Design Thinking framework with staggered releases?](#)



## How complete does the Release Blueprint need to be by when?

The Release Blueprint (RB) is a living Alignment Document that you should use to facilitate collaboration and alignment across team functions. As such, your team should modify and refine the RB's content regularly. By the Hills Playback, you will minimally want to have a reasonable draft of your Hills documented, links to personas and information about the market problems that your Hills will serve. By the time of Playback Zero, you should add a finalized version of the Hills, prioritized scenarios and links to supporting Design Artifacts. Having a robust RB by this milestone is important because it will set you up for success as you move into coding. As Design and Development iterate and progress through Delivery Playbacks, you should continue to keep the team aligned and collaborating with updates to the RB.

Create

Design Artifacts

Release Blueprint

Ask

How are Hills different from a roadmap?

How do we get to the Hills Playback?

How do we get to Playback Zero?

# IBM Design Thinking

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