

The Designing for

The word 'FORWARD' is spelled out using various tools: 'F' is a hand saw, 'O' is a coil of black cable, 'R' is a red-handled clamp, 'A' is a blue-handled utility knife, 'W' is a yellow folding ruler, 'D' is a green utility knife, 'R' is a red-handled screwdriver, and 'A' is a utility knife with a wooden handle.

Field Book

(a step-by-step project guide)

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The Designing for Growth Field Book: a step-by-step project guide

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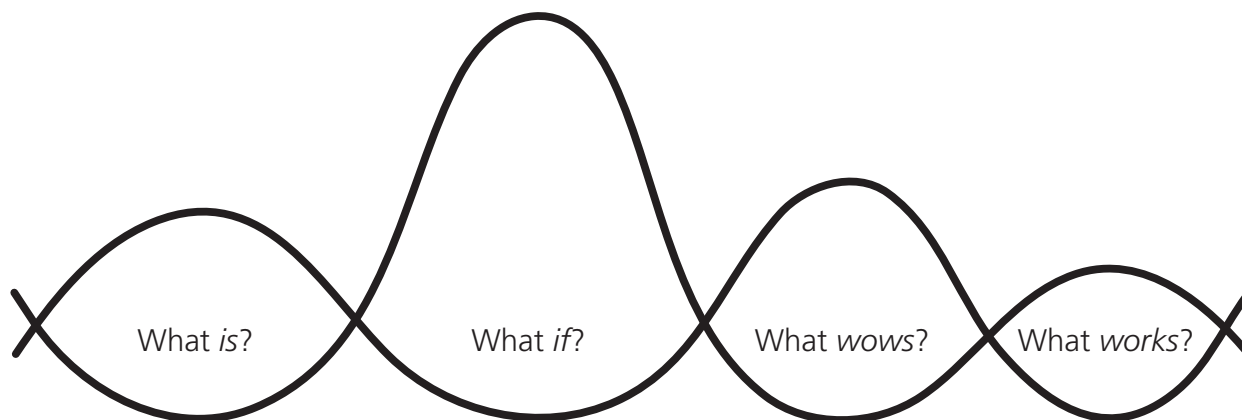
Using Your Field Book

Welcome!

Chances are, if you bought this book, you are facing a messy challenge—and want to use design thinking to create an innovative solution. We have written this field guide to make that process easier, to create a road map for you to manage your innovation project as it unfolds.

A few years ago, Jeanne and Tim wrote *Designing for Growth: A Design Thinking Tool Kit for Managers* (D4G) with the goal of making design thinking tools and methods accessible to any manager interested in using them. Since then, we've learned some new things. Having spent that time helping hundreds of managers tap into design's potential, we saw an opportunity to get even more practical by creating a step-by-step guide. This is that guide—your field book. If you'd like more detail on the design thinking philosophy, you'll find that in D4G. If you own it already, you'll see that it serves as a great companion to this field book. But we think you'll find this field book is a useful guide to managing your project regardless of whether you have read D4G.

In D4G, we laid out a simple process that asked four questions:



What is explores current reality. **What if** envisions a new future. **What wows** makes some choices. **What works** brings us to action. We have built this step-by-step guide around those same four questions, with some reminders about the tools and project management aids we talked about in D4G, and the addition of a few new tools and aids.

We designed this field book for active use. You might ask, “What does that mean?” It means that it’s not meant to stay pristine and pretty. Instead, write in it. Turn down the corners of the pages you like. Tear out the pages you can’t stand. Doodle. Make notes in the margins. Stack and store your sticky notes. But most of all, keep it handy for whatever thoughts occur to you along the way.

Let’s get started.

Although you can use your field book however you like, we suggest that it's particularly useful for three things.

Choosing

A successful design thinking experience begins with a great problem. Before you begin working the four questions, take time to choose a meaty challenge and frame your challenge question. The design brief form and instructions in Steps 1 through 3 of this field book will help you get set up for greatness.

Planning

Every challenge is different, so even with a handy guide like this you'll want to take time to plot your course. Being a good catalyst for problem solving requires planning. Think about which tools will be best suited to your challenge and the people who might be available to help you.

Good news: The steps and tools in this book will guide you along the way. We've also included an example project with completed templates in the final section if you find yourself lost in translation.

Doing

Thinking is fine, but it's also important to deliver results. At some point, you'll need to bring a team together and use the tools you've chosen to navigate your challenge. Grab a flip chart and some markers, follow your plan, use the tools, adjust it if you hit a bump in the road, and see where the journey takes you. This field book is your guide as you take on today's challenge, but you have a lifetime ahead of you to think like a designer.

Along the way, you can also visit Design@Darden, an online portal with more tools (including digital templates and ready-to-print posters) to help you get the action started.

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The Four Questions

What is?

Because our goal in addressing a challenge is to envision and implement an improved future state, it is always tempting to jump right to the future and get started solving. Many managers have been taught that creative thinking starts with brainstorming solutions. But the design process is human-centered and starts with the present, not the future—it begins with what is happening now. Innovative ideas are generated from insights about the current reality for real users, and without those insights, the imagination starves. That is why the **What is** stage is so important.

What is starts with the identification of the right kind of problem for design thinking to solve. Then it creates a design brief to move us into action. This stage ends with the identification of design criteria that point the way toward opportunities that were always there but were hidden. We call this the reframe. The reframe feeds the imagination for the next stage: **What if**. By taking the time to develop deep insight into your problem or opportunity and its context before you start trying to generate solutions, you are also establishing the reference point for change, the constraints that shape it, and the criteria for what success looks like.

What if?

Once you have thoroughly explored and documented **What is**, you can look toward the future and one of our favorite questions: **What if?** The **What if** stage looks like the kind of creative and generative process that we expected design thinking to be all along, but it's surprisingly disciplined in its approach. This is because we want to push beyond simplistic expressions of new possibilities (the kind of output that an initial brainstorming session might produce) and arrive at robust concepts that can be evaluated, prototyped, and (if promising enough) developed.

Initially, the idea of activities like brainstorming makes most managers nervous. It is not the kind of thinking that we are trained in either at school or at work. Instead, we are trained to think critically, to debate and poke holes. This kind of critical thinking is important—but not yet!

A lot of research tells us that if we allow that kind of judging into our process too early it will drive creative ideas right out the door. An important part of asking **What if?** involves putting those hole-poking skills on hold and exploring a wide range of possibilities. Successful design thinkers use clever mental tools and tricks to get out of the habit of breaking things down and criticizing them.



What is?

What if?

What wows?

By the time we ask **What wows**, we have covered a lot of territory. Through the exploration of **What is**, we learned about the stakeholders we hope to serve. Through brainstorming and concept development in **What if**, we have homed in on some concepts that we believe have real potential to create value for our stakeholders and meet organizational objectives at the same time. Now it is time to make hard choices, identifying the best concepts—those that wow—in order to guide our next steps.

Typically, the “wow zone” for a business concept occurs at the intersection of three criteria: your targeted stakeholders want it, you are able to produce and deliver it, and doing allows your organization to achieve its objectives.

To assess whether your new ideas have the potential to wow, you start by identifying the key assumptions that must hold true for your concepts to be successful and the data you’d need to test them. You’ll look at the data you’ve already got to work with. Then, you create a prototype of your ideas that will allow you to engage your stakeholders and get some high-quality feedback. This will set the stage for our final question, **What works?**, when you take these concepts into the field and actually test your assumptions with stakeholders.

What works?

This is the final stage of the design process—when your exciting high-potential concepts come face-to-face with your actual stakeholders in the real world. It represents the key difference between invention and innovation: Invention is doing something in a novel way; innovation requires that the invention be implemented and create value. Invention doesn’t necessarily produce better outcomes for real people; only innovation does that.

We are all tempted to fall in love with the new concepts we have nurtured so carefully in the first three stages of the process. And we have stressed the idea of keeping many options open—but in real life we know it is too expensive to keep all our options open and try everything. Yet when you develop just one concept, you are apt to come up empty-handed if your key stakeholders are not interested in your masterpiece. The choice of which concepts to move forward is best *not* left to the same person who created them (you!). The right person is the same one who inspired you in the first place: the customer.

Instead of observing targeted stakeholders as they navigate the world of **What is**, you now need them to take a walk with you into several possible futures—and to engage them in co-creating a solution with you. This means putting your prototypes in their hands and refining them on the basis of their input until you arrive at a version that is ready for proof-of-concept testing in the marketplace, using the learning launch tool. This final step of the journey will give you enough information to make more solid data-based investment decisions.

What wows?

What works?

The Steps

Step 1: Identify an Opportunity

So that's it! Four simple questions. And we're ready to get started. We'll begin by making sure you've got the right kind of problem to work on.

As you identify your growth opportunity, it's important to consider whether design thinking is a fit for solving it. Design thinking is an approach to solving problems especially suited to conditions of high uncertainty. It is a set of methods that manage risk by placing small bets fast. This approach is not suitable for every challenge. In many cases, more linear methods may work better. For operational challenges where the required change is more incremental and where we have good data from the past that allows us to predict the future, we often find traditional analytic methods to be more resource efficient. The table shown at right will help you choose an opportunity that is suited to the unique methods of design thinking.

Think about Zipcar, the innovative car-sharing service. The original creation of Zipcar was an ideal fit for design thinking. The firm set out to create a new category of transportation service: car rental by the hour, with an element of social responsibility through resource sharing. More than a year after Zipcar proved its model in the dense urban context, it sought to extend its service into small university towns. This follow-on challenge could be addressed with more linear analytic methods, since the

year-plus of operating data from urban markets could help eliminate many of the unknowns.

So, as you choose where to play, use the six questions as a guide to find your opportunity.

Write down an area of opportunity you think you might like to explore:

Now ask yourself the following questions:

Question	Design thinking is appropriate if ...	Linear analytic methods may be better if ...
Is the problem human-centered?	Deep understanding of the actual people (users) involved is both possible and important	There are few human beings involved in the problem or the solution
How clearly do you understand the problem itself?	We have a hunch about the problem and/or opportunity, but we need to explore and get agreement	We understand the problem clearly and are sure we're solving the right one
What's the level of uncertainty?	There are many unknowns (large and small), and past data is unlikely to help us	The past is a good predictor of the future
What's the degree of complexity?	There are many connecting and interdependent facets of the problem; it's hard to know where to start	The path to solving the problem is clear, and analytic methods have succeeded in solving similar problems in the past
What data is already available to you?	There is very little relevant existing data to analyze	There are several clear sources of analogous data
What's your level of curiosity and influence?	I'm excited to explore more and can get a group of people willing to help me	The problem feels routine to me, and I have to follow existing processes and systems

Step 2: Scope Your Project

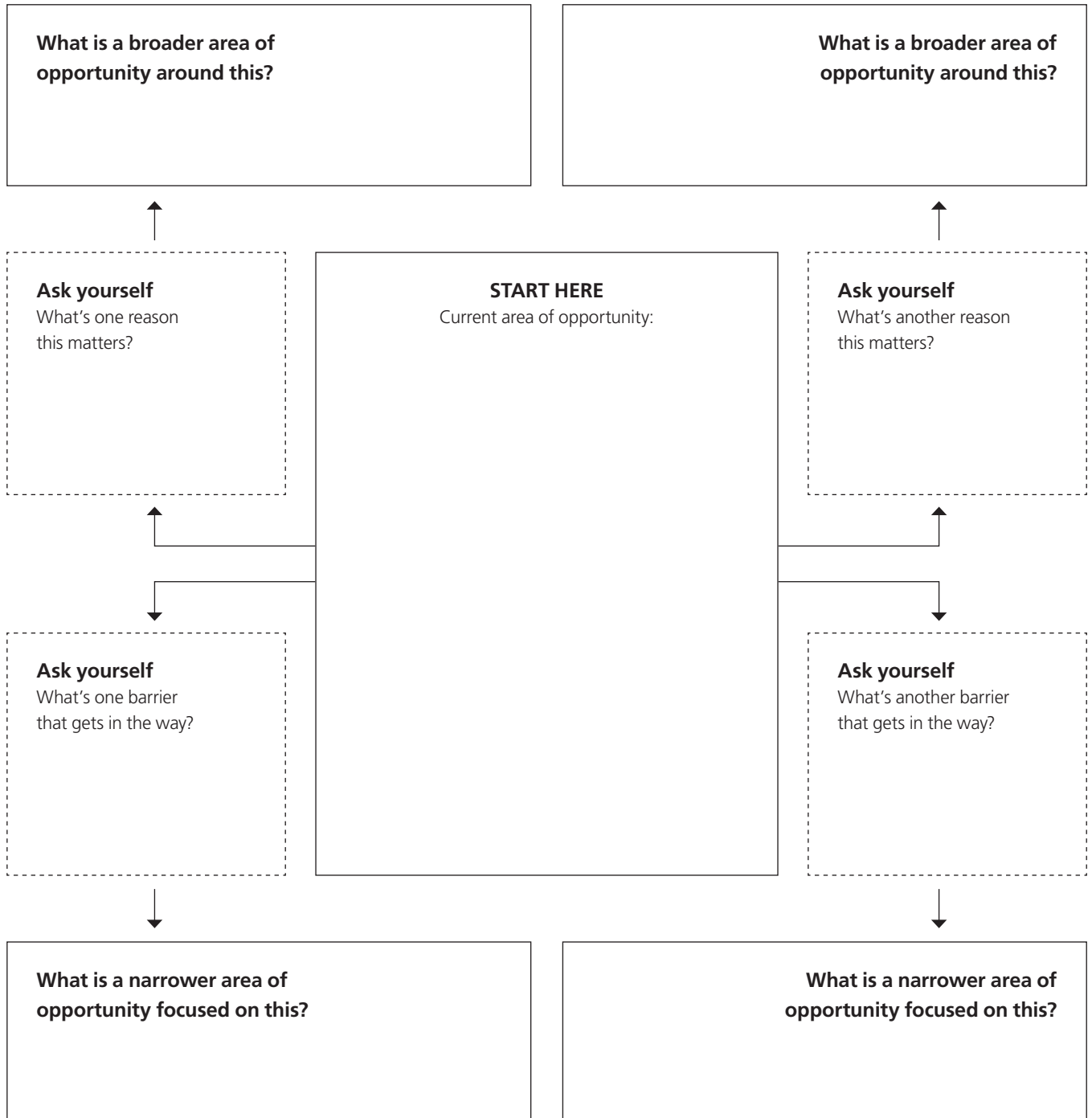
Framing a project and refining its scope are crucial for effectively pursuing new opportunities. Use the framework on the facing page to expand (or focus) your thinking about your project.

Start by thinking about your project in terms of the area of opportunity you want to explore, and write that in the center box. Try to start your statement with an action verb. (For example, if you're working to improve online ordering for a clothing retailer, your initial statement could be something like, "Help people buy clothes for work.")

Then, explore your project from both broader and narrower perspectives. Is there a higher-level challenge out there that might unlock more opportunity? ("Help people look and feel great.") Is there a more focused project that would address a specific barrier that needs to be addressed? ("Help people ensure that online purchases fit.")

Even when your project definition seems really clear, it's worth exploring the reasons and barriers to make sure you're aiming at the right opportunity. Once you've looked both broad and narrow, select a project scope that feels actionable, with enough possibility to make it interesting and enough traction that you can do something about it.

Jot your notes here:



Step 3: Draft Your Design Brief

A well-constructed project process is rooted in a design brief that clarifies the scope of the project, its intent, the questions it hopes to explore, and the target group of stakeholders—internal and external—that it wants to explore them with. The design brief keeps you focused on your business objectives and the strategic opportunities and vulnerabilities your project is meant to address.

We spend time carefully thinking through our plans and ambitions because even though our environment is full of uncertainty, the management of our design project doesn't need to be. Since some key elements of the design process are uncontrollable, it is all the more important to drive ambiguity out of the management of the project itself. That is the role of your design brief—to help you get as much clarity, control, and transparency into the management of your project as possible. It should also be useful for keeping important stakeholders (your boss, your partners, etc.) informed.

The design brief should be limited to two pages so that it is concise and simple to update as the project moves ahead. Here is a template you can use.

As we move forward, we want to keep in mind that the design brief is always a work in progress that may change as our understanding of the problem evolves.

Jot your notes here:

See D4G pages 44-46 for additional detail and examples.

Design Brief

Project Description	<p>What is the problem or opportunity? Describe the project in a few sentences, as you would in an “elevator pitch.”</p>
Scope	<p>What is within the scope of the project and what is outside it? What efforts sit adjacent to this particular project?</p>
Constraints	<p>What constraints do you need to work within? What requirements must a successful solution meet?</p>
Target Users	<p>Who are you designing for? Try to be as specific as possible. Whom do you need to understand? Why are they important?</p>
Exploration Questions	<p>What key questions will you need to answer through your research? What are you curious to learn about your stakeholders and how they think and behave? These may include stakeholder needs to understand better, emerging technical possibilities and new business models.</p>
Expected Outcomes	<p>What outcomes would you like to see?</p>
Success Metrics	<p>How will you measure success?</p>

Step 4: Make Your Plans

Every challenge is different, so take some time to develop a plan that's custom-made for your challenge. Think about your time frame. Consider what tools you might use. (Hint: There's a great planning guide on the facing page.) Will you work alone or with others? (Hint: The more the merrier, especially when exploring **What is** and **What if**) Where will you work? (Hint: A "war room" or other location where you can hang posters helps.) When will you get started? **The sooner the better!**

There are three different elements you will want to consider explicitly: activities (what tools you will use and what you will do), people (the stakeholders and supporters you'll rely on), and research (how you'll gather data to inform your work). Let's look at each in turn.

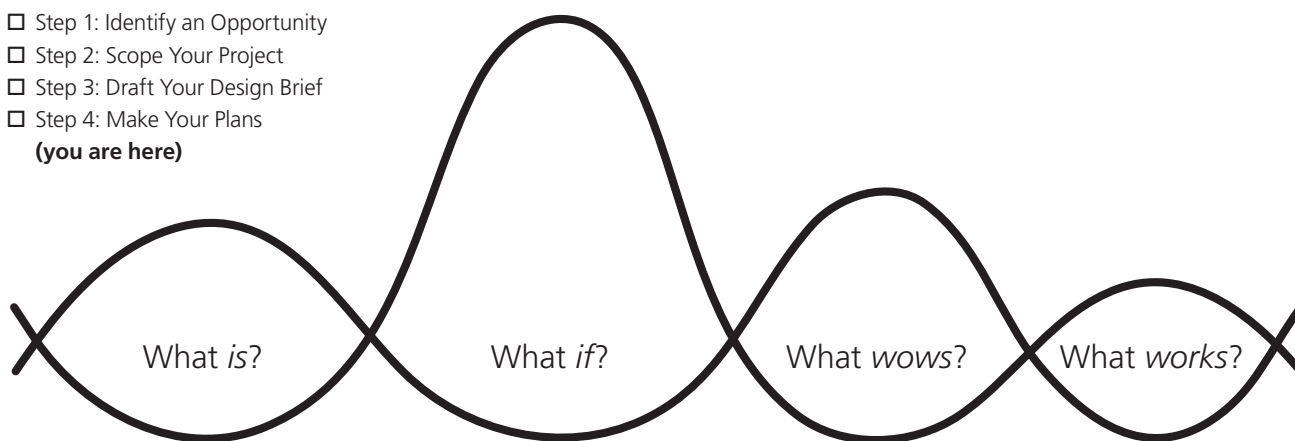
Jot your notes here:

Your Project Plan

How will you approach your journey through the four questions? Take some time to investigate what tools to use and the order in which you'll use them. We suggest that you read ahead now and review the upcoming steps to familiarize yourself with the array of available tools before making your choices below.

Before you begin

- Step 1: Identify an Opportunity
- Step 2: Scope Your Project
- Step 3: Draft Your Design Brief
- Step 4: Make Your Plans
(you are here)



What is?

- Step 5: Do Your Research
 - secondary research
 - direct observation
 - ethnographic interviews
 - job to be done
 - value chain analysis
 - journey mapping
 - personas
 - 360 empathy
 - creating posters
- Step 6: Identify Insights
- Step 7: Establish Design Criteria

What if?

- Step 8: Brainstorm Ideas
 - blue cards and trigger questions
 - analogies/ thief and doctor
 - worst idea
 - contra-logic
 - change perspectives
- Step 9: Develop Concepts
 - anchors
 - bring-build-buy map
 - forced connections
 - combinatorial play
- Step 10: Create Some Napkin Pitches

What wows?

- Step 11: Surface Key Assumptions
- Step 12: Make Prototypes
 - visualization basics
 - storytelling
 - storyboarding

What works?

- Step 13: Get Feedback from Stakeholders
 - co-creation tools
- Step 14: Run Your Learning Launches
- Step 15: Design the On-Ramp

Your People Plan

Now it's time to think about the human beings who are the target of your efforts or whose help you need in order to succeed. Think about the whole range of people your project might impact—customers (internal and external), colleagues, partners, decision makers, thought leaders, competitors. List them here.

Who is already in your network? What's the status of your relationship? Who's not in your network? Where will you locate them? What's your strategy for engaging the ones most critical to your success?

One key when approaching a project full of ambiguity is to take the time to consider people as the complex, multi-faceted creatures they are, complete with needs and wants and motivations. Not only will your efforts help you build alignment and support, they might also provide insights and clues to opportunities that await. Think about a few of the most important stakeholders—customers, colleagues, partners—whose cooperation you need and ask yourself the following questions:

Stakeholder/User #1 Name _____	Stakeholder/User #2 Name _____	Stakeholder/User #3 Name _____
What is their current point of view? How will their behavior or actions need to be different in order to address my challenge?	What is their current point of view? How will their behavior or actions need to be different in order to address my challenge?	What is their current point of view? How will their behavior or actions need to be different in order to address my challenge?
What am I curious about related to this stakeholder?	What am I curious about related to this stakeholder?	What am I curious about related to this stakeholder?
How can I develop empathy for this stakeholder?	How can I develop empathy for this stakeholder?	How can I develop empathy for this stakeholder?

Your Research Plan

When it comes to design thinking, our inspiration comes from data. But it's not simply data that we've grown accustomed to from reading financial reports and studying compiled survey data. Instead, we're looking for data on a very human scale—individual stories about people and their needs and how they relate to your opportunity.

Take a moment to think about whom you might need to interview or observe in order to gather this kind of human-centered data. Later on in the field book, you'll explore a few different approaches to help you gather the information and make sense of it. In the meantime, use this space to begin your research plan. You can always come back later to add to or adjust it.

Who or what will we study?	Where will we find the people or information?	What questions/issues will we explore?	Number of observations, interviews, or inputs	When will the research happen?	Who on the team is responsible?