Design Thinking Workshop

AFAC

June 4, 2021

Workshop 2
TODAY’S PLAN

• Review Human Centered Design process
• Introduce journey mapping
• Break
• Introduce prototyping and testing
• Pick one point along the journey map you want to prototype and test
• Debrief and close
<table>
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<tr>
<th>Human Centered Design</th>
<th>Applied creativity with no one simple formula</th>
<th>Good for “wicked” problems</th>
</tr>
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<tbody>
<tr>
<td>An approach to finding and solving worthwhile problems creatively, paying special attention to the human needs at the heart of the opportunity</td>
<td>A flexible set of methods, mindsets, and behaviors that help practitioners be resourceful, inventive, and collaborative</td>
<td>A way to navigate ambiguous, undefined, or complex challenges that don’t have ‘right’ answers</td>
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HUMAN CENTERED DESIGN
A PRACTICE TO
NAVIGATE AMBIGUITY

BIAS TOWARD ACTION

PAY ATTENTION AND MAKE SENSE
Do you remember the steps in the process?
Problem finding & framing + Problem solving & testing
Did anyone do interviews? Any insights?
What is a program you are launching/designing? (not org mission)

[Add notes Here]

Who are you trying to reach? Be specific...

[Add notes Here]

What do you know... what assumptions do you have...

[Add Thoughts Here]

What questions do you have?

[Add notes Here]
Human-Centered Design Sprint

- Empathize
- Define
- Ideate
- Prototype
- Test
What is a program you are revising or redesigning? (not your org’s mission)

When is the program taking place?

Who is the audience/target group?
What is it and how does it work? (previous workshop)
Journey Maps *(often)*:
- Chronological
- Human *(describes a person’s journey)*
- Both objective *(events)* and subjective *(emotional)*
A Customer Journey map is a visual or graphic interpretation of the overall story from an individual’s perspective of their relationship with an organization, service, product or brand, over time and across channels. [...] The story is told from the customer’s perspective, but also emphasizes the important intersections between user expectations and [organization’s] requirements

– Megan Grocki at UX Mastery
Journey Map for Creating

Journey map that outlines "the plan" —

A mapping to describe a way to better deliver a program, or change a journey for the better.

(Or at least what/when to pay attention to.)
Customer Journey Map of an Uber Customer

Customer Goals:
To find transport to get to a destination quickly and effectively, other than driving their car.

Key Customer Journey Stages:
- Research
- Validate
- Commit
- Receive
- Use
- Monitor and Maintain

Key Customer Objectives:
- Need to research transport options
- Need to choose a reliable and cost-effective transport
- Want to connect with someone from Uber
- Want to share my trip on social media
- Want to have a trouble-free booking experience
- Want to have a smooth journey
- Want to have a positive engagement with my driver
- Want to provide feedback on my driver
- Want to manage my experience

Transport Options:
- Mobile App
- Website
- Facebook
- Twitter

Customer Journey Analysis:
- Understanding customer needs and expectations
- Identifying pain points and areas for improvement
- Prioritizing areas for intervention

Development:
This is an example of a Customer Journey Map developed by CXD (Customer Experience Design). The CXD (Customer Experience Design) framework is used to ensure a seamless and personalized experience for the customer.
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| During workshop | - I want to learn how I can apply this content back home  
- I want to meet some interesting people |
| Post workshop | - I want to continue my learning after this experience  
- I want to be able to continue to access resources from DSS |
Journey's Phases

User's Objectives

"I want... or I need..."

Desired Emotion
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Journey Map
Design Thinking for Public Policy Innovators

Name: AMF

Most valuable: presenting without tech in a way that feels professional.

Most surprising:

- Learning how I've developed a way of thinking that seems manual/not intuitive to ppl but I didn't realize since I've been working in teams of similar ppl for years.

- Team discomfort: lack of communication about goals & perspectives.

---

emotional journey
learning journey

Icon courtesy of Juan Pablo Ballejo, James Young
Journey Map
Design Thinking for Public Policy Innovators

Name: AMF

Most valuable:
- presenting without tech in a way that feels professional

Most surprising:
- learning how I've developed a way of thinking that seems weird/not intuitive to ppl but it didn't realize since I've been working in teams of similar ppl for years!

Team:
- discomfort
- lack of communication
- different goals & perspectives

emotional journey
learning journey
Pair share

• Share your journey map with your partner
  • Do they see any additional points along the journey map that you might add/revise?
  • Do they see any additional emotions that you might add?
Pick a moment along the map where you have questions or that is a pain point

• Circle the point on your map
## DSS Workshop

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- I want to know who else is in the program | Informed Curious | Curious |
| Apply to workshop | - I want to know how long the application will take  
- I want to know how competitive it is  
- I want to know what makes a good application | Confident Supported | Supported Intimidated |
| Get accepted | - I want to know who else is in the program  
- I want to know what is expected of me | Welcomed Excited | Welcomed Excited |
| During workshop | - I want to learn how I can apply this content back home  
- I want to meet some interesting people | Engaged Connected  
Supported | Overwhelmed Nervous |
| Post workshop | - I want to continue my learning after this experience  
- I want to be able to continue to access resources from DSS | Empowered  
Bold and willing to experiment | Empowered  
Bold and willing to experiment |
Pick a moment along the map where you have questions or that is a pain point

• Circle the point on your map
• What are your questions? (list at least 3)
• What assumptions are you making? (list at least 3)
Pick a moment along the map where you have questions or that is a pain point

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IDEA DASHBOARD 1

What’s the solution?
**Passenger-Pair Guidance:**
Pair passenger with navigation/language needs with another passenger to get to the gate.

Who/how to implement it?
Airline program that pairs passenger needing assistance with another passenger willing to help. Reward passenger who helps. Airline ‘receives’ passenger at the gate.

What change will it create?
Provides assistance to those who need some help getting to the gate. Creates ease-of-mind for passengers (and family members at home) who worry about navigation to gate. Could create more shared interest/community among passengers on same flight.
QUESTIONS & ASSUMPTIONS (Idea 1)

Which idea: Passenger-Pair Guidance
Who are you designing for?: Air Passengers at SFO who need more assistance with language/navigation

What are the questions (esp. about behavior) you want to answer with your prototype?

- What would someone need to feel comfortable with a fellow-passenger-guide?
- Does the guide need to speak the same language as the guided passenger?
- Should the match be made on the spot -- or arranged in advanced?
- Does a reward for guide make them more likely to want to help? Does it attract best matches?
- What instructions / precautions are needed for good guidance and safety?
- What are norms/rules for how quickly / directly to proceed? What interactions are norm?

What assumptions do you want to test?

- Passenger currently ordering wheelchair service often just need/want navigation help.
- Check-in to gate (or gate to gate) guidance would be enough for many passengers -- not all the way to plane.
- Passenger trust each other enough for this to work.
- Family members of passengers would trust another passenger for guidance.
Take care of yourself.

Come back in 10 min

BREAK
Human-Centered Design Sprint

1. Empathize
2. Define
3. Ideate
4. Prototype
5. Test
Cost of an error and prototype & learn here. Too late.
Prototype to ideate

(Build to think)
Prototype before you are ready
Tourism on the moon
How would you prototype that?
What assumptions or questions about human behavior and experience do you want to test?
What assumptions or questions about human behavior and experience do you want to test?

Design experiments to deploy somewhere in your neighborhood.
Prototype to answer questions
(The prototype might not resemble the solution)
Prototype at the resolution of your thinking.
Test the CONCEPT
How do people react?
Is it desirable?

Test the EXPERIENCE
Do people use it?
How does it work?

Test for BEHAVIOR
Does behavior change?

Test for OUTCOMES
Does it produce the hypothesized outcomes?
Test the
CONCEPT

How do people react?
Is it desirable?

Test the
EXPERIENCE

Do people use it?
How does it work?

Test for
BEHAVIOR

Does behavior change?

Test for
OUTCOMES

Does it produce the hypothesized outcomes?
If you live in a city with not enough public spaces and parks - how might you address it?
Increase accessible public green spaces in urban areas

to ultimately…
increase pedestrian activity
increase neighborhood activity
increased development of social capital
increase economy activity
What might you do in one day as an experiment to create a publicly accessible space?
## 1) Select one question or assumption

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2) How could you test that in the coming week?
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Case Study
How might we increase percentage of wealth advisors (at large financial institutions with internal philanthropy units) who launch philanthropy planning processes with high net worth clients?
Ethnography conversation with individual advisors & financial institution’s philanthropy units
Experiment Expeditions

Select the level you want to explore:

Level I
- Help clients with what problem to solve
  - Define values
  - Develop guidelines on giving amount
  - Determine appropriate giving vehicle

Level II
- Help clients explore how to solve the problem
  - Narrow areas of focus
  - Craft philanthropic mission statement
  - Find organizations to explore, networks to join, and places to get more education

Level III
- Help clients measure impact
  - Plan a philanthropy budget according to desired impact
  - Determine how to evaluate philanthropic impact
Prototype Iterations

Prototype 1&2

Select the level you want to explore:

- Level I: Help clients with what problem to solve
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- Level III: Help clients measure impact
  - Plan a philanthropy budget according to desired impact
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Prototype 3&4

Welcome to the Wealth Advisor’s Philanthropy Toolkit

Helping your clients give with impact
Prepared by Stanford University’s Effective Philanthropy Lab (EPC)

Enter Toolkit

Prototype 5

I’m interested in being philanthropic, where do I start?

Prototype 6

The Wealth Advisor’s Philanthropy Tool Kit
Helping your clients give with impact
Prepared by the EPC at the Stanford University Lab on awarded
Testing with many

Testing with many...

Co-creating with...

Testing and Co-creating with a partner
Testing with the sector

Feedback from 10 banks
and
3 donor advised funds
How do you find your focus areas?
I. Clarify your motivations and values
II. Narrow your focus areas
III. Contribute your time and talent.

How do you involve your family?
I. Involve your family in your philanthropy
II. Involve the next generation

How do you structure your giving?
I. Determine your philanthropy budget
II. Select your giving vehicles

How do you find and vet organizations?
I. Find focus-aligned organizations
II. Understand how organizations can achieve their intended outcomes
Q&A
Be explicit about how you will generate and collect the data you need; and what would be disconfirming data.

Have stakeholders “deploy” the prototype.

Plan for an end.
What about your idea is/isn’t working for your user?

- Showcase your prototype to the user.
- Let the user contribute feedback/ideas that build on your prototype.
- Note: You are not “selling” your idea. You are learning what the user thinks and feels because testing is another opportunity to learn more about the user.

4 minutes per partner
What are some key behavior(s)?

- Understand people deeply
- Gain Insights to Discover New Possibilities
- Be Generative Before Deciding
- Make Ideas Tangible
STORY OF YOUR NAME
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**DESIGN PRACTICES**
What’s the solution?

**Passenger-Pair Guidance:**
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- Passenger trust each other enough for this to work.
- Family members of passengers would trust another passenger for guidance.
PROTOTYPING DASHBOARD (Idea 1)

With whom will you test?

Tester 1: TBD
Tester 2: TBD

How/where will you test?

Test via Zoom with people who have used wheelchair assistance in the past for navigation, or might desire/benefit from guidance.

What question or assumption are you testing?

What would someone need to feel comfortable with a fellow-passenger-guide? How to set proper norms between the two.

What artifacts are you using?

A ‘official’ pairing card for both guide and guided passengers -- outlining instructions for each.

Who is leading the testing?

Round 1: Nadia lead, Thomas capture/follow-up

Who is capturing the feedback?

Round 2:
TESTING FEEDBACK (Idea 1)

AMPLIFY
Elements that need to make more pronounced.

ADDRESS
Elements not working. List what needs you need to do.

EXPLORE
Unresolved or unclear response to investigate.

CONSIDER
New ideas that come up or ideas you have.
TESTING APPROACH

Greet and set-up minimal context

Create the experience. (Commit to the bit.)

Observe and capture notes (or record).

Follow-up with conversation.
(Ask about what happened and how it felt.)
AIM FOR EXPERIENTIAL

- Show an image/storyboard
- Role-play a mock-scenario
- Give digital/physical stuff and have them complete a real task/experience
- Prepare a custom experience for someone to try out IRL
- Go in context and have relevant stakeholders implement the test
Prototype with a Safe-to-Fail approach
If we run this prototype and it fails or something unexpected happens, we are not compromising the physical, mental, or emotional safety of people we are asking to test the prototype.
What are potential unintended consequences of testing this idea? What is the risk to our community members, and how do we mitigate it?
YOUR PROTOTYPING

What can you create or do to test your assumptions and questions about your concept?

Focus on human experience and behavior.
TEAM TIME TODAY

Take forward two ideas per team. (Work in pairs.)

List questions/assumptions about each solution.

Conceptualize and build your prototype.
Plan the logistics and mechanics of testing.
what CHANGE are you aiming to create (for people)?

Create ways for wealth advisors to support their client’s philanthropic planning process

WHO are you aiming to affect?

For wealth advisors at large financial institutions; (and in turn, high wealth donors)

QUESTIONS you aim to answer in this expedition

• Do advisors want to provide philanthropic advice?
• What support are they already providing?
• How knowledgeable are they about the philanthropic planning process?
• How are they rewarded for providing this advice?
what CHANGE are you aiming to create (for people)?

Create ways to increase wealth advisors’ confidence in starting the philanthropy conversation with their high net worth clients

WHO are you aiming to affect?

For wealth advisors at large financial institutions;
(and in turn, high wealth donors)

QUESTIONS you aim to answer in this expedition

- What is the best format for a resource to support philanthropic conversations?
- Will they use a resource provided by a third party?
- How much information do we need to provide?
- Does the advisor want to use the resource with the client or to prepare for the client meeting?
Some Pre-expedition List of Questions

What structures/tools might we use to advance through the work? (and Where and with whom to do the work?)

How do you create different configurations of ‘team’ to both share power, and effectively advance project work?

How do a wide group of stakeholders (particularly those most affected by outcomes) have a voice in decision making?

What context and knowledge to understand before engaging in first-hand ethnography/experimentation?
Select an activity/outcome area to focus on.

We recommend you select an area of work that is underway but still requires significant exploration. (In other words, a design approach of discovery, ideation, and experimentation would be beneficial.) We would like you to think at the level of an ‘activity’ to bound the scope of the work.

The activity may be:
- Existing; needs to be evaluated and iterated or substantially redesigned (e.g., it is not achieving the desired outcomes), or
- Not existing; it needs to be created.

If ‘a.’ then start with writing the activity first; if ‘b.’ start with the outcome, and then write the current idea for the activity (or think of many possible activities).

Select an area of work in which you are designing for someone other than yourself and your team. Ideally, select an area where you are designing for, or affecting, an end beneficiary. (More on this later.) Most important, choose something you care about, and on which you have agency to act.

The “design project” you will scope (in the subsequent steps) will be a piece of the work to advance this activity/outcome area. In the end, you will outline a day of design fieldwork that will help you advance this activity and get closer to your desired outcome.

Write the three elements (activity, activity outcome, ultimate outcome) below. See examples on the next page.

**Activity** (Service/Experience/Offering)
- What do/will you produce and implement?
- Indicate those targeted/affected as specifically as possible (in a way that bounds the endeavor).

**Activity Outcome** (Intermediate Outcome) (Near Star)
- What changes do you (aim to) create?
- The qualitative and quantitative impact you have seen or desire within 3-5 years, due to your program.

**Ultimate Outcome** (Guiding Star)
- Articulate and visualize a desired new future state. (Imagine a city/community where...)
- Provide specific changes and the desired ultimate impact.
- Supported
- Challenged
- Reassured
- Validated
- Challenged
- Instigated
- Agitated
- Impassioned
- Wooed

- Irritated
- Inspired
- Alarmed
- Enthusiastic
- Committed
- Excited
- Ruffled
- Hosted
- Listened to