

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

HUMAN CENTERED DESIGN

An approach to finding and solving worthwhile problems creatively, paying special attention to the human needs at the heart of the opportunity

Applied creativity

A flexible set of methods, mindsets, and behaviors that help practitioners be resourceful, inventive, and collaborative

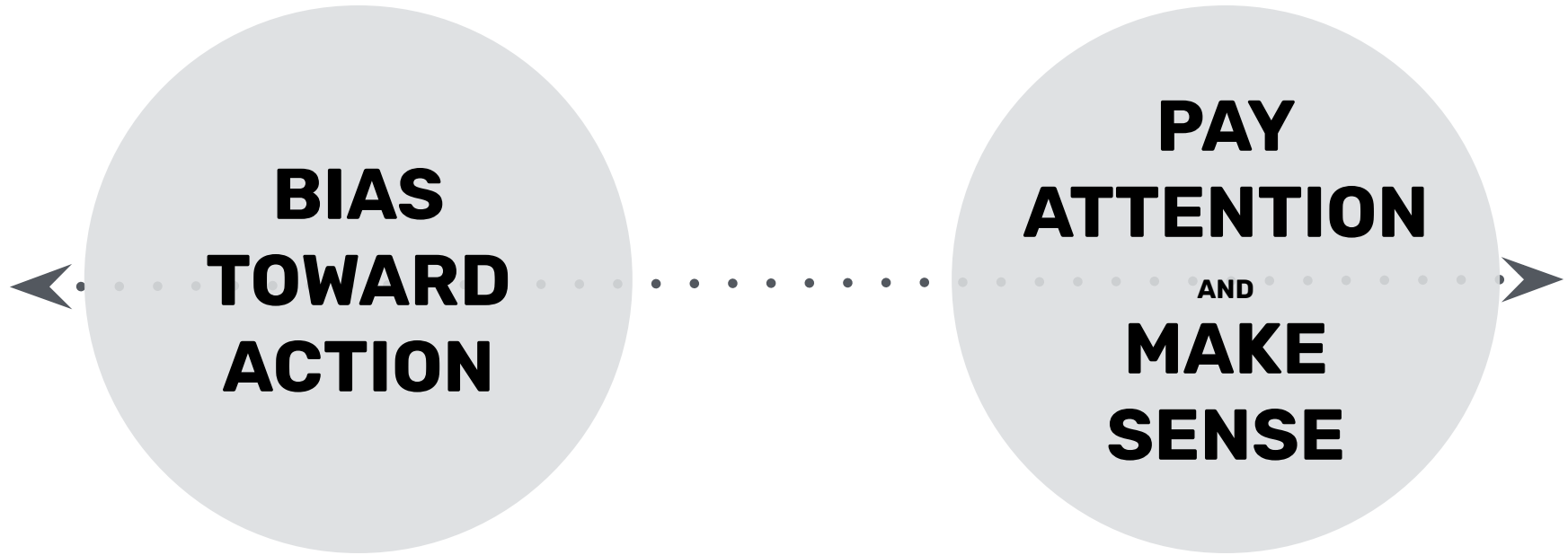
with no one simple formula

A way to navigate ambiguous, undefined, or complex challenges that don't have 'right' answers

good for “wicked” problems

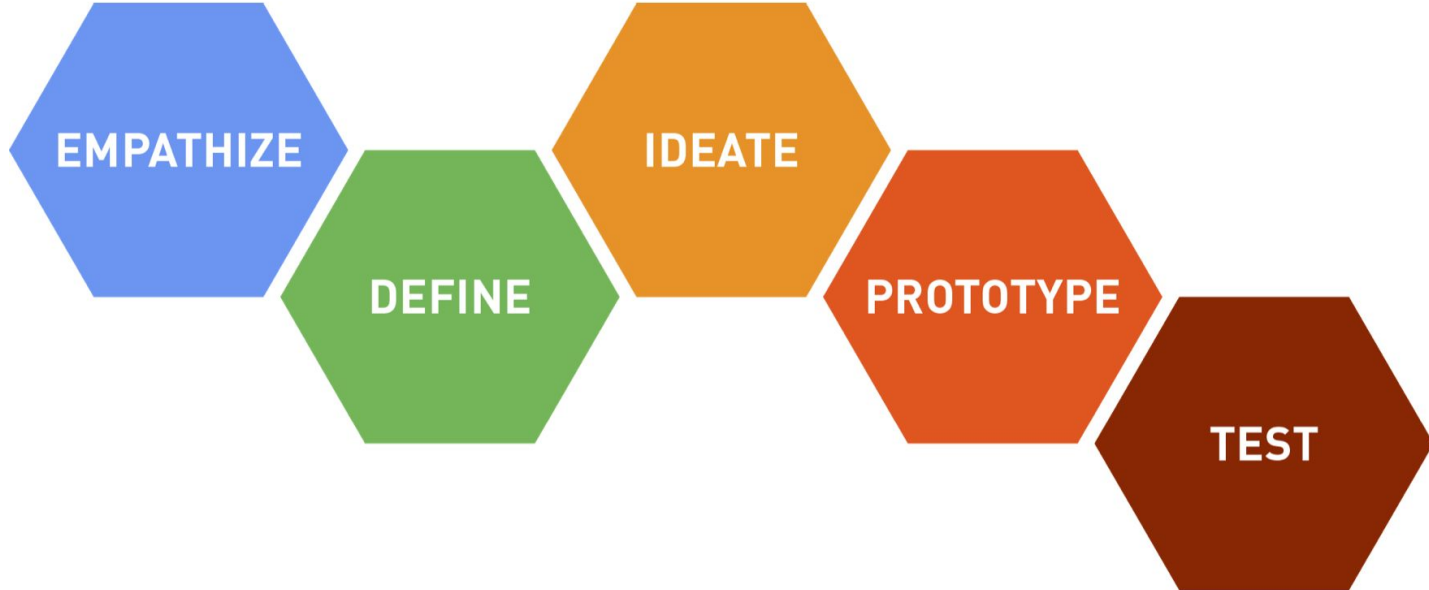
HUMAN CENTERED DESIGN

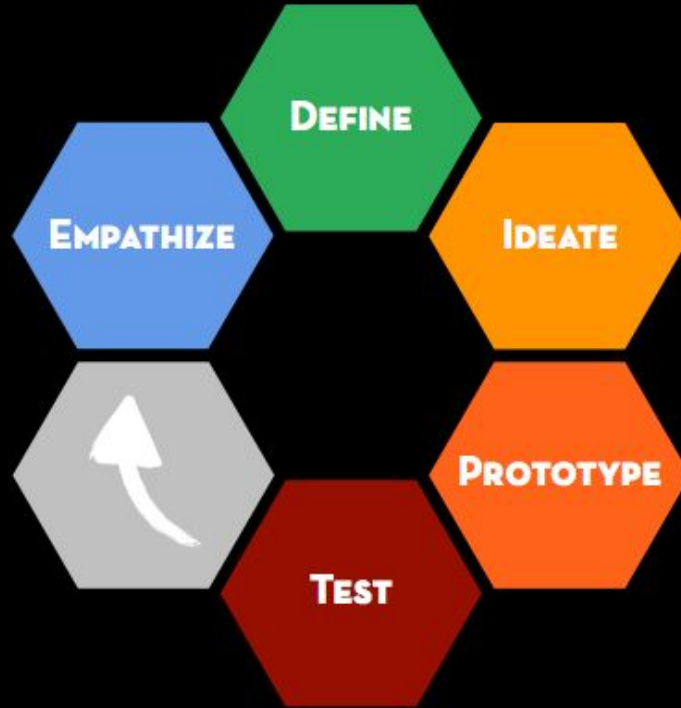
A PRACTICE TO
NAVIGATE AMBIGUITY

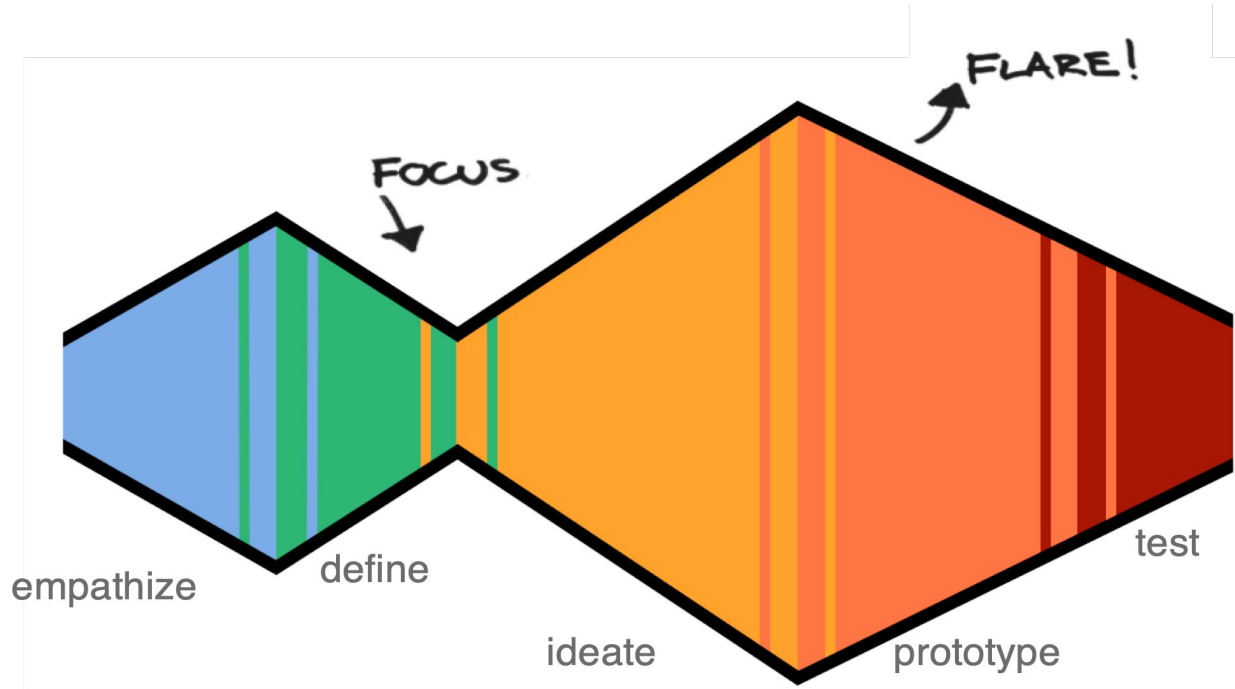




Do you remember the steps in the process?







Problem finding & framing + Problem solving & testing



Did anyone do interviews? Any insights?

Team: _B'sarya for Arts_____



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]

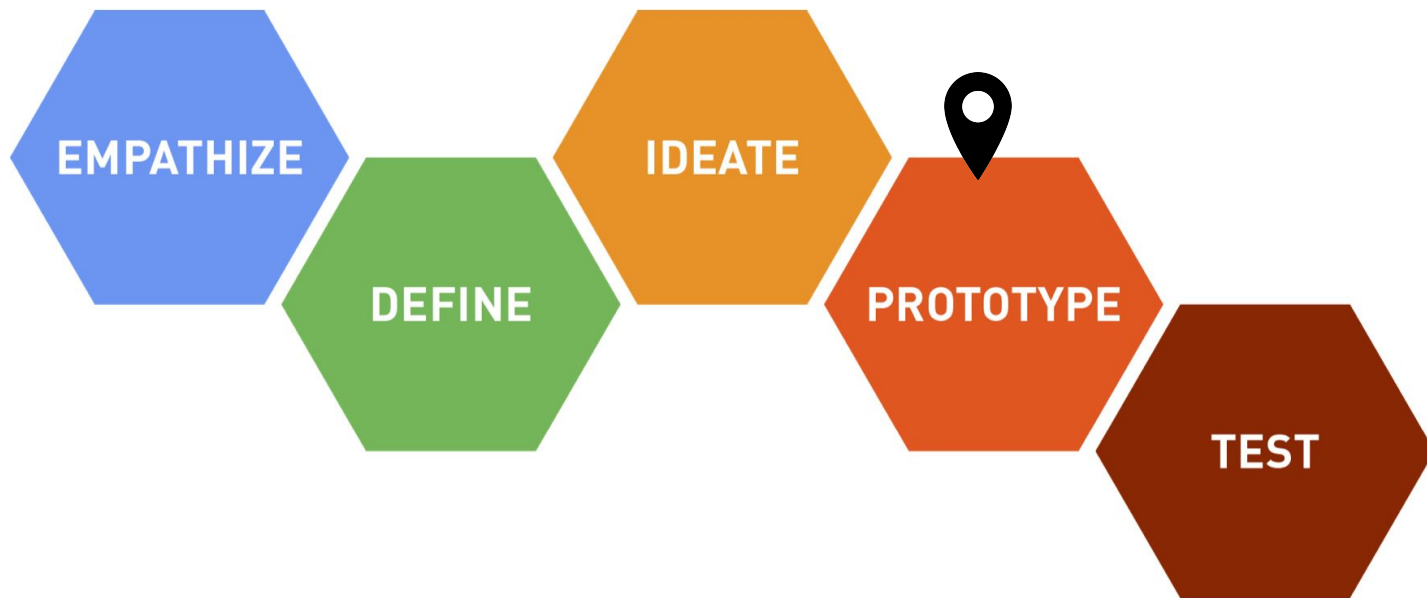
What do you know... what assumptions do you have...

[Add Thoughts Here]

What questions do you have?

[Add notes Here]

Human-Centered Design Sprint



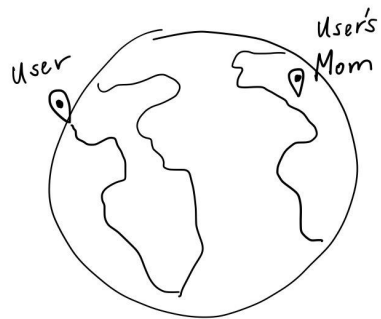


What is a program you are revising or redesigning?
(not your org's mission)

When is the program taking place?

Who is the audience/target group?

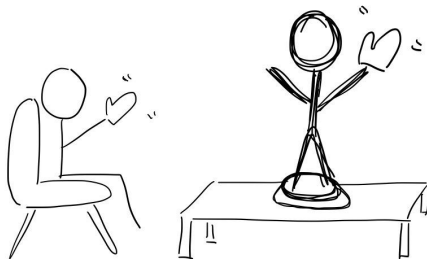
What is it and how does it work? (previous workshop)



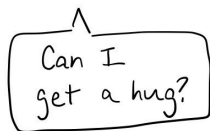
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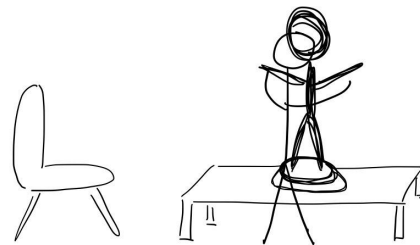
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③

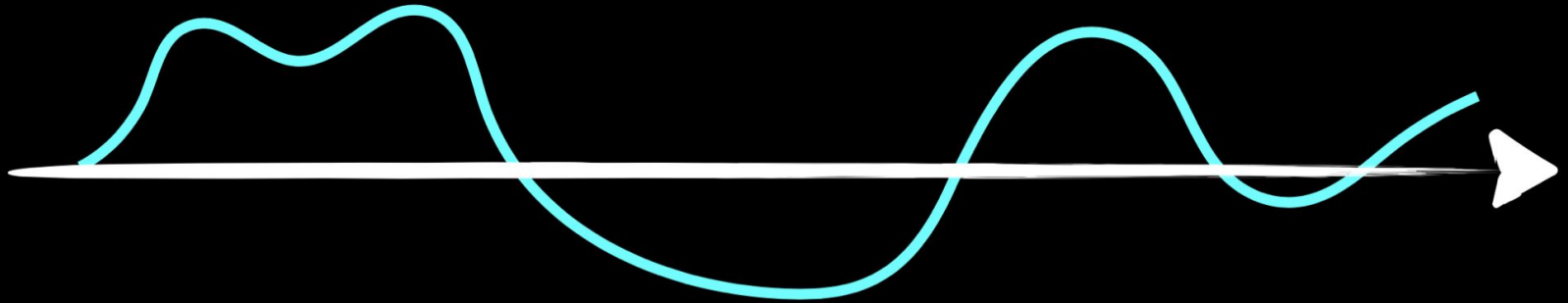


④




⑤





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.)

The South Mall Visitor Journey SUMMARY OF VISITOR MOMENTS





Customer Objectives

Touchpoint Analysis

Experience Analysis



The figure displays 36 customer journey maps for Uber, organized into a 3x12 grid. Each map represents a stage in the customer journey, from initial research to post-trip management. Each map is divided into three horizontal sections: Customer Objectives, Touchpoint Analysis, and Experience Analysis.

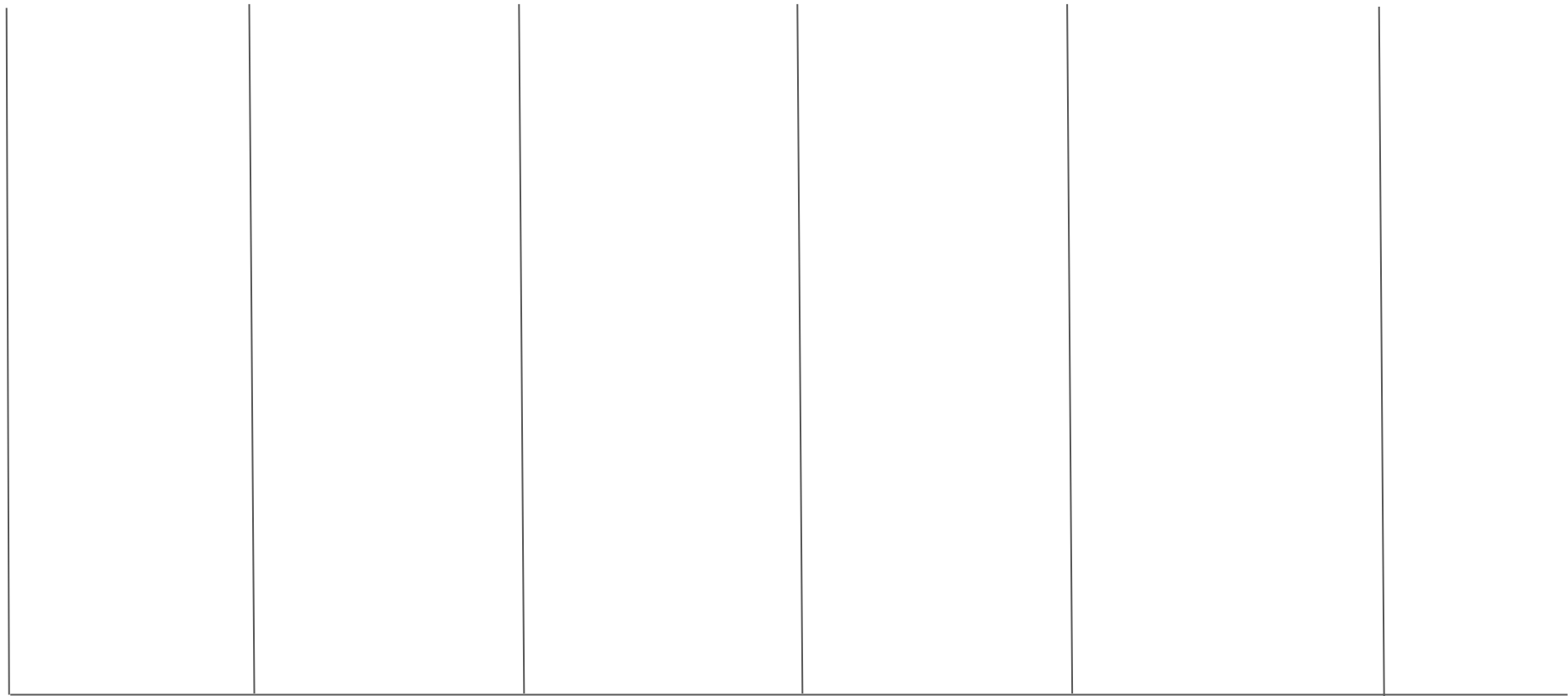
Customer Objectives: Each map starts with a specific customer goal (e.g., "I need to research transport options", "I want to easily set my travel offers"). Below the goal is a table with columns for Success Criteria, Touchpoints, and Feedback. Success criteria are listed as bullet points, and touchpoints are listed as icons. Feedback is provided as a short paragraph.

Touchpoint Analysis: This section identifies the touchpoints used by the customer to achieve their objective. It includes a table with columns for Channel, Status, and Feedback. Status is indicated by a color-coded bar (green for good, orange for fair, red for poor). Feedback is provided as a short paragraph.

Experience Analysis: This section provides a detailed analysis of the customer's experience. It includes a table with columns for Channel, Status, and Feedback. Status is indicated by a color-coded bar (green for good, orange for fair, red for poor). Feedback is provided as a short paragraph.

The 12 stages of the customer journey are:

- I need to research transport options
- I need a quick, safe and cost effective transport
- I want to contact someone from Uber
- I want to check out reviews on social media
- I want to easily set my travel offers
- I want to easily finalise my booking
- I want to know the status of my booking
- I want to have a positive engagement with my driver
- I want to know if I am getting value for my money
- I want to provide feedback on my experience
- I want to manage my account



Journey's Phases

1

2

3

4

5

DSS Workshop

Journey's Phases	Learn about workshop	Apply to workshop	Get accepted	During workshop	Post workshop	

Journey's Phases

User's Objectives

1

2

3

4

5

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

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

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

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

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

DSS Workshop

Journey's Phases		Learn about workshop	Apply to workshop	Get accepted	During workshop	Post workshop	
User's Objectives	- I need to know if they are reputable - I need to know if I'm qualified. - I need to know if I can afford it. - I want to know who else is in the program	- 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	- I want to know who else is in the program - I want to know what is expected of me	- I want to learn how I can apply this content back home - I want to meet some interesting people	- I want to continue my learning after this experience - I want to be able to continue to access resources from DSS		

Journey's Phases	1	2	3	4	5	
	"I want...or I need..."	"I want...or I need..."	"I want...or I need..."	"I want...or I need..."	"I want...or I need..."	
	Desired emotion	Desired emotion	Desired emotion	Desired emotion	Desired emotion	

DSS Workshop

Journey's Phases	User's Objectives				
	Desired Emotion				
Journey's Phases	Learn about workshop	Apply to workshop	Get accepted	During workshop	Post workshop
	<ul style="list-style-type: none">- I need to know if they are reputable- I need to know if I'm qualified.- I need to know if I can afford it.- I want to know who else is in the program	<ul style="list-style-type: none">- 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	<ul style="list-style-type: none">- I want to know who else is in the program- I want to know what is expected of me	<ul style="list-style-type: none">- I want to learn how I can apply this content back home- I want to meet some interesting people	<ul style="list-style-type: none">- I want to continue my learning after this experience- I want to be able to continue to access resources from DSS
	Informed Curious	Confident Supported	Welcomed Excited	Engaged Connected Supported	Empowered Bold and willing to experiment

Actual emotinos	Journey's Phases				
	User's Objectives				
	Desired Emotion				
	Actual emotinos				
	1	2	3	4	5
	"I want...or I need..."	"I want...or I need..."	"I want...or I need..."	"I want...or I need..."	"I want...or I need..."
	Desired emotion	Desired emotion	Desired emotion	Desired emotion	Desired emotion
	Actual emotions	Actual emotions	Actual emotions	Actual emotions	Actual emotions

DSS Workshop

Journey's Phases	Learn about workshop	Apply to workshop	Get accepted	During workshop	Post workshop	
User's Objectives	<ul style="list-style-type: none">- I need to know if they are reputable- I need to know if I'm qualified.- I need to know if I can afford it.- I want to know who else is in the program	<ul style="list-style-type: none">- 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	<ul style="list-style-type: none">- I want to know who else is in the program- I want to know what is expected of me	<ul style="list-style-type: none">- I want to learn how I can apply this content back home- I want to meet some interesting people	<ul style="list-style-type: none">- I want to continue my learning after this experience- I want to be able to continue to access resources from DSS	
Desired Emotion	<div>Informed</div> <div>Curious</div>	<div>Confident</div> <div>Supported</div>	<div>Welcomed</div> <div>Excited</div>	<div>Engaged</div> <div>Connected</div> <div>Supported</div>	<div>Empowered</div> <div>Bold and willing to experiment</div>	
Actual Emotions	<div>Curious</div>	<div>Supported</div> <div>Intimidated</div>	<div>Welcomed</div> <div>Excited</div>	<div>Overwhelmed</div> <div>Nervous</div>	<div>Supported but want additional help and guidance</div>	



INTRO

TAKE ON TWO CHALLENGES

APPLY IT TO YOUR WORK

Journey Map Design Thinking for Public Policy Innovators

Name: **AMI**

excited



😊 most valuable
presenting without tech
in a way that feels
professional

🧐 most surprising
learning how I've
developed a way of thinking
that seems ~~mind~~ 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
different goals & perspectives

frustrated



Emotional Scale

Mind Blown!!

Learning Scale

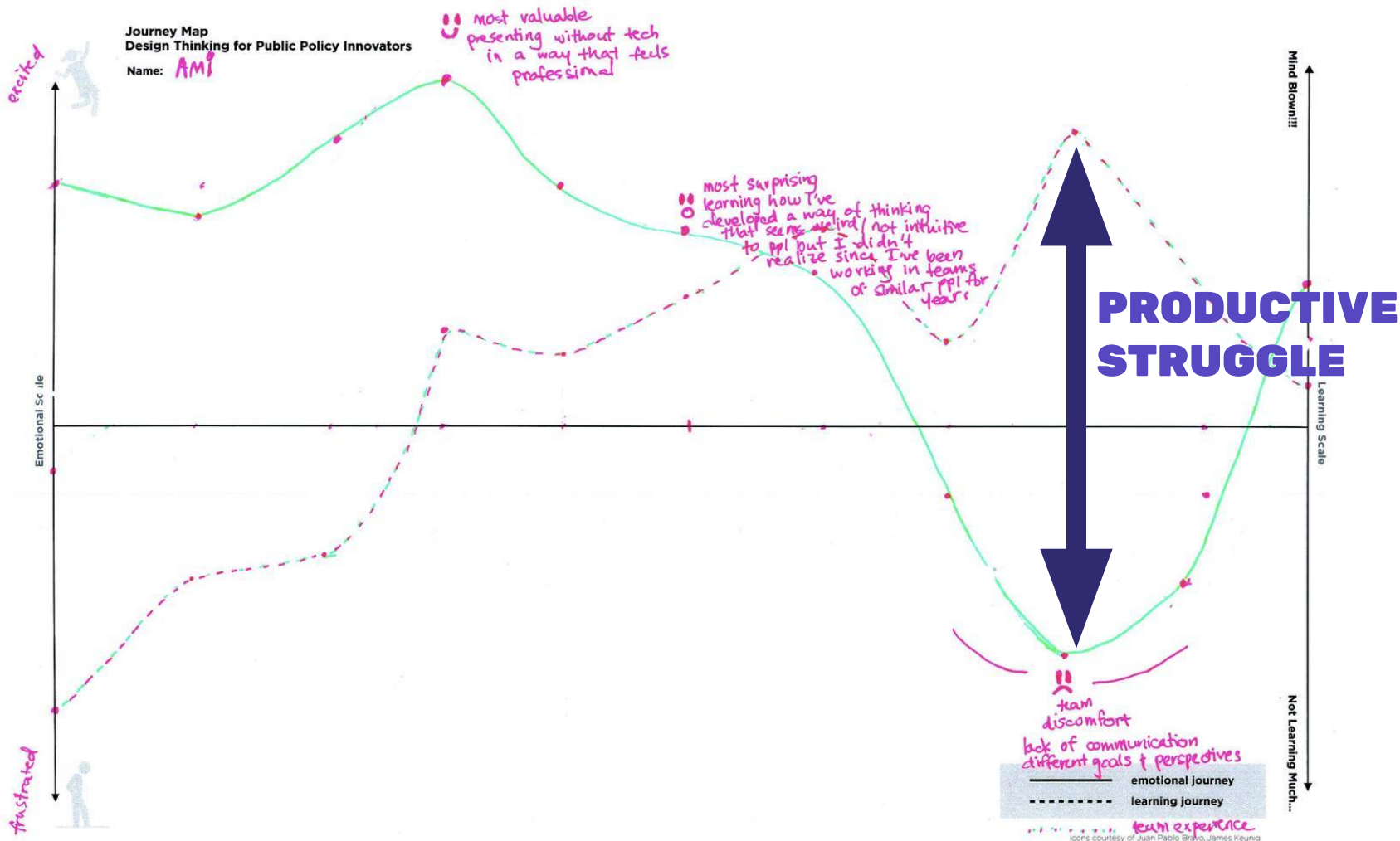
Not Learning Much...

team experience
icons courtesy of Juan Pablo Bravo, James Keung

emotional journey
learning journey

Journey Map
Design Thinking for Public Policy Innovators

Name: AMI



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

Journey's Phases	Learn about workshop	Apply to workshop	Get accepted	During workshop	Post workshop	
User's Objectives	<ul style="list-style-type: none">- I need to know if they are reputable- I need to know if I'm qualified.- I need to know if I can afford it.- I want to know who else is in the program	<ul style="list-style-type: none">- 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	<ul style="list-style-type: none">- I want to know who else is in the program- I want to know what is expected of me	<ul style="list-style-type: none">- I want to learn how I can apply this content back home- I want to meet some interesting people	<ul style="list-style-type: none">- I want to continue my learning after this experience- I want to be able to continue to access resources from DSS	
Desired Emotion	Informed Curious	Confident Supported	Welcomed Excited	Engaged Connected Supported	Empowered Bold and willing to experiment	
Actual Emotions	Curious	Supported Intimidated	Welcomed Excited	Overwhelmed Nervous	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

Questions you have, esp about behavior

- How much information is too much information?
- How much time can we expect them to dedicate between sessions?
- Are they comfortable using Mural? Or Google docs?
- Can we send pre-work and do they have enough context to complete it?
-

Assumptions you want to test

- They are open to doing additional work between sessions
- They have approval from their work to focus on the workshop objectives and not have to do other work during the workshop time
- They are eager to learn and are not just taking the workshop for credit/affiliation
-

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?

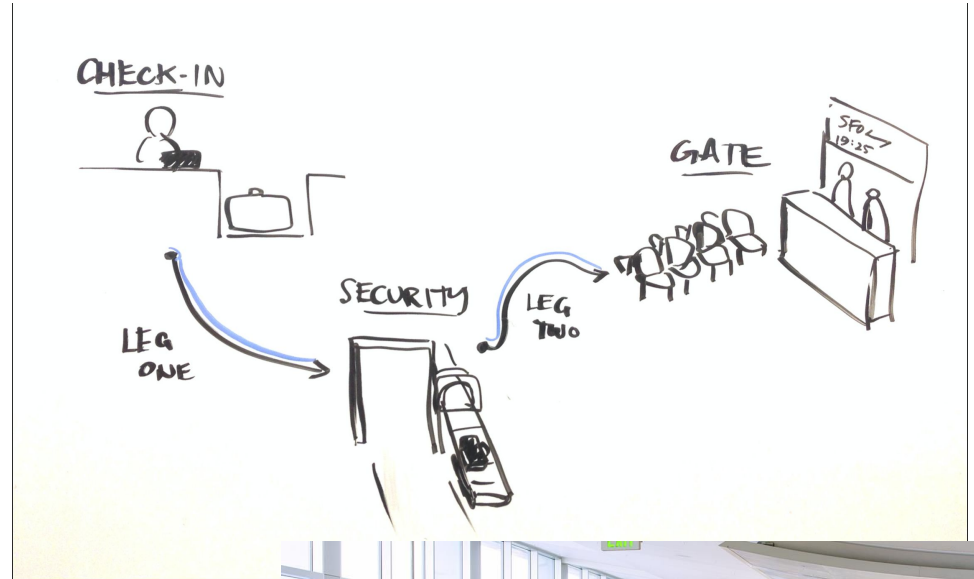
Airline program that pairs passenger needing assistance with another passenger willing to help.

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.

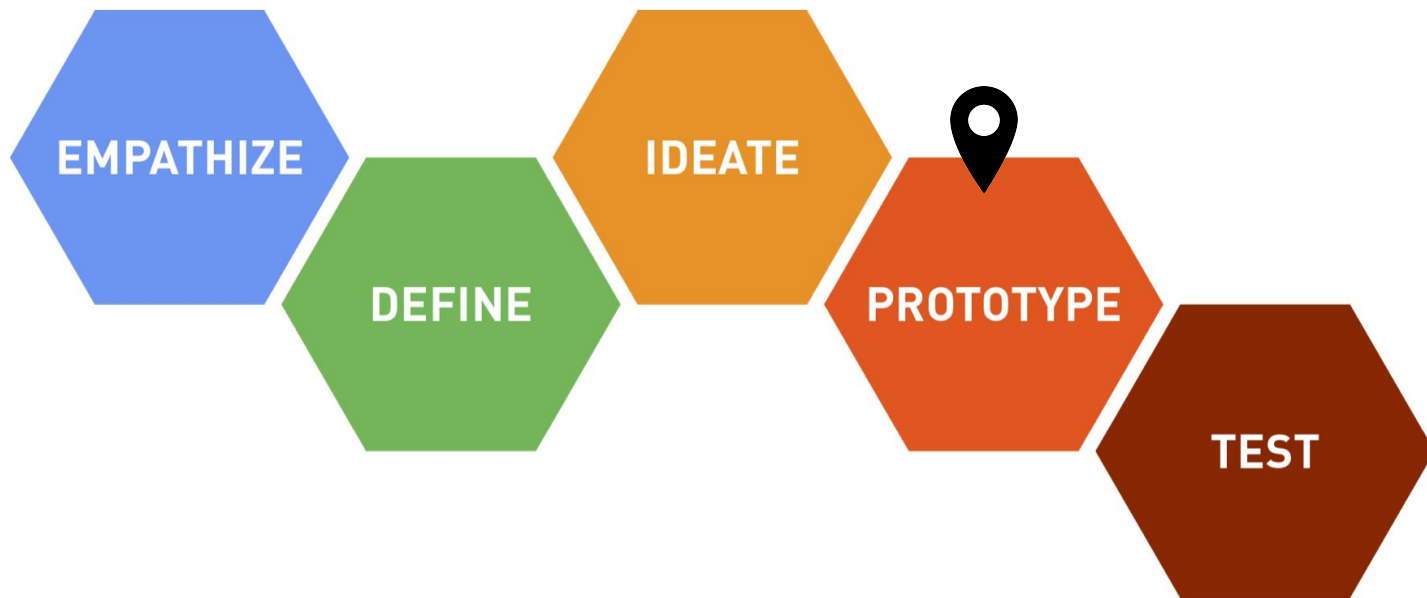


Take care of yourself.

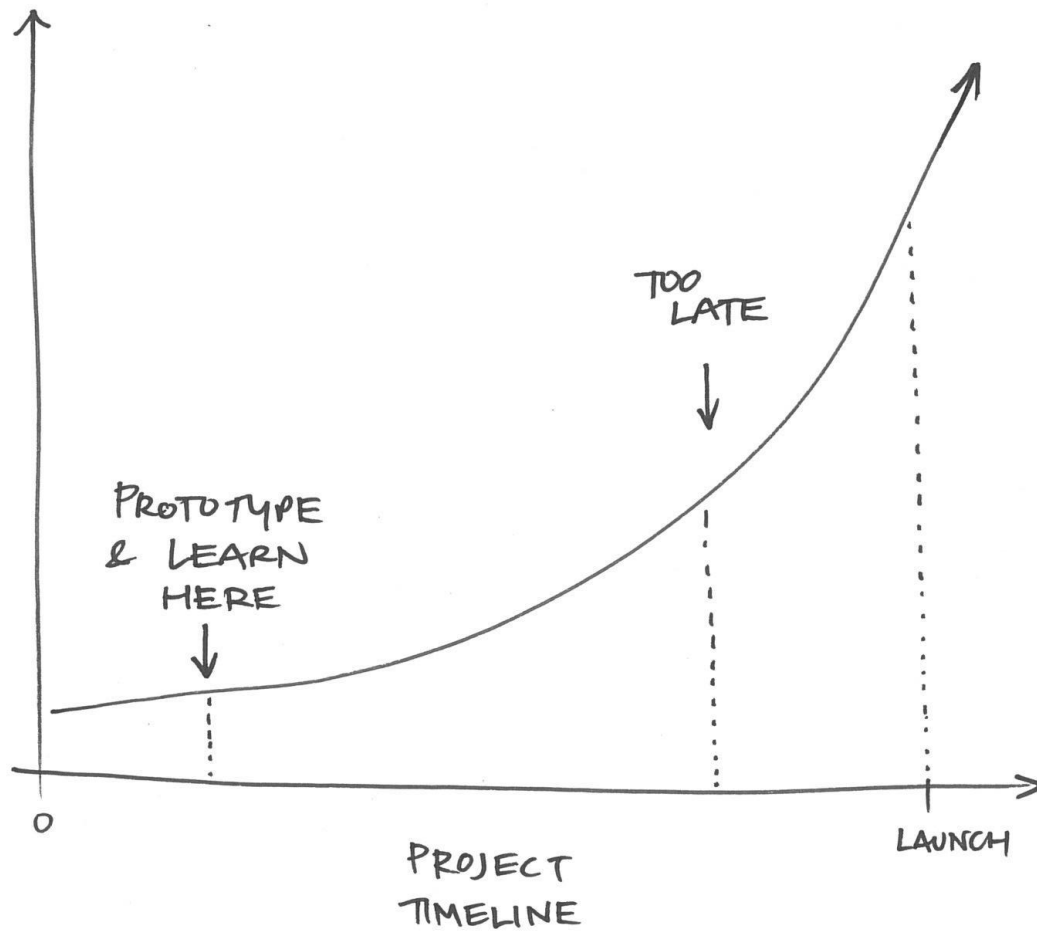
Come back in 10 min

BREAK

Human-Centered Design Sprint



\$ 🕒
COST OF
AN ERROR



Prototype to ideate

(Build to think)

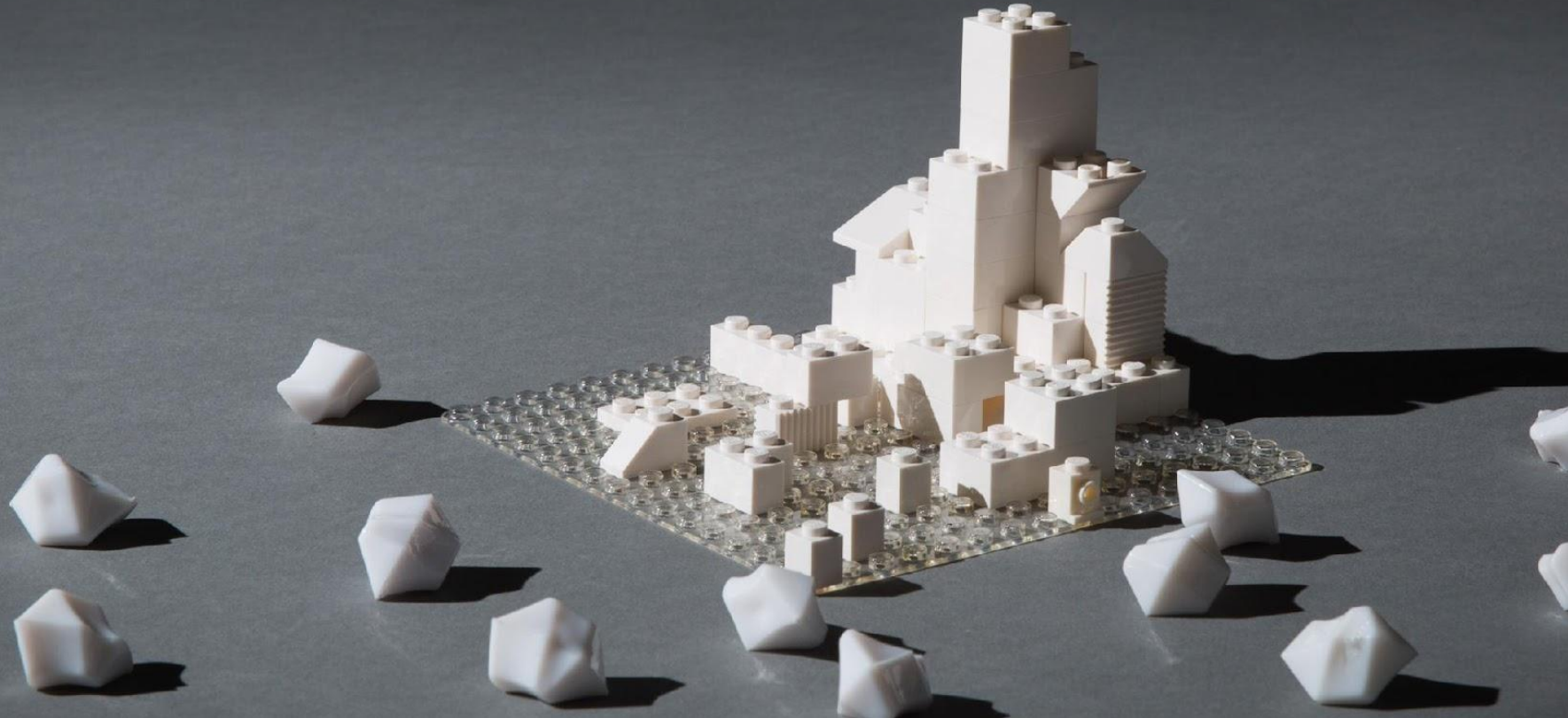


Prototype before
you are ready

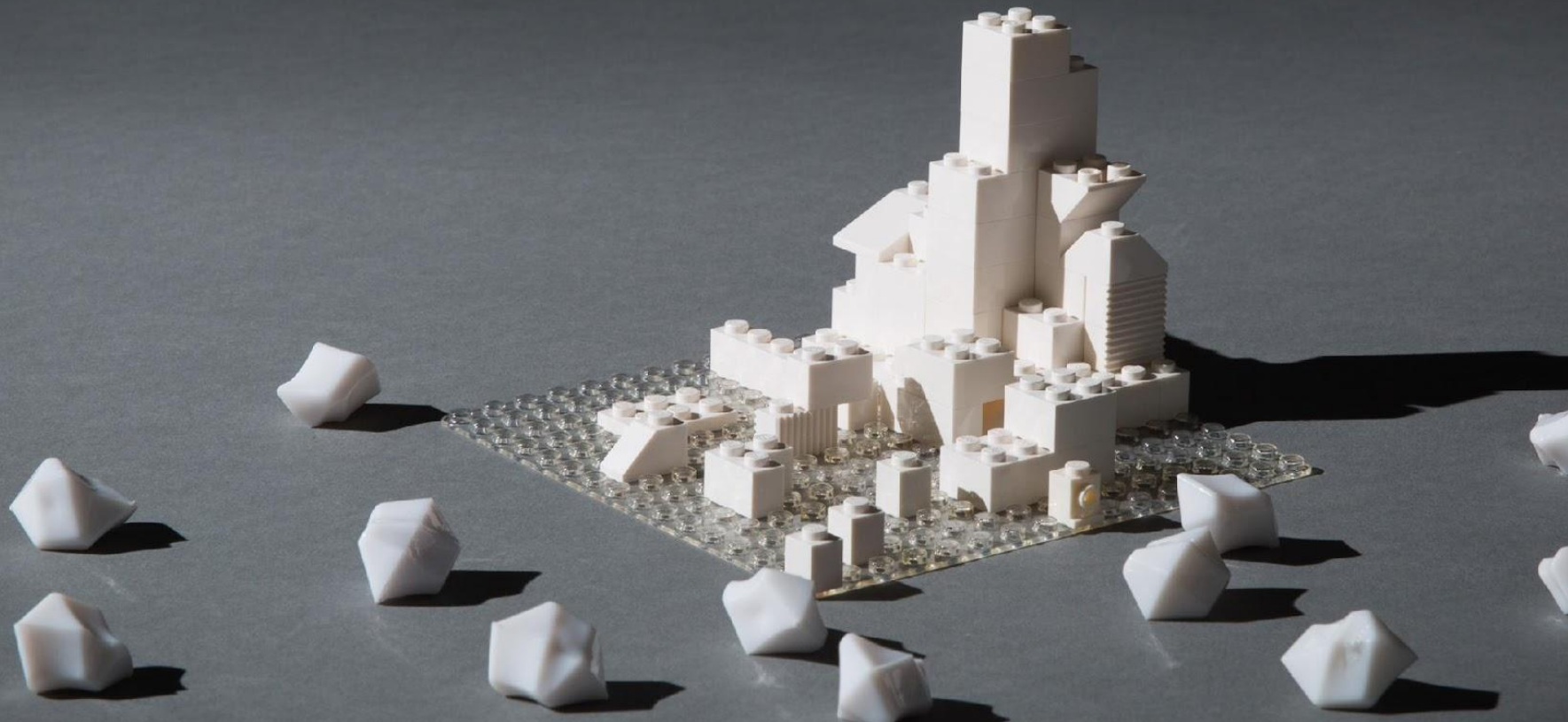




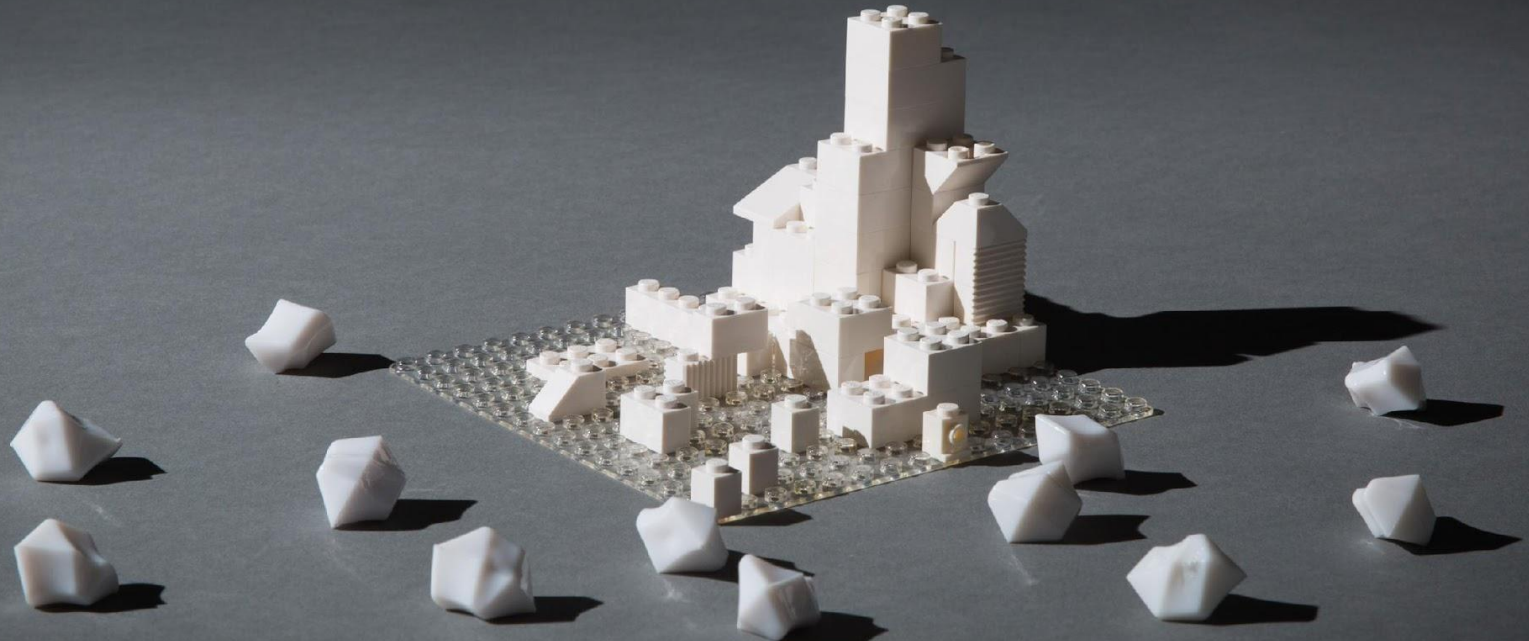
Tourism on the moon



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?

CONCEPT

EFFECT

**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?**



PARK(ing) Day © Rebar





1) Select one question or assumption

Questions you have, esp about behavior

- How much information is too much information?
- How much time can we expect them to dedicate between sessions?
- Are they comfortable using Mural? Or Google docs?
- Can we send pre-work and do they have enough context to complete it?
-

Assumptions you want to test

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-

1) Select one question or assumption

Questions you have, esp about behavior

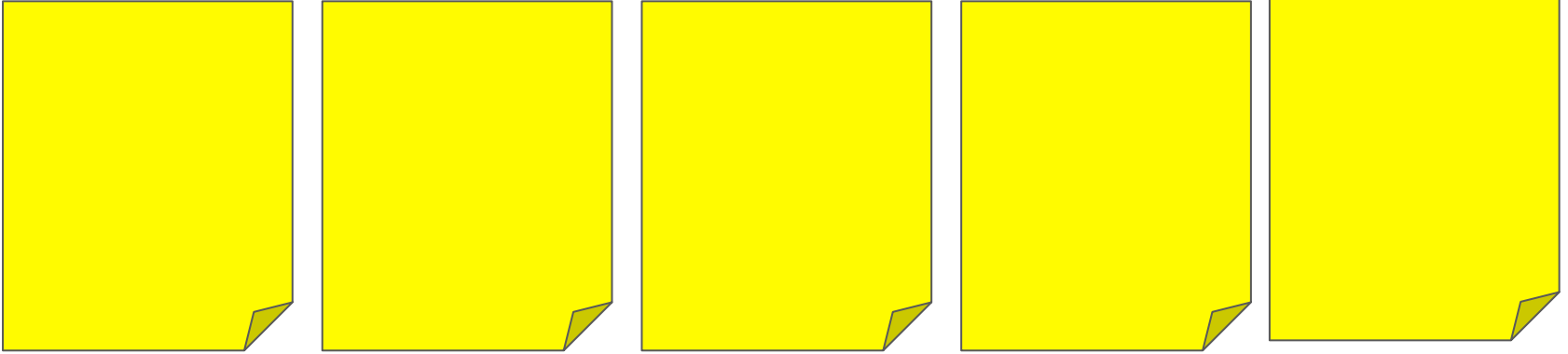
- How much information is too much information?
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Assumptions you want to test

- They are open to doing additional work between sessions
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- They are eager to learn and are not just taking the workshop for credit/affiliation
-

2) How could you test that in the coming week?

2) How could you test that in the coming week?

The image shows five identical yellow sticky notes arranged horizontally. Each note is rectangular with a thin black border and a small triangular tab at the bottom right corner, giving it a 3D effect. The notes are currently blank, intended for the user to write down their testing ideas for the coming week.



Case Study

QUESTIONS?

ASSUMPTIONS?

**How might we increase
percentage of wealth
advisors**

(at large financial institutions with
internal philanthropy units)

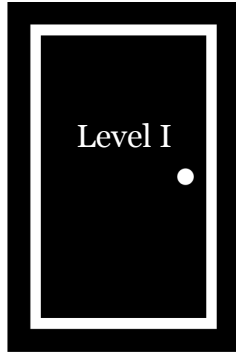
**who launch philanthropy
planning processes with high
net worth clients?**

Ethnography conversation with individual advisors & financial institution's philanthropy units



Experiment Expeditions

Select the level you want to explore:



Help clients with
what problem to solve

- Define values
- Develop guidelines on giving amount
- Determine appropriate giving vehicle



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



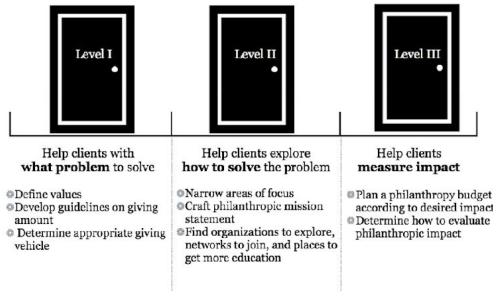
Help clients
measure impact

- Plan a philanthropy budget according to desired impact
- Determine how to evaluate philanthropic impact

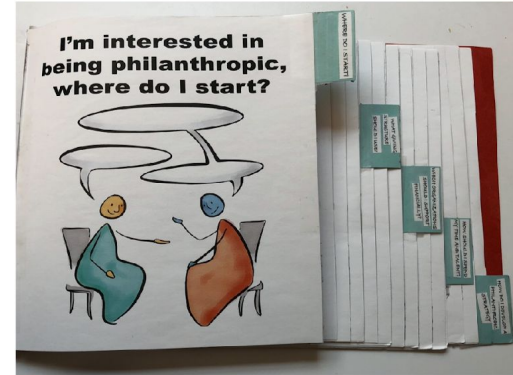
Prototype Iterations

Prototype 1&2

Select the level you want to explore:



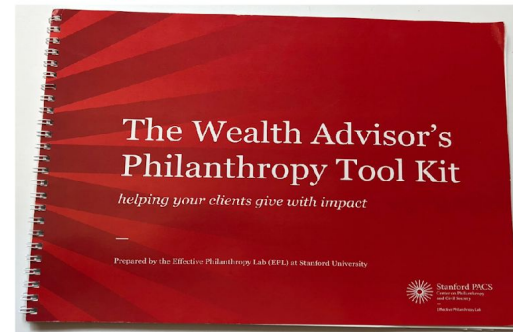
Prototype 5



Prototype 3&4



Prototype 6



Testing with many



Testing with many...



Co-creating with...



**Testing and Co-creating
with a partner**

The Wealth Advisor's Philanthropy Tool Kit

Helping your clients give with impact.

Prepared by the Effective Philanthropy Lab
(EPL) at Stanford University



Stanford PACS
Center on Philanthropy
and Civil Society
—
Effective Philanthropy Lab

OVERVIEW

WHERE TO START?

LOREM IPSUM

LOREM IPSUM

LOREM IPSUM

LOREM IPSUM

TABLE OF CONTENTS

IF I'M INTERESTED IN BEING PHILANTHROPE, WHERE DO I START?

- 3 Clarify values & motivators
- 7 Narrow focus
- 11 Involve others

WHAT GIVING STRUCTURE SHOULD I USE?

- 17 Determine giving amount
- 19 Determine giving timeline
- 23 Select giving vehicles

WHICH ORGANIZATIONS SHOULD I SUPPORT FINANCIALLY?

- 29 Research organizations
- 33 Perform due diligence
- 35 Learn how to say "No"

HOW SHOULD I INVEST MY TIME AND TALENT?

- 41 Find volunteering opportunities
- 43 Vet non-profit board opportunities

HOW DO I DEVELOP A PHILANTHROPIC STRATEGY?

- 49 Charting impact
- 53 Develop philanthropic strategy

OVERVIEW

WHERE TO START?

LOREM IPSUM

LOREM IPSUM

LOREM IPSUM

LOREM IPSUM

Testing with the sector

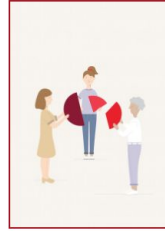


**Feedback from 10 banks
and
3 donor advised funds**



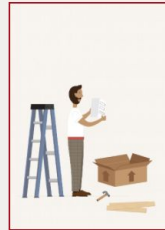
How do you find your focus areas?

- 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.

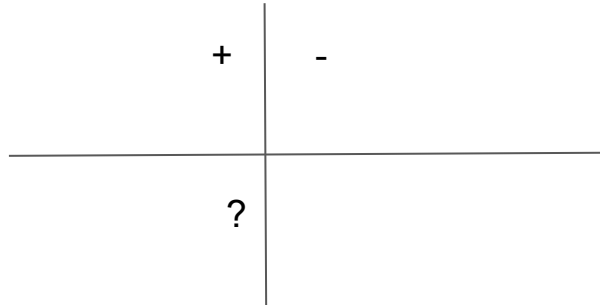
Have stakeholders “deploy” the prototype.

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.

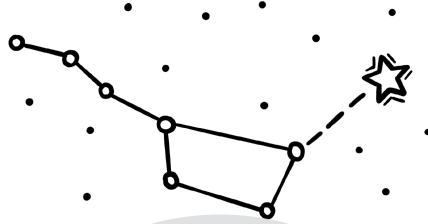
4 minutes per partner



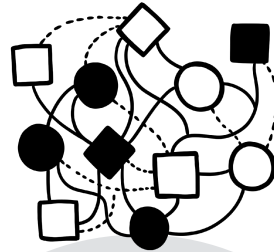
What are some key behavior(s)?



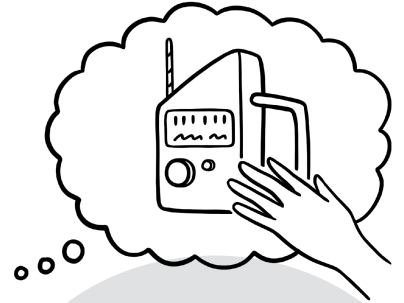
**Understand
people deeply**



**Gain Insights to
Discover New
Possibilities**



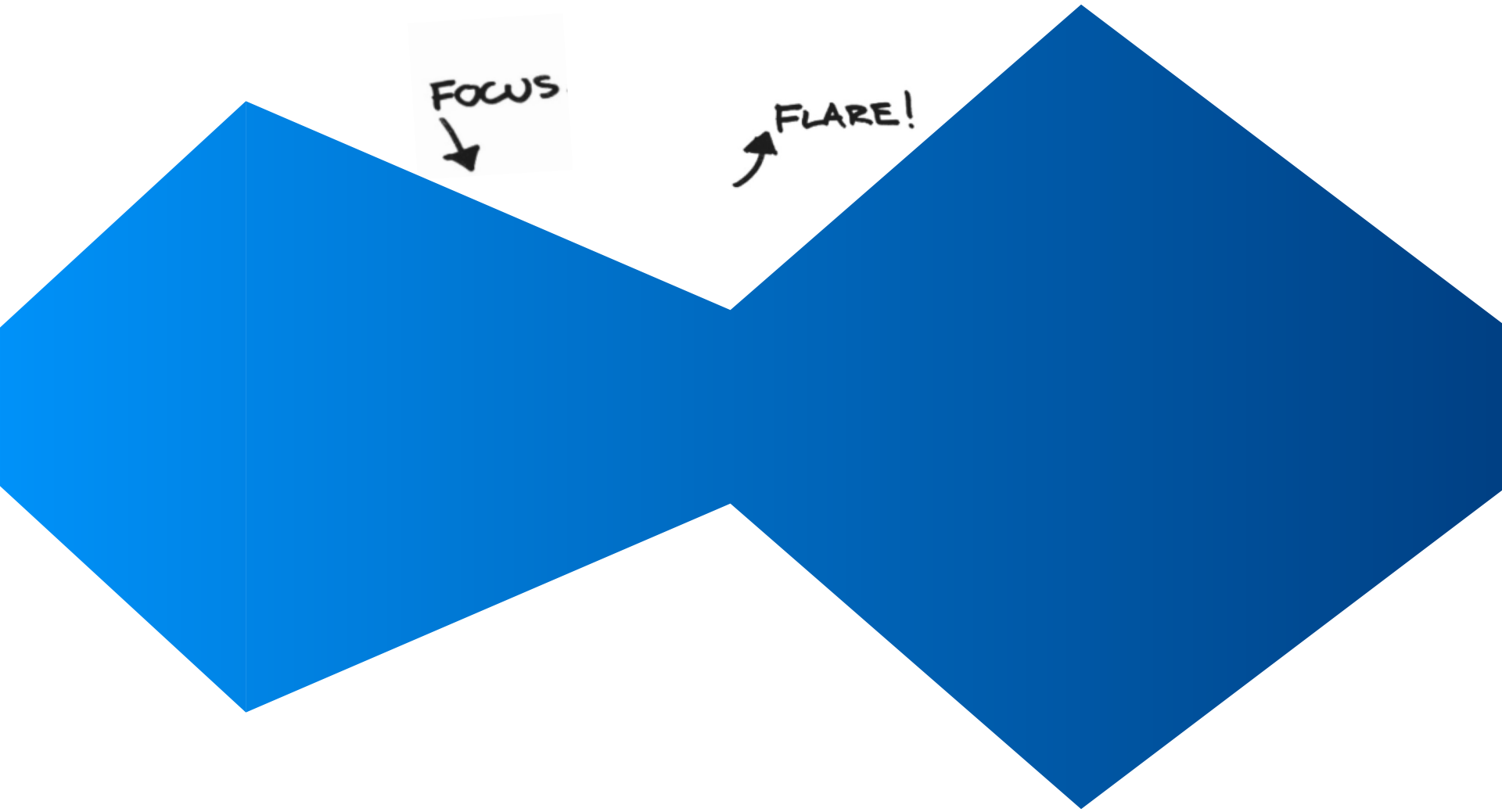
**Be Generative
Before Deciding**



**Make Ideas
Tangible**

FOCUS
↓

↑
FLARE!



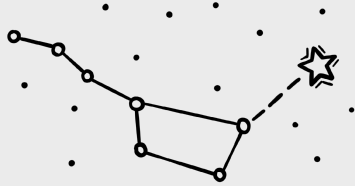


STORY OF YOUR NAME

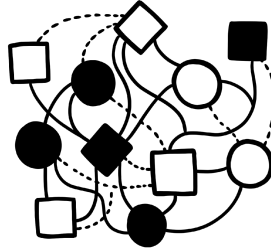
DESIGN PRACTICES



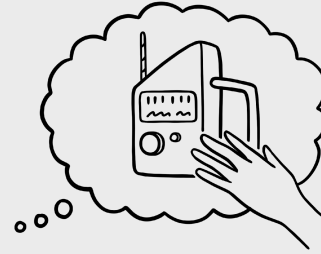
**Understand
people
deeply**



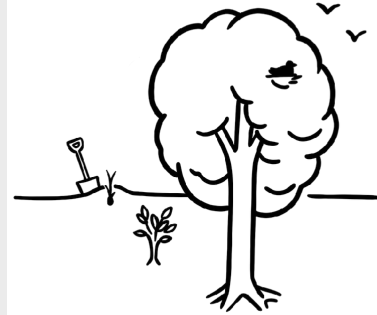
**Gain insight to
discover new
possibilities**



**Generate ideas
before
deciding**



**Prototype
before
investing**



**Pay attention to
downstream
outcomes**

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?

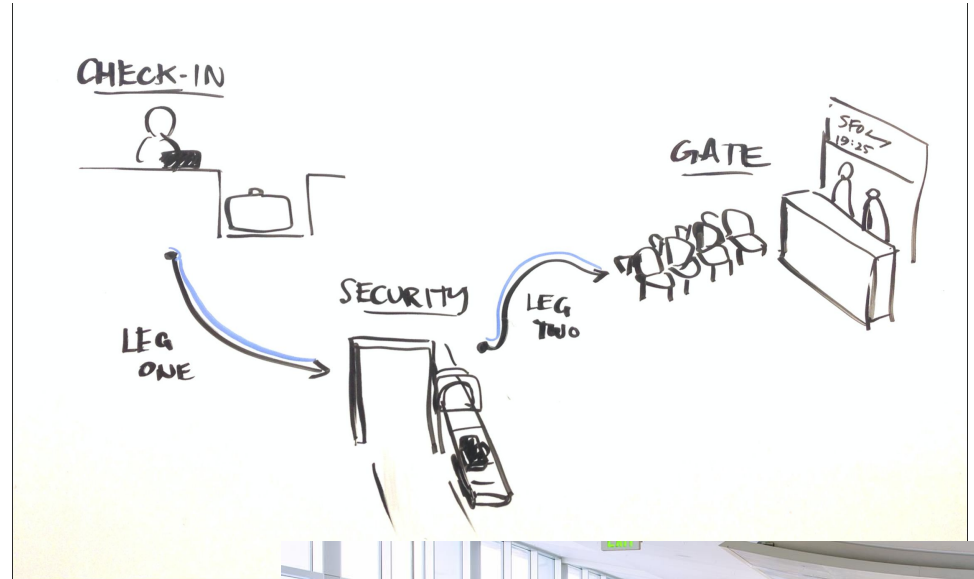
Airline program that pairs passenger needing assistance with another passenger willing to help.

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 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?

(If online, how will you set the scene to put people into a more “experiential” mode?)

What question or assumption are you testing?

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

What artifacts are you using?

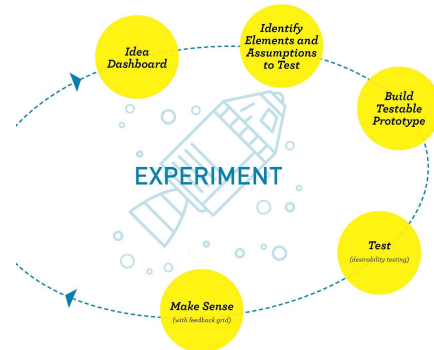
What physical/digital thing are you sharing/sending/showing your tester?

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

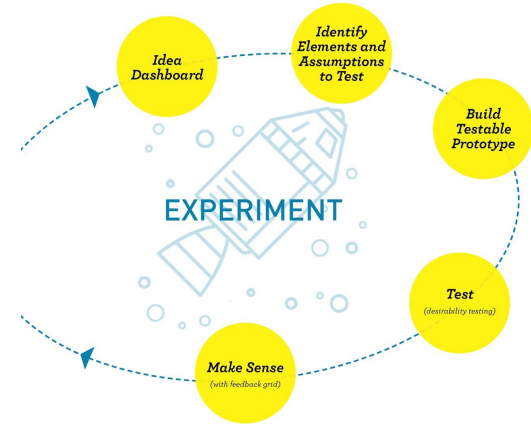
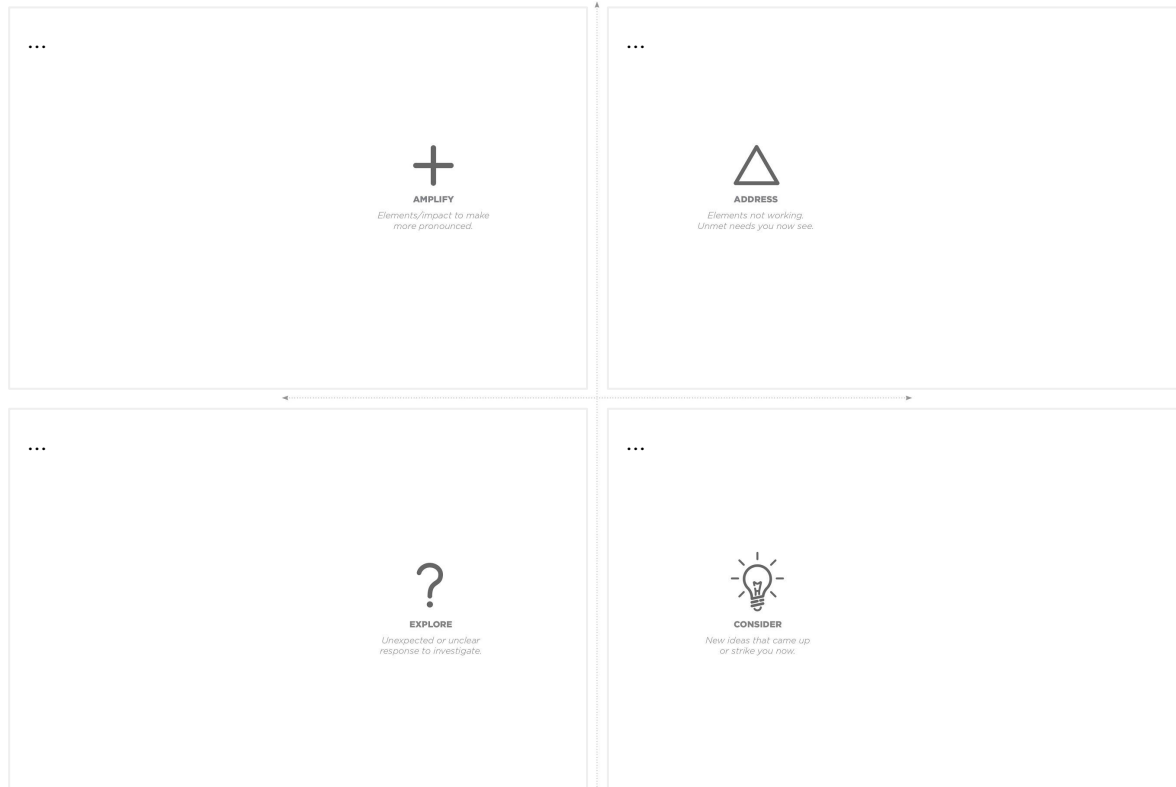
Who is leading the testing?
Who is capturing the feedback?

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

Round 1: Nadia lead, Thomas capture/follow-up
Round 2:



TESTING FEEDBACK (Idea 1)



TESTING APPROACH

Greet and set-up minimal context

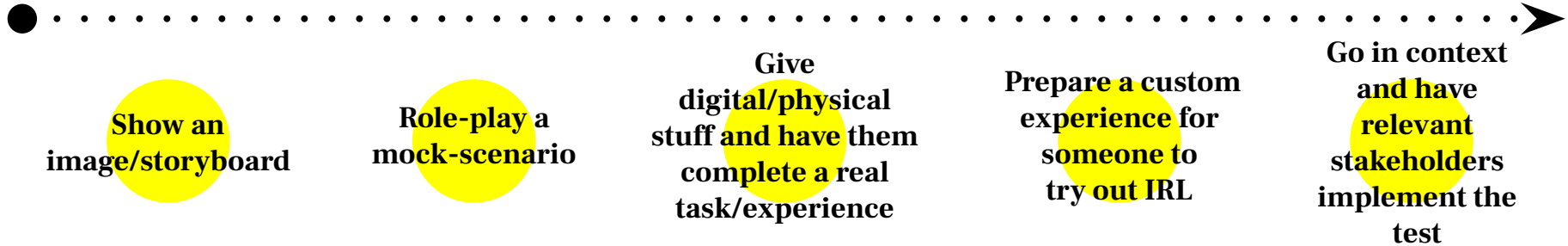
Create the experience. (Commit to the bit.)

Observe and capture notes (or record).

Follow-up with conversation.

(Ask about what happened and how it felt.)

AIM FOR EXPERIENTIAL



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.

ASK YOURSELF

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)?

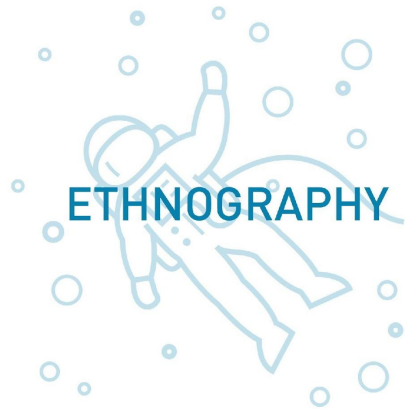
Create ways for wealth advisors to support their client's philanthropic planning process

WHO are you aiming to affect?

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

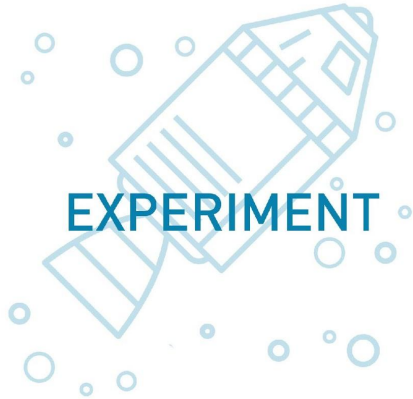
QUESTIONS you aim to answer in this expedition

- **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?

1

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:

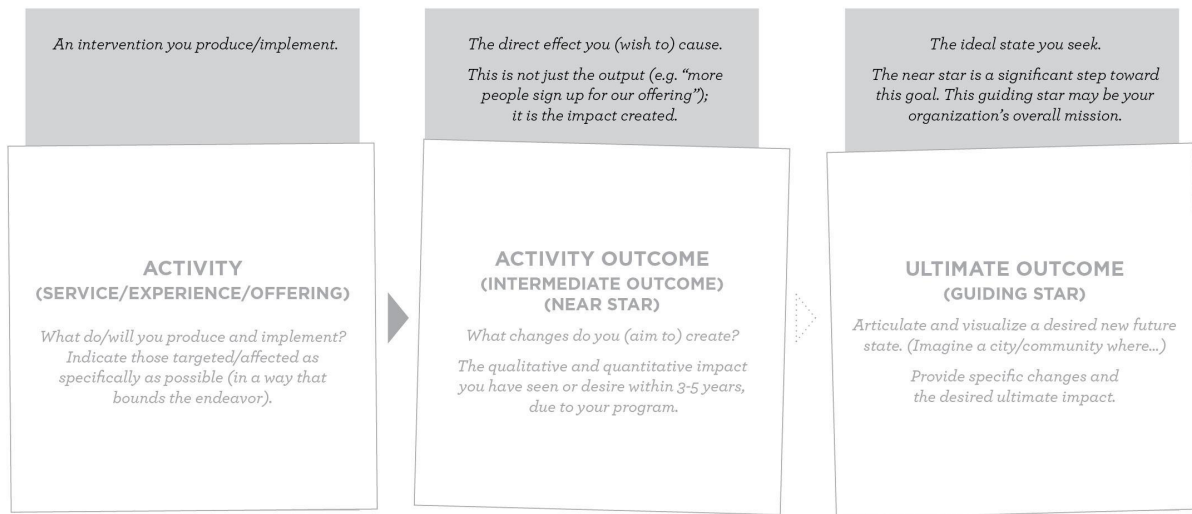
- a. Existing; needs to be evaluated and iterated or substantially redesigned (e.g., it is not achieving the desired outcomes), or
- b. Not existing; it needs to be created.

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.



- Supported
- Challenged
- Reassured
- Validated
- Challenged
- Instigated
- Agitated
- Impassioned
- Woored

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