

FOR THE

GENERAL

CONYNG

HOW TO USE THIS WORKBOOK

*Design Thinking is a set of mindsets and skillsets that anyone **can** and **should** use to **examine** and **understand** the challenges they're facing and to drive better **ideas** and launch more **experiments** into the world.*

In the next pages you'll get an overview of the Five Phases of the design process, the Three Modes of design thinking and enough knowledge to be able to start trying these skills on your current projects.

If you run into trouble, don't panic! Drop us a line at [Hello@TheDesignGym.com](mailto>Hello@TheDesignGym.com) We're here to help!



THE DESIGN GYM IS ABOUT
EMPOWERING PEOPLE WITH
THE TOOLS TO CREATE
CHANGE.



THE BEST WAY TO **LEARN** IS BY
DOING, WORKING ON **REAL**
PROBLEMS IN REAL TIME.



THIS TYPE OF **DESIGN** IS:

CREATIVE PROBLEM SOLVING
// A POWERFUL TOOL FOR
SOLVING ALL KINDS OF
PROBLEMS // SOMETHING
ANYONE CAN LEARN

**Design isn't about Photoshop or marker skills. It's about thinking.*



DESIGN IS PROCESS DRIVEN,
AND HAPPENS IN FIVE PHASES,
LIKE THIS:

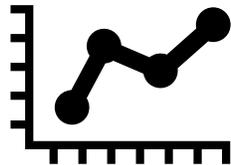


THE FIVE PHASES



EXAMINE

Dig into the problem. Look at the history, the context, the objects, and (most importantly) the people involved.



UNDERSTAND

Go deeper and find patterns. Establish open questions to build on.



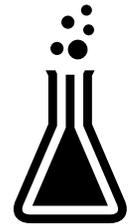
IDEATE

Have lots of ideas, good and bad. Don't stop at the obvious or the impossible.



EXPERIMENT

Try some things out. Make some things. Fail cheap and fast.



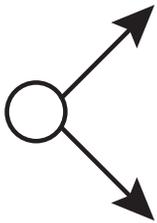
DISTIL

Strip your solution down to the essentials and tell the story to others.

**It's a journey and it's good to have a plan. Each phase change is a great place to stop and reflect.*

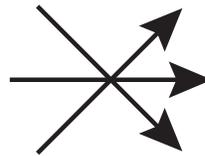


THERE ARE THREE MODES



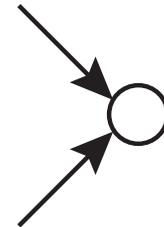
OPEN

Go wide! Opening is for divergent thinking. When we are opening, we're not closing. It's not about good ideas or bad ideas, it's about getting started and pushing the boundaries.



EXPLORE

When we have opened... Well, there's lots to dig into. Explore by combining and building on what you've opened. Great insights and ideas can come from making those connections.



CLOSE

Closing is the time for convergent thinking. Organize your thoughts. Decide what explorations were fruitful and which were less so. Choose the best ideas and information and move forward.

**You can't open and close at the same time.*

***If an important point comes up but it's not the right time, capture it and get back to it when it **is** the right time.*



HOW TO OPEN

Get the best information in the room

STAND UP AND WARM UP

Getting yourself and your team on their feet can be a great way to get the right energy into the room. Warm ups can include generating ideas or drawing the problem.

SHARED HISTORY

How did we get here? What is our plan? What do we want to get to? Establish and align on a timeline to help orient your work.

WATCH A VIDEO

TED talks aren't cheating...we all love them and they can help get people into the right mindset.

GROUND RULES

Making sure everyone is on the same page is important. Generate and collate everyone's best meeting experiences. Find the common threads... and agree to do those things!

VISUAL-SPATIAL AGENDA

Arrange areas, clearly labeled, for sections of the agenda or places where ideas and insights will be captured.

IMAGES AND OBJECTS

The internet is not enough. Paper your walls with stimulus from your user research or your problem set. Objects and artifacts!



HOW TO EXPLORE

Stir the pot and mix up ideas

SORT IDEAS

Get the team to move items into piles or spectrums: Good, better, best? Crazy, crazy awesome?

CONSTELLATE (FRANKEN-IDEATE)

Mix ideas, concepts and methods improvisationally. Spark new ideas if possible.

BUILD (YES, AND)

Take ideas and build on them - what other ways can this work? How can we enhance it?

CLUSTERS AND TENSIONS

Cluster ideas and concepts. Name the clusters. What are the tensions between them?



HOW TO CLOSE

Land the plane...start early!

INVOKING THE AGENDA

Make sure people know how much time there is and where they have to get to...and that they have to leave with Clear Next Actions.

USING YOUR FEET

Make areas for the 2-3 main areas of focus... let people choose their teams with their feet and focus on their chosen issue

VOTING

With dots or sticky strips, give your team 2-3 votes and get a visual read on the top choices

ROUND-ROBIN PITCHES

Get people to pitch out their top concepts. Time box the proceedings and then vote or build on the results. Presenting consolidates people's understanding of the idea.



MINDSET

PREP PREP
DREP!

PLAM
DUMB!

HAVE SEVERAL
PEOPLE CAPTURE

FACTS
EMOTIONS
?



ARTIFACTS

JOURNEY
MAPS

INDEX CARDS
+ SHARPIE

(CAN MOVE AROUND)
PHYSICAL/TACTICAL

PERSONAS

PITFALLS

QUALITY OF
QUESTIONS

IRRELEVANT
NOTES

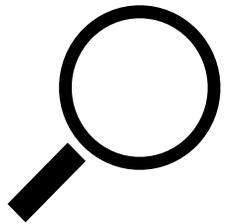
GETTING OFF
TRACK IN
INTERVIEWS

HOW TO CLOSE

JOURNEY
MAPS

PHYSICALLY
MOVING
PAPER
AROUND.

PERSONAS



EXAMINE



NOTES AND STICKIES

EXAMINE

MEET THE WORLD

MINDSET:

Cast the widest net possible in the time you have. Dig deep, follow leads, meet everyone. Ask lots of questions and listen more than you speak.

PITFALLS:

Asking for too much or too little information - or the wrong kind. Prototype research in order to make sure you use time well.

HOW TO OPEN:

Visit places where your problem exists. Go where the people and situations are to capture inspiration and information.

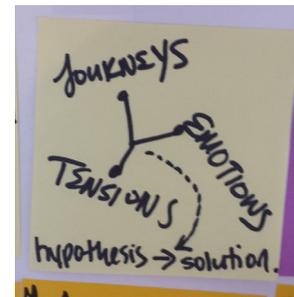
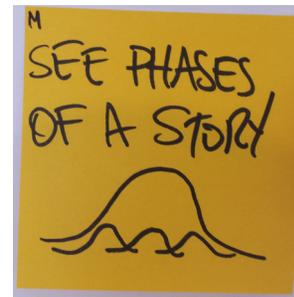
ARTIFACTS:

- » *Research plans or calendars*
- » *Screeners for user qualification*
- » *Person boards: Visual summaries of people or types of people you spoke with*
- » *Journey maps: A user or customer's pathway through a system*
- » *Inventories of experience*
- » *Benchmarks of existing solutions*
- » *Interviews with all potential stakeholders*

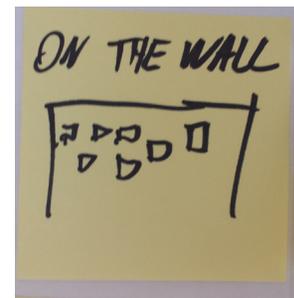
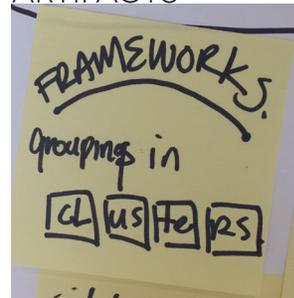
HOW TO CLOSE:

Pull out the top stories from all the research and display it visually. Confirm there are no major gaps in your research.

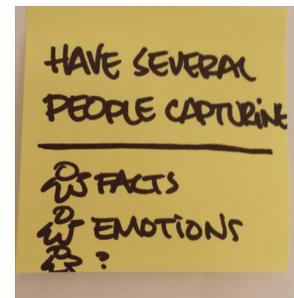
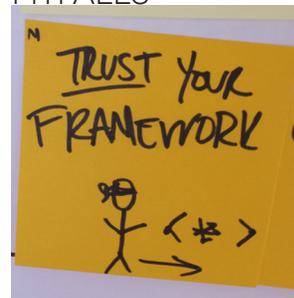
MINDSET



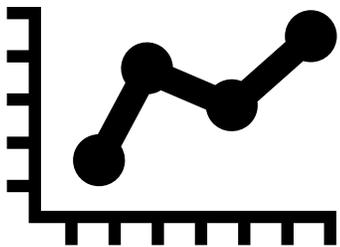
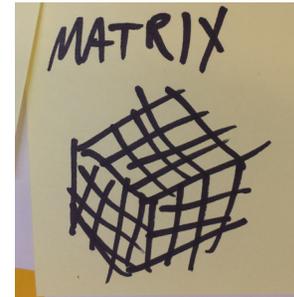
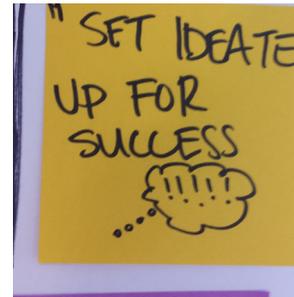
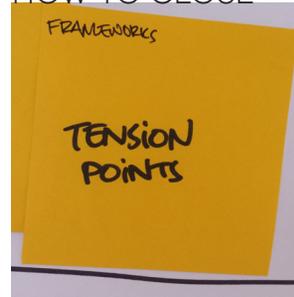
ARTIFACTS



PITFALLS



HOW TO CLOSE



UNDERSTAND



NOTES AND STICKIES

UNDERSTAND

CONNECT THE DOTS

MINDSET:

Data without structure isn't much help. By organizing, clustering and discovering themes, we create information and knowledge. Structured information creates insight.

PITFALLS:

Timebox your efforts and try many things - don't abandon your efforts without a visual summary of what you learned.

HOW TO OPEN:

Pull out tensions or patterns in the data. Try a framework and see what comes of it. Re-sort and map different dimensions of the problem - objects, needs, people, money, etc...

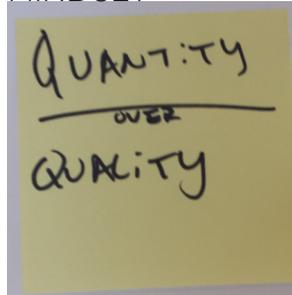
ARTIFACTS:

- » *Dumb Clusters: simple sorts of stories, experiences, or pain points heard during research*
- » *Smart Clusters: named clusters with relationships mapped and needs extracted*
- » *Frameworks: various ways of visually organizing the research data to highlight new learnings*
- » *Refined person boards*
- » *Insight statements: new learnings based on patterns realized during research*

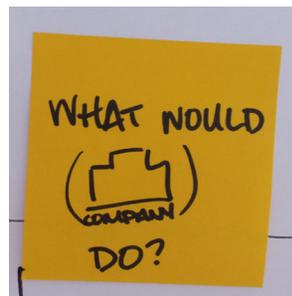
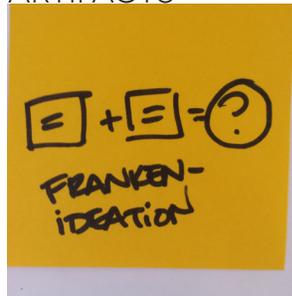
HOW TO CLOSE:

Take a step back and ask yourself if your findings are interesting and new. Dictate a clear, provocative insight statement to fuel ideation.

MINDSET



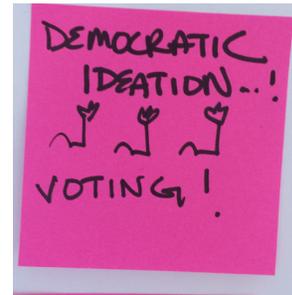
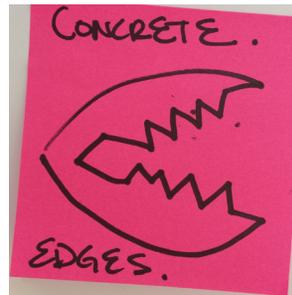
ARTIFACTS



PITFALLS



HOW TO CLOSE



IDEATE



NOTES AND STICKIES

IDEATE

HAVE LOTS OF IDEAS

MINDSET:

Accept that having bad ideas is part of the process. Bad ideas can end up inspiring something amazing. Shoot for quantity over quality. Accept wild ideas and critique later. Stay positive.

PITFALLS:

Not having a firm close in Understand makes it hard to start ideating. Having weak ideation prompts or bad facilitation will lead to low team energy and frustration.

HOW TO OPEN:

Set brainstorming rules and appoint a facilitator - it's a separate job. Have stimulus in the room - images, prompts, artifacts and information to inform ideation.

ARTIFACTS:

- » *The Rules of Ideation clearly displayed in ideation room*
- » *Variety of ideation prompts, generated collaboratively during or solo before the session*
- » *Ideas captured on sticky notes in headline form*
- » *Idea boards: deeper exploration of top ideas*
- » *Franken-Ideas: Random combinations of ideas that form to create larger concepts or strategies*

HOW TO CLOSE:

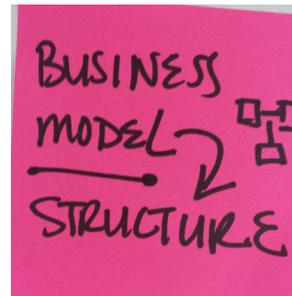
Sort ideas along relevant frameworks: short-term vs. long-term, impact vs. enthusiasm, or cost vs. benefit. Vote using stickers or sticky note strips.



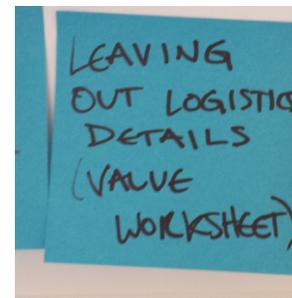
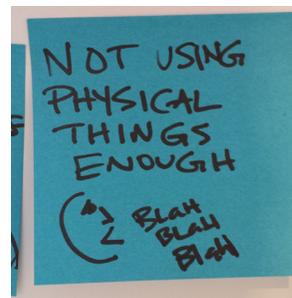
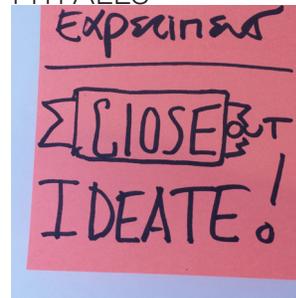
MINDSET



ARTIFACTS



PITFALLS



HOW TO CLOSE



EXPERIMENT



NOTES AND STICKIES

EXPERIMENT

MAKE IT REAL

MINDSET:

It's not about getting it right, it's about getting feedback and improving. Don't fall in love with your prototypes! Be open to criticism - the best learnings are there.

PITFALLS:

Not having a solid close during Ideate will lead to misalignment or overly abstract concepts. Talking over testing. Staying too high-level or abstract. Not doing all three types of prototypes.

HOW TO OPEN:

Use scenarios and storyboards to help think through the concepts. Try one prototype and get feedback, then revise or try another way of prototyping.

ARTIFACTS:

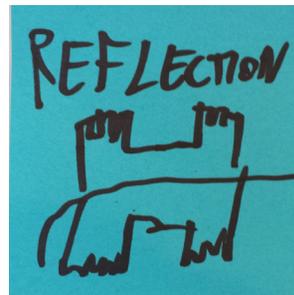
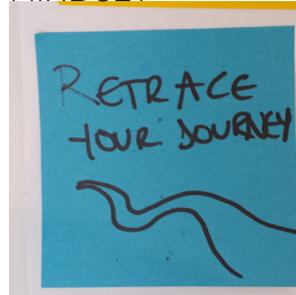
- » *Storyboards*
- » *Video prototypes: act out scenarios and re-watch them*
- » *Documented user and stakeholder feedback from prototypes*
- » *Scale prototypes*
- » *Business models and implementation prototypes*
- » *Photo records of prototype evolution from low to high fidelity*

HOW TO CLOSE:

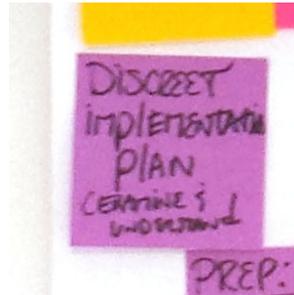
Share prototypes with users, experts, and stakeholders. Continue iterating in conjunction with feedback and learnings. Set a time limit or goal to meet.



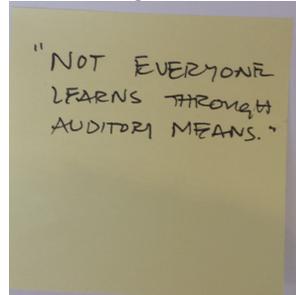
MINDSET



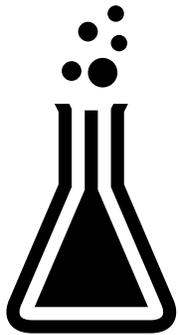
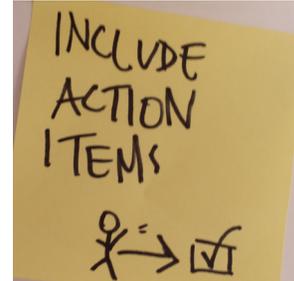
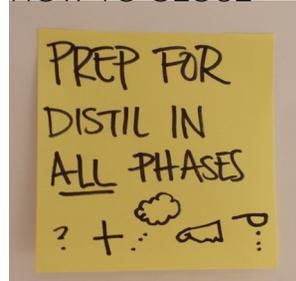
ARTIFACTS



PITFALLS



HOW TO CLOSE



DISTIL



NOTES AND STICKIES

DISTIL

BOIL IT DOWN

MINDSET:

Great ideas are a great start - but a great story helps people connect with your idea - and helps the idea to spread. Assess your audience in order to tell the story they want to hear, not the one you want to tell.

PITFALLS:

Forgetting the original brief or assignment and drifting too far - make sure you know why and put that first. Telling a story suited to just one learning style (ex. auditory, visual, kinesthetic).

HOW TO OPEN:

Reflect on the process so far and have each team member pitch their perspective. Spend time understanding your audience. Try multiple story lines and story types.

ARTIFACTS:

- » *Refined artifacts from earlier phases*
- » *Storyboards and story arcs*
- » *Prototyped stories and visuals*
- » *Documented feedback from stakeholders*
- » *Physical reminders - a flyer, object or token of the presentation*
- » *A strong emotional reaction to the problem and solution(s)*

HOW TO CLOSE:

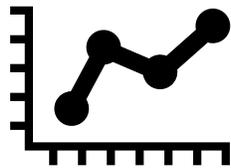
Prepare for Distil in all phases - retell your stories and document your phase journey. Fill the room with your journey. Rehearse! Have a clear call to action and next steps.

PHASES & MODES

Open and Close each phase



EXAMINE



UNDERSTAND



IDEATE



EXPERIMENT



DISTIL



Remember that the open/explore/close modes work at every phase. They're fractal.

Open: problem statement, establishing a shared history or knowledge base

Explore: generation of options, solutions or directions

Close: clustering or organization, prioritization and selection of next actions

Keep the group moving fluidly through these energy states as they flow through the phases.



WHAT'S NEXT?

*The Design Thinking process can take an hour or it can take weeks and months. It's up to you to **right-size** the phases and modes to your needs, your timelines and budgets.*

*The best way is to just **start using these tools** and to show, don't tell. Forgiveness over permission works great!*

If you want to us to help you build these capabilities across your team or organization contact us at [Hello@TheDesignGym.com](mailto>Hello@TheDesignGym.com)

