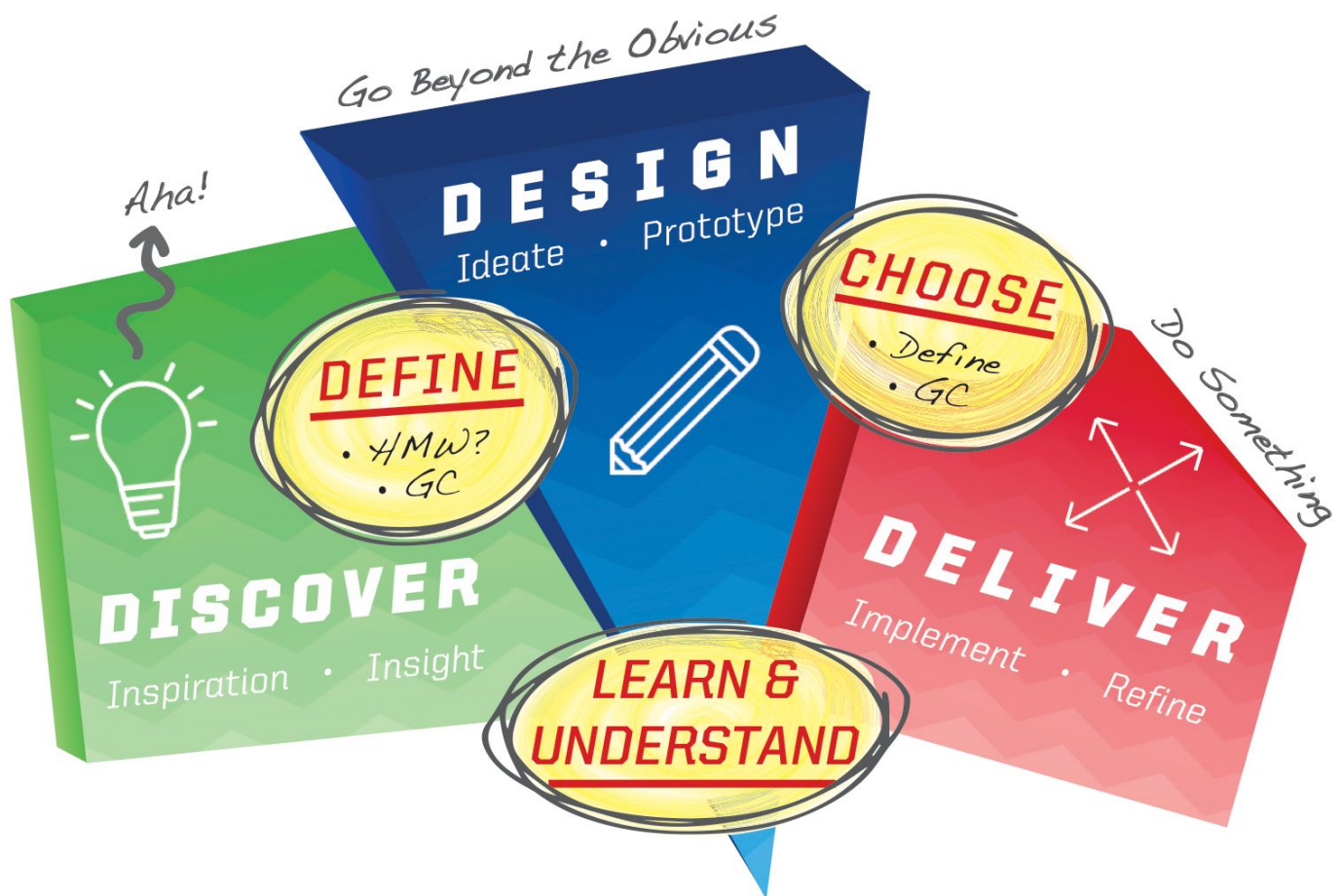# SLP 3D Design Thinking Methodology
The Essential Playbook

USING THE ESSENTIAL PLAYBOOK

Get ready…you're about to design! The Essential Playbook is specifically designed for both experienced and new users who have a design challenge that can likely be tackled in a relatively short amount of time, or has a relatively small scope. Many of the methods you'll find in this playbook should look familiar, and every single one isn't necessarily required. You might pick and choose single methods to complete in a PLC, or set aside an entire day to work your way through the entire book. Do what works for you and your team. Every step forward is an important one.

For each method in the playbook, you'll find a number of elements on each page to help you along the way, including:

What is it
This section will provide a brief overview of what each method is designed to accomplish.

Why we do it
This section indicates the importance of the method, and how it will ultimately support your team as they engage in design.

How we do it
This provides step-by-step directions on how to use the method.

See it in action
This section links to samples or videos that will help you through using or facilitating the method.

There is no failure here, only opportunities for growth. Take risks. Create. Innovate today to end up in a better place tomorrow. Ready, set, go!

THE 3D DESIGN MINDSETS

When designing, we do our best to adhere to the following mindsets. The team's ability to uphold these mindsets not only leads to a more productive design session, but tends to lead to a stronger outcome overall.

Tap into your creative confidence.
Believe in your capacity to create positive change and have the courage to take action. This allows us to make better choices, see new possibilities, collaborate with others, and approach challenges with courage. (David Kelley, founder of IDEO)

Learn from failure.
Fear of failure can hold us back from trying all sorts of things. But if we accept that failure is a part of learning, we can remain confident that setbacks actually allow us to move forward. Failing early allows us to succeed sooner.

Embrace ambiguity.
Formulas and algorithms drive us to the obvious. Instead, give yourself the permission to explore lots of different possibilities so that the right answer can reveal itself. There are always more ideas. (Patrice Martin, IDEO)

Be urgently optimistic.
Focus on what could be, rather than the countless obstacles that may get in the way. Every problem is solvable – all we need is a reasonable hope of success.

Iterate, iterate, iterate.
We know we won't get it right the first time, but every iteration steers us closer to the best iteration faster. Get feedback from the people you are designing for along the way, rather than waiting for the perfect solution.

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DISCOVER
SPACE METHODS

The Discover Space helps us seek out inspiration, harness it, and begin to see the possibilities that design can offer us.

Initially, you'll find a method focused on garnering inspiration. There are countless places we can find our inspiration. Begin to see things differently. Rediscover the familiar. Turn problems into possibilities, and make the most of what's right in front of you. Don't let nagging problems in our system persist.

Next, you'll move into tools designed for gaining insight. In many ways, what makes design different from planning is a human-centered focus. Dig into the needs and desires of those you're designing for. Fully understand the context before jumping to conclusions about what you think is really needed. Insight is a key ingredient to human-centered design, and one that should almost never be skipped.

Inspiration

Harnessing that Aha! Moment

Insight

I Need, So That

Assets and Liabilities

The Good, The Bad, The Meh

Discover Space:
Harnessing that Aha! Moment

What it is

A method for capturing the inspiration all around us.

Why we do it

This method heightens our awareness. It allows us to see the vast number of opportunities we encounter each day for creating a better experience for our users, or innovating on existing systems. It's easy to take the way things are for granted, or wait for others to tackle the opportunity. In design, we hold a bias toward action and tackle it ourselves.

How we do it

1. Increase your mindfulness of the opportunities you encounter each day. Keep a list of things that bug you, or take a closer look at the routines you experience each day.
2. You are likely constantly generating ideas or thoughts internally. Write them down! Tell a friend! Don't let that thought get lost! That sketch on the back of a napkin or middle of the night notion might just be the next great invention.
3. Do something! Most people let those nagging problems or great ideas go. This playbook provides a tangible way to harness your creative energy and make a positive change.

Discover Space:
I Need, So That*

What it is

A way to quickly gain empathy for the customer that you are designing for.

Why we do it

To gain empathy, we want to put the needs of the people we're designing for first. Oftentimes, we get caught up in designing solutions that make things more convenient for us versus the end users of the experience. In addition to identifying emotional and functional needs, this method does a nice job of getting at how a solution makes the user's experience better.

How we do it

1. Create a T chart on a piece of chart paper or whiteboard. On one side, write "I Need," and write "So That" on the other side.
2. With the opportunity you are designing around in mind, ask everyone to think about the needs that the user might have. Think **only** about the experience of the user, not our personal experiences at this time. Use these needs to generate "I need...so that…" statements.
3. Provide an example if necessary: "I need to go to bed on time, so that I can wake up right away when my alarm goes off."
4. The "I Need" should match the "So That" on both sides of the T chart.

See it in action

Video example: Link here

*Adapted from © 2016 GoKart Labs. http://www.gokartlabs.com

Discover Space: Assets and Liabilities*

What it is

An exercise used to quickly capture the forces that might make our ideas better or worse. Assets are the elements in our current reality that are working for us, and that are leading us toward success. Liabilities are those elements in our current reality that are getting in the way. Both are important to consider.

Why we do it

Understanding the assets at hand for an organization is critically important as we want to make sure we're incorporating the best experiences into the solution we design. Just as importantly, we want to make sure we understand the barriers that our liabilities might bring and design solutions for those needs.

How we do it

1. Draw a T chart on a piece of chart paper or whiteboard. One headline is Assets, and the other headline is Liabilities.
2. Describe the meaning of assets and liabilities to the group. This method can incorporate one or all of the users' experiences (example: students, family, community AND staff or just the staff experience)
3. Have the group list off experiences or elements that make up our current reality and share why it is an asset or a liability. Use this insight when developing your How Might We.

See it in action

Video example: Link here

*Adapted from © 2016 GoKart Labs. http://www.gokartlabs.com

Discover Space:
The Good, The Bad, The Meh*

What it is

A method to evaluate the experience along your customer's journey.

Why we do it

This method simplifies the complex user journey by focusing on moments that matter the most to your customer. This method provides a chance to discuss how things are *really* going for your user. By going through this method, you'll be able to identify which areas can be leveraged and which areas we can redesign around.

How we do it

1. Identify 4-6 key parts of the customer's experience. Do your best to limit yourself to no more than 6 key parts or phases!
2. Along the top of a piece of chart paper or whiteboard, draw a smile (the good), straight (the meh), and sad (the bad) emoticons.
3. Along the left edge of the chart paper or whiteboard, write down the 4-6 key parts of the customer's experience that you want to focus on.
4. Draw lines in between each key part and emoticon to make a grid.
5. List out the different activities that *the customer* would say are good, bad, or meh within each key part of their experience. You may not fill out every box.
6. Look for areas that would be consider wins. Leverage these elements! Also, look for areas that could be improved upon. Use these insights when developing your How Might We.

See it in action
Video example: Link here

*Adapted from © 2016 GoKart Labs. http://www.gokartlabs.com

DEFINE
SPACE METHODS

The Define Space helps us narrow our focus to ensure our team is on the same page, and heading in the same direction. It's a critical step in scaling and scoping a design.

Comprised of two key methods, this space makes quick work of highlighting key leverage points, providing an end-in-view, and creating a collective vision that should inspire the team to move forward with commitment and purpose.

Define

Writing a HWM Question
Developing a Guiding Change

Define Space:
Writing a HMW Question*

What it is

A method for narrowing a design team's focus to a single or multiple key leverage points. Identifying these leverage points will ultimately serve as a jumping off point for generating creative solutions.

Why we do it

The Discover Space naturally brings our design very wide due to the amount of time and energy expended on gaining insight. Writing a HMW question aims to narrow our focus to key leverage points we can creatively design around.

How we do it

1. Synthesize major insights learned in the Discover Space. As a group or individual, you might generate a list of key takeaways or discuss major themes.
2. Begin to turn those key takeaways or themes into actionable questions. Use the frame of "How might we…" to highlight the opportunity in your question. At this point, don't get too caught up in wordsmithing. Simply generate several questions that might help tackle the opportunity at hand.
3. After several potential HMW questions have been generated, check them for scope. Is the question too broad in that it doesn't provide enough focus for the group? Is the question too narrow in that it already assumes a given solution? Rework any questions that might be too broad or too narrow.
4. As a group, settle on one to three HMW questions to guide the work, depending on time available to dedicate to the design.
5. If the group is struggling to come to a consensus on which questions to choose, use a simple voting system. For example, each person puts a dot or mark next to their top 2 questions, and whichever end up with the most dots will be the selected question.

See it in action
Video example: Link here

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Define Space: Developing a Guiding Change

What it is

A method to define the container or sandbox for the design by clearly outlining current context and reality, desired results, and constraints.

Why we do it

Adding clarity and definition to the design provides a framework for creativity. With clear outcomes in mind, and a clearly defined sandbox in which to work, designers are able to leverage their creative confidence, and see more potential opportunities.

How we do it

1. A guiding change can be informally sketched up on a piece of chart paper or whiteboard, or outlined more formally on our district provided document linked below. Select which method to use based on the scope of the design you're tackling. If you're sketching it out informally, draw a three column table with the headings Current Context and Reality, Desired Results, and Unacceptable Means.
2. Make sure the HMW question or questions your design team generated are either visible, or printed along the top of the guiding change.
3. Consider the HMW question at hand. Begin, in the first column, by generating key points related to the current environment, trends, or practices embedded in the HMW question. This should answer the "why" of your design. For further guidance, see the document linked below.
4. Next, in the middle column, create a picture of success if you were able to answer your HMW question. What would the desired results be? This should be the "what" of your design, and provide an end-in- view focus for the group. For further guidance, see the document linked below.
5. Finally, in the last column, highlight any unacceptable means. Unacceptable means outline the "not how" of a design – all the ways we *won't* answer our HMW question. These would be solutions that are not acceptable. They are the necessary constraints that fuel our creativity. For further guidance, see the document linked below.

See it in action

Formal guiding change document, with in-depth descriptors: Link here
Example video: Link here

DESIGN
SPACE METHODS

The Design Space provides us with a place to channel the creative energy we collected in discovery. Here we turn insights into ideas, and ideas into solutions.

The first set of methods support ideation. Use these tools to open your mind and let your imagination run free. Keep pushing for more. Build off one another. Give yourself the freedom to go beyond the obvious. Ideation methods also support the organization and exploration of the countless ideas you've generated. The most promising ideas will rise to the top, and pieces will begin to fall into place.

From ideation comes prototyping, which helps bring your ideas to life. Prototypes will begin rough and become more refined. The important thing is to turn thoughts into things. Make your concepts shareable and real so feedback can get gathered, and you can fail forward with each new iteration.

Your best prototypes need to be tested or given feedback, and we offer you a variety of tools for both assessing and gathering feedback on them. Taking feedback into consideration, eventually you'll choose the point at which your most promising prototype is ready for implementation.

Ideate

Norms for Ideation
Ideation

Prototype

Moments (or Chapters)
Rapid Prototyping
The Pitch
I Like, I Wish, I Wonder

Design Space: Norms for Ideation*

What it is

Use this at the beginning of the Design Space to generate as many ideas as possible. While not all ideas will be used, they will build off one another and lead to further inspiration.

Why we do it

Generating as many ideas as possible will kick start creative design. Ideation can be thought of as unstructured, but it requires a lot of discipline and focus. Having norms will make this time more productive.

How we do it

1. Start with your clearly defined opportunity, HMW, and guiding change.
2. Share the norms for ideation:
   - Defer judgement – there are NO bad ideas at this point
   - Encourage wild ideas – even if it's not realistic, it might spark another idea that is
   - Build on each other's ideas – think "yes, and…"
   - Stay focused on the topic – keep your defined challenge in mind
   - Have one conversation at a time – all ideas need to be heard and valued
   - Be visual – don't limit yourself to just writing your ideas – simple sketches sometimes say more
   - Go for quantity – the best way to find a good idea is to come up with lots of ideas
3. Start the ideation process.

*Adapted adapted from © 2012 IDEo LLC. All rights reserved. http://designthinkingforeducators.com/

Design Space: Ideation*

What it is

A method to kickstart brainstorming ideas prior to prototyping potential solutions.

Why we do it

Ideating will help you generate loads of ideas without any constraints. At this point, there is NO bad idea! Quantity will increase the likelihood of generating ideas that have the best chance of working.

How we do it

1. Pick a space where everyone is comfortable, can move freely, and there is sufficient wall space. Make sure that you have all the necessary tools handy – markers and post-it notes.
2. It's best to have someone serve as facilitator and not participate in the ideation process. If you all want to participate, choose someone else to join your group for this portion, or designate someone within the group to serve as facilitator.
3. Review the Norms for Ideation (see Norms for Ideation page).
4. Start with your clearly defined opportunity from the Discover Space. Review the HMW and guiding change. Remind the group that we are identifying solutions that will help us meet the desired results laid out in the guiding change.
5. Each person gets a stack of post-it notes to individually write down any ideas that come to mind as it relates to your defined opportunity. Spend 5-7 minutes quietly having the group generate as many ideas as possible, putting one idea per post-it note.
6. After the 5-7 minutes is up, find an open space on the wall. The facilitator should have one person start by sharing one of their ideas and placing the post-it note on the wall. Others who have similar ideas should put their note near the original idea. Even if someone has the exact same idea, they should share it aloud and group it appropriately.
7. As groups or categories of ideas are created, the facilitator should use a different color post-it note to identify the theme in that group of post-its. Capturing these themes will help us take the next step towards prototyping.

See it in action

Video example: [Link here](#)

Design Space:
Moments (or Chapters)*

What it is

A method of initial prototyping that asks the designer to sketch out a story of the key moments in the ideal journey of the end user we're designing for.

Why we do it

Sometimes, as we begin to prototype based on ideas we've generated, it can be difficult to articulate what a user experience will look and feel like. Moments (or chapters) challenges designers to define an experience at key moments along the journey. Fixing the number of moments forces people to make tough calls about what's most important.

How we do it

1. Agree on the moments, or chapters, you'd like the design group to focus on. Moments can be non-sequential experiences such as "in the classroom" and "outside the classroom." Defining chapters is a similar method, but for a chronological experience such as "before school," "during school," and "after school."
2. Give participants a fixed number of large Post-its. Providing 3-6 Post-its notes is ideal depending on the scope of the design. Participants should use these Post-its to sketch out what they believe to be the key solutions for people given their mindset in the moment, and inspired by the ideas that were generated.
3. Set a timer for 8-10 minutes. Direct each participant to describe, in words and pictures, the user experience within each "moment" or "chapter." When stitched together, the Post-its should present a solution, and in itself, a very rough and initial prototype.
4. When the timer ends, have each participant present their Post-its to the group. Have them describe each step. If a step of the story is vague, push them to be clear. As participants present, look for or record key themes that are common in each.
5. Solicit feedback from the group after each participant presents. What works? What might need further development?
6. Conversations and themes should help take the steps toward refining a more complete prototype.

See it in action
Video example: Link here

*Adapted from © 2016 GoKart Labs. http://www.gokartlabs.com
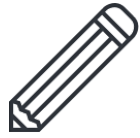
Design Space: Rapid Prototyping

What it is

A method for jumping from ideas to actually building something that, initially, gives just enough detail to get feedback on.

Why we do it

Rapid prototyping pushes us to embrace infectious action and not get caught up in perfection paralysis. Quickly creating a mock-up of an idea not only gets the process moving, but also creates a model just good enough to get feedback on – a critical component for quickly cycling through multiple iterations.

How we do it

1. You can either start here after ideation, or use an intermediate method like Moments/Chapters to get the group prepared for prototyping. Begin by identifying one of the big ideas that came from your ideation session, or a key theme from a method like Moments/Chapters.
2. Create a structure, visual diagram, story, storyboard, mock up, or model of what the desired experience would be. Remember, prototypes are not precious. They should be rough and open to critique.
3. Continue refining each idea until it becomes something viable and solid.
4. Periodically check your prototype against your HMW question(s) and your Guiding Change. Ask yourself, "does this solution have a shot at answering our HMW question?" "Does it get us closer to our desired results?" "Would this prototype violate any of our unacceptable means?" If so, refine or eliminate accordingly.
5. As soon as possible, get your rough prototype in front of others for feedback. In particular, feedback from key stakeholders is incredibly valuable. Use each round of feedback to create a new iteration of your initial prototype.

See it in action

Prototype examples: Link here
Video example: Link here

Design Space: The Pitch*

What it is

Use this method when you need to elicit feedback from an individual, small group, or large group on one or more prototypes.

Why we do it

This tool will help you gain feedback to make a decision on what prototype to move toward implementation. It's also a great way to quickly share about a prototype if you're looking for feedback on your next iteration.

How we do it

1. Prepare a short overview of the prototype. This will be shared with the individual, small group, or large group of people that you are hoping to get feedback from. Use the steps below to frame this overview.
2. Identify the team that will present the prototype either face to face or via video.
3. Share the story of the prototype. Make sure that you share the why and how, then the what:
    ○ Share the challenge, opportunity, or problem
    ○ Share why the existing solutions fall short
    ○ Share the solution
4. Gather feedback to refine toward the next iteration of your prototype or to inform implementation of the prototype.

*Adapted from Kelley, D., & Kelley, T. (2013). Spark. In *Creative confidence: Unleashing the creative potential in us all*. New York: Crown Business.

Design Space:
I Like, I Wish, I Wonder*

What it is

A way to gather feedback on a prototype focused on three key areas:
- What will likely work
- What could be better
- What risks or solutions might exist

Why we do it

Honest, solution focused feedback helps all of us get to the best solution. This method gathers actionable feedback from small or large groups, and breaks down barriers of communication while challenging assumptions.

This method can be used before or after implementing a prototype.

How we do it

1. Gather a group together. This likely will be stakeholders, or the "A Group," of your prototype.
2. Have someone assigned to capture the feedback.
3. Have someone assigned to give "The Pitch" to the feedback group.
4. Ask the feedback group to express what they liked, what they wish could be part of the prototype, or something they wonder (a possible situation or a solution that the team could consider).

*Adapted from Kelley, D., & Kelley, T. (2013). Spark. In *Creative confidence: Unleashing the creative potential in us all*. New York: Crown Business.

DELIVER
SPACE METHODS

The Deliver Space is where true innovation happens. Nothing changes until we do… until our ideas are actually put into action.

Our Essential Playbook keeps it simple and straightforward. We being with a framework for putting the plans into place to make sure your design is implemented. Next, we don't provide a method, but rather a reminder, that every design will have room for refinement. Keep tabs on the implementation. What's working? What's not? It's never too late to learn from failure or move to the next best iteration. The design process is cyclical and ongoing, and a natural element of innovation to be embraced.
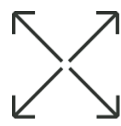
Implement
Planning for Implementation

Refine
While we don't have a method in the Essential Playbook specific to refinement, a critical component of any implemented design is monitoring the implementation, checking in on what's working, what's not, and continuously getting to the next best iteration.

Deliver Space:
Planning for Implementation*

What it is

A method for ensuring that prototypes get implemented.

Why we do it

Nothing is innovative until we actually try it. Having a solid implementation plan that leverages each member of the design team ensures a timely implementation that leads us to better and better opportunities.

How we do it

1. Once your prototype has been developed, and iterated upon, gather your design team, as well as any stakeholders or choice-makers, if possible.
2. Begin by generating a list of all task that need to take place to make your design happen.
3. Next, generate a list of all resources needed.
4. Take a look at both lists, and assign tasks and those responsible for collecting necessary resources.
5. Open a calendar, and set a date for implementation.
6. On the same calendar, commit to timelines and dates for completing tasks, collecting resources, and checking in on progress as a team.

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