

SLP 3D Design

Thinking Methodology

The Everything Playbook



USING THE EVERYTHING PLAYBOOK

Get ready...you're about to design! The Everything Playbook is specifically designed for experienced users who are preparing to tackle a design challenge that may take an extended amount of time, or has a relatively large scope. Many of the methods you'll find in this playbook should look familiar, and every single one isn't necessarily required. As you frame up your challenge, pick and choose methods that will provide for thorough insight on the user experience and context, and utilize design methods likely to get your team to viable solutions ready for implementation. 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 methods 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](#)

[Keeping a Bug List](#)

[Rounding](#)

[Walkthroughs and Learning Walks](#)

[Decision Making Model](#)

Insight

[I Need, So That](#)

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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: Keeping a Bug List

What it is

A bug list is a method for recording even the smallest pieces of our day that could be easily improved.

Why we do it

Heightening our awareness to even the most mundane aspects of our day can lead to incredible inspiration for improvement and innovation.

How we do it

1. Determine a record keeping method of your choice. This might mean opening a Google Document, an Evernote note, or a piece of paper you keep handy in your bag.
2. Be mindful throughout the day of things that “bug” you. From the significant to the miniscule, write down the less than ideal experiences or environments you encounter.
3. Periodically revisit your bug list. Identify experiences or environments listed that you could meaningfully improve.





Discover Space: Rounding

What it is

Use rounding on a regular basis to get a pulse on how users feel about their experience. Be open to listening deeply and allow their responses to trigger an initial inspiration for design.

Why we do it

Opportunities for design are all around us, and rounding with students, families, or staff can often spark inspiration around something you might not have otherwise taken note of.

How we do it

1. Schedule a time to meet one on one, face to face, with your stakeholder. Plan on spending 5-15 minutes at most in this conversation. Rounding is pretty quick. If you want to talk more in depth, consider the method “Interview with the User.”
2. Discuss thoughts, concerns, and areas or people to praise. It’s most productive to go in with a set of identified open-ended questions to focus the conversation, but be open to a natural, free flowing dialogue.
3. Identify major themes to come out of your conversations that could potentially serve as inspirations for design.





Discover Space: Walkthroughs and Learning Walks

What it is

An opportunity to observe your user as they engage in a particular experience or in a specific environment.

Why we do it

Walkthroughs and Learning Walks give you a chance to observe a system or stakeholder. They provide an important snapshot that might help uncover needs or information that would have otherwise gone unnoticed.

How we do it

1. Plan ahead to visit for 5-20 minutes while the system or structure is playing out.
2. If you're engaging in a walkthrough, identify ahead of time elements you intend to look for or seek from your visit. If you're engaging in a learning walk, remain open to allowing whatever might happen to reveal itself naturally – informing you as you go.
3. Immerse yourself as much as possible to best understand how the user would experience the system or structure. Take notes or capture moments with pictures, if appropriate.
4. Use the notes you took to identify major themes that might serve as inspirations for design.





Discover Space: Decision Making Model*

What it is

The Decision Making Model helps us define and map the roles, responsibilities, relationships, and timing in a decision making process.

Why we do it

We use the Decision Making Model to understand the impact of all stakeholders, while clarifying the roles of all involved. One of the key strengths of this framework is that it reinforces decision making as a process, and choice making as an important step in that process.

How we do it

1. As the facilitator of a design, it's important to know who will be involved in creating options, with whom you will need to create a shared reality, and who the decision makers will be before the design process starts.
2. The facilitator should walk through each part of the Decision Making Model with the design group so that all know their roles and responsibilities in the work.
3. Start by sharing that the design group is often referred to as the "B Group," which is the group that is charged with creating options. Most likely, the group you are working with is the "B Group." This group tends to have specific expertise, experience, or knowledge concerning the opportunity at hand.
4. Share that we will get feedback on options from the "A Group." The "A Group" is made up of stakeholders whose feedback is needed, and with whom creating a shared reality would be valuable.
5. Once you've gathered feedback from the "A Group," the "B Group" will likely iterate off of their original prototype, then pitch the idea to the group that represents Choice Making, often referred to as the "C Group." The "C Group" will make the decision on how to move forward with the prototype. The "C Group" should refer to the guiding change document at this time.
6. After the decision has been made, implementation will occur. It's unlikely that the prototype will be perfect after the first try, so there will be continuous refinement.

See it in action

Link to Decision Making Model visual: [Link here](#)

*Adapted from ã 2010 TeamWorks International, Inc.





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](#)

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Discover Space: Empathy Map

What it is

Empathy maps are best used in situations when your challenge involves an experience or product that is currently not meeting the needs of your user.

Why we do it

Empathy maps help build a better understanding of your user's experiences by digging deeply into how they're feeling and what they're seeing, doing, and hearing. Ultimately, this will help identify pain points during their experience, as well as opportunities for improvement.

How we do it

1. Select your primary stakeholder. Your primary stakeholder is the person or group you most want to positively impact with your design.
2. Complete your empathy map by recreating the graphic linked below on chart paper. Complete the top portion either by interviewing your stakeholder, or by putting yourself in their shoes through your observations and insights on their experience.
3. In the 'Pains' section, list pain points during the user experience. What elements of their experience are less than desirable? In the 'Gains' section, highlight areas of opportunity for bettering their experience.
4. When defining your How Might We question from your Discover Space insights, consider how "Pain" points can be lessened and "Gain" points can be leveraged.

See it in action

Empathy Map framework graphic: [Link here](#)





Discover Space: Journey Map*

What it is

Use a journey map to help identify the areas that are most in need of redesign when you're trying to improve the experience of your user.

Why we do it

Journey maps help make the journey of your user tangible by mapping out the major events of their experience. You will take a walk in their shoes through images and words.

How we do it

1. Determine whose journey you're mapping. A student? A parent? A colleague? etc.
2. Determine a timeline. Will you be mapping a single experience, an hour, an entire day, or maybe a longer timeframe? This will depend on what challenge you're tackling.
3. On a document or piece of paper, map out the major events or activities of the user's journey over time. For example, if you're redesigning a lesson or unit, map out the timing of various learning experiences. Due to the fact that each journey is unique in number of events and timeframe, no template is provided.
4. Identify points in the journey that are less desirable AND that you can influence or impact. When defining your How Might We question from your Discover Space insights, use these points as inspiration.

See it in action

Video example: [Link here](#)

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Discover Space: In, Out, and Around*

What it is

A method for examining other organizations outside of our space that have solved for a human need similar to ours.

Why we do it

Every day, everywhere, humans are seeking new and interesting ways to solve the many challenges they encounter, or embrace the countless opportunities they uncover. By looking in, out, and around our own school district, we leverage insight not only from our own experiences, but from the experiences and ideas of people all over the world.

How we do it

1. Think about the challenge or opportunity the team is trying to tackle.
2. As the facilitator, write down all the human needs the challenge or opportunity is trying to meet. (For example, if the opportunity was to improve your daily morning routine, some human needs that might be met are the need to create/preserve more time, the need to feel in control of your day, etc.)
3. Start looking for examples in and out of the space you're working to look for organizations that have solved for a similar human need. For example, many groups and organizations have tackled for the human need of creating and preserving time. Even though these examples might have nothing to do with our day to day experience, looking at the creative ways others have solved for a similar need can provide a tremendous amount of insight for how we might creatively solve for our own challenge.
4. As the facilitator, create themes from the examples you've found.
5. Build slides (one per example) with imagery, video, and wording that represent the experiences you explored.
6. Present your slides to the design team. Ask those watching to identify elements they observe that resonated with them or align with their thinking, as well as those that don't.
7. Follow up by doing a "This, Not That" to capture feedback from the group. "This, Not That" is the next method described in this playbook.

See it in action

Example 1 (human need: to be engaged/invested): [Link here](#)

Example 2 (human need: flexibility – education focus): [Link here](#)

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





Discover Space: This, Not That*

What it is

A method for quickly highlighting the preferences of a group.

Why we do it

After presenting a provocation, example, or any piece of insight to a design group, it pays off to get a scan of where everyone's heads are at. This, Not That provides a quick and visual way to get a handle on the likes and dislikes of the group.

How we do it

1. Provide the design team with two different colored sticky notes. Designate one color as “This,” and another color as “Not That.”
2. Present the group with a provocation, example, or piece of insight for them to consider that relates to your design. We often couple this method with our In, Out, and Around method.
3. Have participants individually fill out sticky notes to indicate their preferences for “This” – elements or components that resonate with them.
4. Participants should also fill out sticky notes to indicate those elements that don't resonate with the – the “Not Thats.”
5. Have the design team members share their notes on a blank piece of wall space. Theme those that are similar. This gives a quick and visual scan of the preferences and current mindsets of the group.

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





Discover Space: Extremes and Mainstreams*

What it is

A method for examining the needs of the “middle of the road” user we tend to naturally consider, as well the extremes on either end.

Why we do it

When interviewing users or immersing yourself in their world, learn from both mainstream users as well as those on both extremes. If your design works for the extremes, it’s possible it will suit your middle of the road customers as well. ‘Extremes’ also have the potential to open your eyes to new ideas you never would have thought of.

How we do it

1. Identify your primary stakeholder or user. Within that group (e.g. “students” or “parents”), identify characteristics of the “middle of the road” customer. Then, using that description as a frame of reference, identify characteristics of the extreme user on either end.
2. As you identify various methods of insight gathering (e.g. interviews, rounding, observations, etc.), purposefully select a few people you know are extremes – as well as those that fall in the middle. Consider all the different people you might be impacting with your design.
3. Be sensitive to your extremes as you interview them or immerse yourself in their world. They may not be used to being tapped for their insight or perspective. Make them feel welcome and let them know how much you value their voice.

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Discover Space: Interviews with the User*

What it is

A method for gaining insight directly from the source – your primary customer or stakeholder.

Why we do it

Interviews with the user give you a first-hand account of their experience, which better equips you to design something desirable for them. Remember that interviews are often more about understanding latent needs as many users won't be able to articulate what's missing or might need changing. The right questions will help you uncover these latent needs.

How we do it

1. Formulate your questions. Structure questions to eventually get to the root of your user's experience. Use the interview guide linked below to support you as you write your questions.
2. Identify a structure for capturing responses. Be creative. Beyond verbal responses, ask your user to show you, draw a response, or think aloud freely to elicit deeper responses. If meeting face to face with your user isn't an option, try using a google survey or video to capture their experiences.
3. Make sense of the responses. Look for major themes, learning, and opportunities that came out of the interviews. Remember to check your natural bias.
4. When defining your How Might We question, use your insights and themes from your interview as inspiration for how you might design better solutions or experiences for your user.

See it in action

Build a Question Guide – Interview: [Link here](#)

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Discover Space: Shadowing the User

What it is

When your challenge involves improving the experiences of a particular person or group, and your design timeframe allows for it, observe your user in the setting that the challenge typically occurs. Immersing yourself in the experience allows you to experience the opportunity just as your user would.

Why we do it

Observation or immersion in an experience helps build empathy with your user. You can put yourself in their shoes to highlight insights you might not have otherwise noticed. If you observe others with the skills of an anthropologist, you might discover new opportunities hidden in plain sight.

How we do it

1. Choose a place or event where you can have an experience that is relevant to your challenge, perhaps following an individual through an experience. (ex: “shadowing” a student)
2. Prior to observing or immersing, identify aspects of your experience you want to capture.
3. Identify major themes, links, insights, or surprises that came out of your observation or immersion experience.
4. When defining your How Might We question, use your insights and themes from your observation or immersion as inspiration for how you might design better solutions or experiences for your user.





Discover Space: Analyzing Trends in Data

What it is

An opportunity to observe the quantifiable in a particular system or situation, in order to inform decision making and design.

Why we do it

Looking at the data will help you objectively view what is happening within our system. Analyzing trends in data will help you discover useful information, suggest conclusions, and support decision-making. You will understand the frequency and distribution in terms of people, places, and time.

How we do it

1. Collect the pertinent data and have it in a format in which the group can easily view and analyze.
2. Set a timer for a predetermined amount of time, dependent on the amount of data you are looking at. Usually, 5-10 minutes is enough to look at a segment of data.
3. Instruct the group to examine just the facts in the data first. We're not looking to make any inferences or assumptions yet.
4. Have each individual share the facts that they noticed when analyzing the data. You may want to capture themes on chart paper.
5. Set a timer again for 5-10 minutes for individuals to determine the "so what." In this part of the method, individuals will look at what this data might be telling us by drawing inferences.
6. Have each individual share their "so what" notes. Again, you may want to capture the themes on chart paper.
7. Set a final timer for 5-10 minutes for individuals to determine the "now what." In this part of the method, individuals will determine what should be done as a result of this data.
8. Have each individual share their "now what." Again, you may want to capture the themes on chart paper. All of this insight will better help you identify the root cause of the challenge.





Discover Space: Premortem (Anticipating Pitfalls)*

What it is

A method for identifying needs or preemptively anticipating issues before we even begin designing.

Why we do it

As the name suggests, a premortem evaluates the project before we've even designed it, while it can still be improved. When we jump into a design, we already have a desired outcome in mind, which naturally inhibits our ability to see the less desired outcomes that are still possible. Identifying the less desirable outcomes ahead of time gives us a chance to create designs that mitigate their likelihood.

How we do it

1. Determine a timeframe after the project has ended, and the design has been implemented. For example, 3 months after implementation, 1 year, 5 years, etc.
2. As the facilitator, ask the design team to imagine the project or design has failed as of the timeline indicated above.
3. Set a timer for 5-10 minutes, and using sticky notes or chart paper, have each member of the team generate all the reasons why the project has failed.
4. Provide an opportunity for team members to share some (top 3?) or all of their reasons with the group.
5. Use this “prospective hindsight” to preemptively inform the design process, increasing the chances of a successful implementation sooner.

*Adapted from Meyer, Eric A., and Sara Wachter-Boettcher. Design for Real Life. New York: Book Apart, 2016. Print.





Discover Space: Finding Themes*

What it is

A method for synthesizing insight gathered within the Discover Space.

Why we do it

After collecting a number of insights, finding themes can help your team make sense of everything they've seen, heard, experienced, and learned. This is a natural step to take prior to entering the Define Space.

How we do it

1. Review major insights gathered in the Discover Space. This might take the form of a gallery walk of the methods completed, the facilitator highlighting key takeaways in a presentation, or another method that helps the group revisit everything they've learned up to that point.
2. Ask team members to individually generate key themes from everything they've seen. This might take the form of a short quick-write or list or adding themes to sticky notes.
3. Have individuals share their insights, and begin to clump similarities into major themes or categories. Arrange and rearrange as you discuss. Debate and talk through concepts that emerge. Continue until the group comes to a consensus about the clusters.
4. When moving into the Define Space, these clusters can help inform the direction of How Might We questions, or signal important components of the current reality and/or desired results.

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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 a couple 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 HMW Question](#)

[Developing a Guiding Change](#)

[Playing Field](#)





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](#)





Define Space: Playing Field*

What it is

A method for aligning the goals of the team, and to identify constraints.

Why we do it

Playing Field is a fun add-on or alternative to a traditional Guiding Change, using a metaphor that people already understand.

How we do it

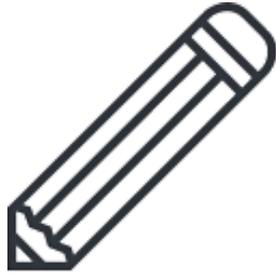
1. Prior to facilitating this method, we highly suggest taking a look at the Guiding Change method in this playbook to understand the components of that tool, as well as the descriptors that help you facilitate the method. They will come in handy when using Playing Field with a group.
2. As the facilitator, begin by briefly explaining each component of Playing Field so that participants get an overview of the purpose, as well as alignment to the baseball metaphor.
3. Grab a piece of chart paper or a whiteboard. Begin by writing “Current Record” along the top. Current Record parallels the “Current Reality” portion of a Guiding Change. Have the group identify the Current Record as it relates to this particular opportunity.
4. Next, draw a simple baseball diamond with a first base, second base, third base, and home plate. Have the group identify what it would look like to hit each of these points, with home plate being a home run. Record goals on the diamond as the group generates them. It may be useful to start with the extremes. For example, what would a home run look like for this design? A single? What falls in between? This portion parallels the “Desired Results” of a guiding change.
5. Lastly, draw a T-Chart labeled “Fair” and “Foul.” Have the group share the ways they can or can’t achieve their goals (placing ideas in Fair and Foul accordingly). For example, a common “Foul Ball” would be designing something that violates employee contracts. This element parallels the “Unacceptable Means” of a guiding change.

See it in action

Video example (of steps #4 and #5): [Link here](#)

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





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](#)

[Why This Won't Work](#)

[Dot Voting](#)

Prototype

[Moments \(or Chapters\)](#)

[Storyboard](#)

[The Pitch](#)

[I Like, I Wish, I Wonder](#)

[Feedback from an Outsider](#)

[Decision Matrix](#)





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.

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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](#)

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Design Space: Why This Won't Work

What it is

A method for getting all the nagging “we can’t do this” or “this won’t work because” thoughts out in the open.

Why we do it

Sometimes when we embark on creative endeavors full of possibility, it helps to acknowledge the mental blocks we have about the work. Doing so physically gets those blocks in front of us so we can literally put them aside and embrace our urgent optimism and creative confidence.

How we do it

1. Gather your team and grab sticky notes or a large piece of chart paper.
2. Set a timer. Don’t give yourself any more than 10 minutes.
3. When thinking about your design challenge, write out all the reasons you don’t think your ideas will work, or all the reasons you’re hanging on to about why we can’t solve this problem.
4. After writing these out, set them aside or throw them away altogether. Remove these mental blocks and trust that with the right team and the right inspiration, you’ll generate the ideas it will take to create meaningful change.





Design Space: Dot Voting

What it is

A quick and easy method for identifying the top preferences of the team, helping to move a design forward.

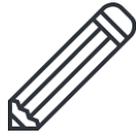
Why we do it

At various points in the design process, there may be times when the group has too many options to choose from, making decision making or consensus building difficult to achieve. Dot voting helps make preferences visible and quickly and democratically bypasses any potential stalemates.

How we do it

1. Apply dot voting at any point in a design when there are too many options in front of the group, making it difficult for the team to move forward.
2. As the facilitator, identify the number of votes a person should get for this particular point in a design. We generally give people 2-3, but that number might vary based on the size and scope of a design, or the point at which you're asking participants to vote.
3. Give participants the defined number of stickers or a marker.
4. Ask participants to examine the array of options in front of them (could be HMW questions, ideas from an ideation session, several early prototypes, themes generated, etc.). Ask them to place their stickers or put dots with their markers next to the options they are most invested in or feel have the most potential.
5. Participants may spread their votes among options or place multiple votes on options they're most compelled to move forward with.
6. As the facilitator, identify a manageable number of options that have received the most votes. Alternatively, you might combine or refine options to incorporate additional preferences of the group highlighted in voting.





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

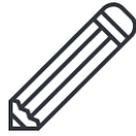
1. Agree on the moments, or chapters, you'd like the design group to focus on. Moments can be non-sequential experiences such as "in the classroom" and "outside the classroom." Defining chapters is a similar method, but for a chronological experience such as "before school," "during school," and "after 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: Storyboard*

What it is

A method for further detailing out a prototype.

Why we do it

Storyboards help detail out how a user would move through the desired experience you've created in a visual manner. Because of the visual manner, it may be a helpful way to share the prototype with others for feedback.

How we do it

1. Use one sticky note for each frame of your storyboard, or draw out a series of boxes on a piece of chart paper.
2. Draw one image for each step of the experience. The image should describe the experience with minimal or no words.
3. Gather feedback, then refine your prototype based on what you've learned.

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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 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.





Design Space: Feedback from an Outsider*

What it is

A method for refining your prototype based off feedback from someone with plenty of distance from the design.

Why we do it

Our natural tendency will be to gather feedback from stakeholders most closely tied to our particular design. This natural tendency is one to follow, and should serve as a primary source for iterating on a prototype. However, particularly at points when a design has stalled or needs a little inspiration, getting a fresh set of eyes and new perspective can jump start a next round of iteration.

How we do it

1. Arrive at a stopping point - either because you are stuck or because you feel good and are ready to share. Remember, we should be putting our prototypes in front of others early and often in order to cycle through iterations quickly!
2. If you've already gathered feedback from obvious stakeholders or primary users, identify a person or group who has little experience with the opportunity or challenge you're designing around.
3. "Pitch" your prototype to the outsider. Solicit feedback in the form of "I like, I wish, I wonder."
4. Take this fresh perspective, and use it as an opportunity to jump start further iterations on your prototype.

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Design Space: Decision Matrix*

What it is

A method to inform next steps and choice making amongst various prototype options.

Why we do it

This tool will help you through the decision making process to decide which prototypes best align with your desired results.

How we do it

1. Place all prototypes along an X axis.
2. Place desired results that you want to meet along the Y axis. These should come directly from the Guiding Change you completed in the Define Space.
3. Place check marks where each prototype meets the criteria.
4. Determine which prototype meets most or all of the criteria.
5. Decide which prototype to move forward with based on your matrix.

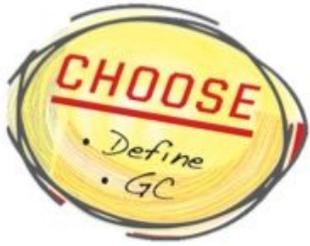
See it in action

Decision matrix example: [Link here](#)

Decision matrix blank template: [Link here](#)

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CHOOSE SPACE METHODS

The Choose Space requires us to embrace infectious action, and make sure we do something. It's easy to spin forever making sure our prototypes are perfect, but we're never truly going to learn what will get us to our next best iteration until we make the choice to implement.

Choose methods help the team determine when it's time to implement the current iteration of a prototype, or to select between multiple prototypes that might still be on the table. This seemingly simple but important step ensures the design keeps moving.

Define

[Revisiting the Guiding Change](#)

[Developing a Teachable Point of View \(TPOV\)](#)





Choose Space: Revisiting the Guiding Change

What it is

A method for determining which prototype to implement, or identifying the point at which a prototype is ready to be implemented.

Why we do it

Prototypes can be iterated on endlessly. It's also quite likely multiple prototypes have the potential to be desirable or guide us toward a better tomorrow. This can often stymie our ability to effectively choose the right time or the right prototype to implement first.

How we do it

1. Refer back to the Decision Making Model for the design at hand, and highlight the C Group Choice makers for this particular opportunity. Choice makers might be an individual or team separate from the Design Team, or it may be a person or people within the design team itself.
2. Get the current iteration of a prototype or prototypes in front of the Choice maker(s). Alongside the prototype(s), provide the project Guiding Change.
3. Choice makers should evaluate prototypes to determine if they have a strong likelihood of getting the project closer to its Desired Results. Prototypes should also be evaluated to ensure they do not violate any Unacceptable Means.
4. Based on the information gathered through this evaluation, Choice makers should either
 - a. Recommend a prototype for implementation
 - b. Recommend multiple prototypes for implementation
 - c. Recommend further iteration to get the prototype closer to achieving Desired Results, or to eliminate any violation of unacceptable means





Choose Space: Developing a Teachable Point of View (TPOV)

What it is

A method for developing a concise and high impact message about the prototype you intend to implement.

Why we do it

While you might choose to develop a Teachable Point of View (TPOV) at any time during a project or design, they come in particularly handy once it's time to implement. Having a well thought out and easily shared TPOV will help support the communication aspect of moving a prototype into the Deliver Space.

How we do it

1. Reflect on the process that you went through, including experiences that came out of the Discover, Define, and Design spaces. Ask yourself - What values and experiences lead you to the prototype you chose? What is the purpose of the prototype?
2. Generate bullet points or key takeaways that come out of reflecting and conversing.
3. String your bullet points into a coherent message. Keep the message concise but high impact.
4. Practice your TPOV! Those who were not a part of the design will have questions or will likely be curious about how your prototype came to be. Having your TPOV committed to memory will ensure a clear and consistent message from each design team member.



DELIVER SPACE METHODS

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

We begin with a framework for putting the plans into place to make sure your design is implemented, and that you're able to monitor that implementation. Next, we provide a series of methods that will support the refinement of your prototype, as well as support your team's ability to reflect. You will learn a lot as you implement, and that information will absolutely inform refinement

Implement

[Planning for Implementation](#)

[Monitor Implementation](#)

Refine

[Program Evaluation](#)

[Spread the Word](#)

[Postmortem \(After the Fact\)](#)



Deliver Space: Planning for Implementation*

What it is

A method for ensuring that prototypes get implemented.

Why we do it

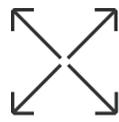
Nothing is innovative until we actually try it. Having a solid implementation plan that leverages each member of the design team ensures a timely implementation that leads us to better and better opportunities.

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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Deliver Space: Monitor Implementation

What it is

A method that will keep us on track to make sure that we are following our implementation plan.

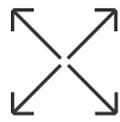
Why we do it

It's easy to let the chaos of the day affect us once we leave a design session. We could spend an hour, a day, or a week designing a prototype, but then forget about it once we get back to the whirlwind of day to day tasks. This method helps us make sure that we stay true to our prototype. Remember, nothing is innovative until we try it!

How we do it

1. You likely already completed your implementation plan. If you haven't, that's a great place to start!
2. It's a good idea to have an accountability partner with the implementation of your prototype. Have scheduled times to check in with this partner so that he or she can keep you accountable and have reflective conversations with you. This might be a person in your building or outside of your building. Pick someone that you know will help to keep you on track.
3. As part of the implementation plan, you committed to a timeline. Make sure you stick with the timeline. If you aren't able to, reflect on this. Was it because you were too ambitious? Was it because it wasn't feasible to complete in your initial timeline? Was it because other tasks took over?
4. After implementation, set time to reflect on the process and results of the prototype. Look at qualitative and quantitative data. Did you achieve your desired results? Why or why not? If you didn't meet your desired results, was it because of the process of implementation or the prototype itself?
5. If you're not sure how to evaluate, see the Program Evaluation method, and consult with Jenna Johnshoy, our Learning Analytics Coordinator. She can give you tips on how to effectively evaluate your prototype!





Deliver Space: Program Evaluation

What it is

A program evaluation collects, analyzes, and uses information about prototypes and projects to help future decision making. The program evaluation will help us understand how stakeholders feel about the prototype and what refinements we may need to make.

Why we do it

We use this method to help us understand how the users have experienced the prototype, or what within the prototype worked well or not. This is a critical step to take prior to making refinements.

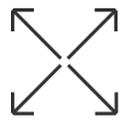
How we do it

1. Determine the objectives or desired results that you hoped to achieve through with your design.
2. Determine how you will measure success in meeting the objectives or goals. This might be using quantitative and qualitative data, including assessment data, interviews, focus groups, surveys, etc.
3. Set the target for each aspect you want to measure. This will help you determine if you met your goal after collecting the data.
4. Collect the data.
5. Analyze the data to see if you met your goals.
6. Use this information to refine your prototype.

Is this a large scale prototype or evaluation?

Contact Jenna Johnshoy, our Learning Analytics Coordinator, to consult or partner.





Deliver Space: Spread the World

What it is

A method for cascading the positive impact of your implementation.

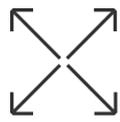
Why we do it

Educators are sometimes notoriously known for being modest. While there's no premium on bragging, sharing the successes of an implementation or lessons learned throughout will help make a positive impact beyond a single implementation, and is one of the first critical steps toward scaling.

How we do it

1. After implementation, gather your implemented prototype, evidence collected or monitored after implementation, as well as refinements added and lessons learned throughout the process.
2. Use the resources in step 1 to share your story. This might happen in a PLC, during professional learning, at a planning meeting, or in a more casual setting.
3. Be specific. Remember that highlighting lessons learned includes what worked well, what didn't, and how the design evolved or was refined throughout. Our "fails" are valuable learning experiences, and our "wins" are obligatory strategies to share.
4. Encourage those listening to take an action step based on what your design team already learned. Is this something they could implement? Is there an iteration they might make on what was originally designed? Depending on the scope of the design, this step might be anything from an individual commitment to creating a detailed plan for a widespread scale.





Deliver Space: Postmortem (After the Fact)*

What it is

A method for examining results of your implementation after the fact.

Why we do it

The design process is cyclical, and in many ways, never-ending. There is always room for improvement. Implementation provides us a tremendous amount of information. Our ability to capture that information, make sense of it, and develop action steps and refinements based on it is a critical component of human-centered design.

How we do it

1. Hold the postmortem as close to the completion of the project or implementation as possible. You may do multiple rounds of postmortem reviews as you learn and refine multiple times. Each time, examining results will be much more reliable if key details are not being drawn from long-term memory.
2. Either at the meeting or prior, have individuals on the design or postmortem team reflect on results of the implementation. Provide a few quick questions to guide reflections. Short questions such as “what worked well?” or “what didn’t go as expected?” are great. Simple yes/no questions can also be insightful such as “were timelines realistic?” or “did you have the resources you needed to feel successful?”
3. At the meeting, as a group, review the guiding change desired results. Discuss those that were met, and those that were not. Reserve judgements about the why at this point, simply providing evidence to suggest that goals were met or are still being worked toward.
4. Next, move into providing evidence about the why. Foster a conversation about what led to wins, as well as what led to goals not being met.
5. Lastly, use the information gathered to develop next steps for refinements that capitalize on what’s already working, and address elements that are not. Next steps should be concrete and time bound. We suggest following a very similar structure to our “Planning for Implementation” method found in this playbook.

*Adapted from Monte, Jason. “A Project Post Mortem Template.” *The Brolik Blog*. Brolik, Inc., 13 Oct. 2016. Web. 07 June 2017.



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