SEE & EXPERIENCE

OBSERVATION

Given our familiarity with workplaces and the routines of everyday life, we don't see and reflect on what's really going on. Focused observation is a powerful tool.

HOW TO

1. Think about and decide what environment or context you'd like to spend time observing.
2. Take a notebook, pen, and a simple note taking framework of AEIOU (Activities, Environment, Interactions, Objects, and Users).
3. Find a place to sit and observe without being in the way. Don't hide, but don't impede. Let the people know you're there to learn, not to evaluate.
4. As you observe the action, note what grabs your attention and what raises questions in your mind.
5. Sketch out the environment. Make a list of things for a specific category. Count things. What's interesting?
6. Take pictures and record video. Watch the video and pin up pictures. In reviewing, you'll often see things you didn't notice the first time.

TIPS & TRICKS

Be yourself, not a sterile observer. Build rapport with the people. Take a moment to help someone or ask a question. Show interest in what they do and tell them so! Note how they are feeling and what their experiences are like.

PAIRS WELL WITH

- Empathy Map
- "Ways of…" Statements

MINDSET OF

Empathy

TIME
45–60 minutes

TEAM SIZE
1 or 2 people

MATERIALS
Video camera with good mic, camera phone, consent form

SHOW & TELL INTERVIEW

The best way to get better at learning from users and your colleagues is to have them "show and tell" you about what they do. You listen, capture, and learn.

HOW TO

1. Prepare before meeting your participant by writing down things about their situation, job or life you'd like to see and understand.
2. Be transparent with your participant about what you're trying to learn. Emphasize you'd like to know how things really are, not the conventional notion of how we think things should be.
3. Start out with a broad background question. "Tell me a little about yourself and how you got here." Use what the participant says to ask more specific questions. Use, "Tell me about..." on every topic.
4. Make sure you cover ground, don't get caught on one topic too long.
5. Collect things or pictures of things that support the user's experience: references, diagrams, tools, etc.

TIPS & TRICKS

Avoid assumptions. Have participants explain details in their own words. Have them demonstrate the activity.

"Tell me about…" and "Can you show me…?" should be the primary question forms. This avoids short yes/no or discreet choice answers.

PAIRS WELL WITH

- Observation
- Empathy Mapping

HELPS ACHIEVE

Empathy

TIME
45–60 minutes

TEAM SIZE
1 or 2 people

MATERIALS
Video camera with good mic, camera phone, consent form

DIMENSION YOUR PROJECT

What matters to a project isn't always clear at the beginning. You'll need to research across different dimensions to understand what's really going on.

HOW TO

1. Start by running a Collaborative Cycle, listing out dimensions of your project that could be interesting to research.
2. Examples include: user experiences, stakeholder opinions, duration of activities, costs, policies, available alternatives, competition and technology in use.
3. Plan how you will gather information about each of the dimensions. Schedule interviews, observations and visits to facilities. You can speak with vendors, do secondary research on the internet, and so forth.
4. Make your gathered information visual and tangible by putting it up on the wall.
5. Review and reflect on what you're learning with colleagues to identify new and more interesting dimensions.

TIPS & TRICKS

Look at dimensions that you think you already know, but gather new information from others. Look at qualitative and quantitative aspects. Cross boundaries between siloed topics or departments.

PAIRS WELL WITH

- Observation
- Show and Tell interviews
- Journey Mapping

HELPS ACHIEVE

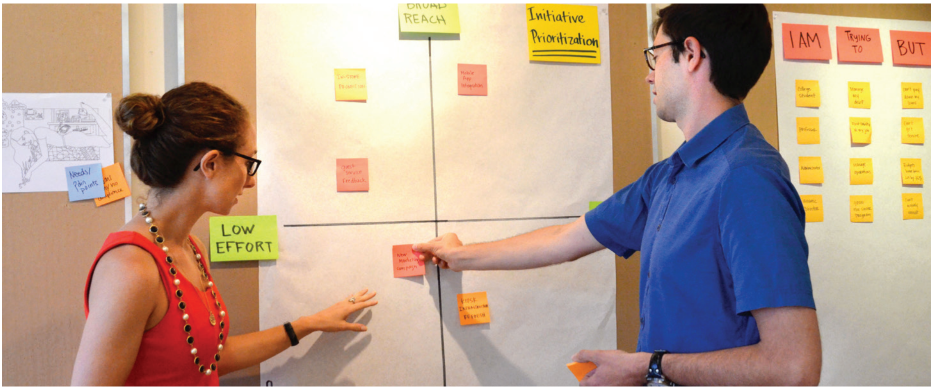
Exploration

TIME
A 90 min collaborative cycle.

TEAM SIZE
2–3 key players

MATERIALS
Sticky notes, research plan

2 × 2



Find two dimensions and plot elements on a simple chart to show patterns or gaps in the information. Use it to make a case for targeting an area with ideas or to shift strategy.

HOW TO

1 Any list of similar elements can be placed on a 2×2: a set of ideas, competitors in a market, or elements of a user experience.

2 Try different dimensions to spread the ideas out on the map—things like cost, quality, time, ease of implementation, etc.

3 Cross two of the dimensions and plot your elements. If they spread out or form an interesting pattern, you're on to something!

4 If they don't spread out, you haven't found a dimension that differentiates the list of elements.

5 Play with a few different 2×2s that work.

6 Facilitate a reflective discussion about what the pattern might mean for your project. There may be a gap in the chart suggesting an untapped area to target.

TIPS & TRICKS

Try to create a dimension unique to your list of elements, rather than typical axes. Simply trying different axes helps develop a better understanding of the list you're dealing with.

PAIRS WELL WITH

- Concept Sheets
- Brainstorms

MINDSET OF

Exploration

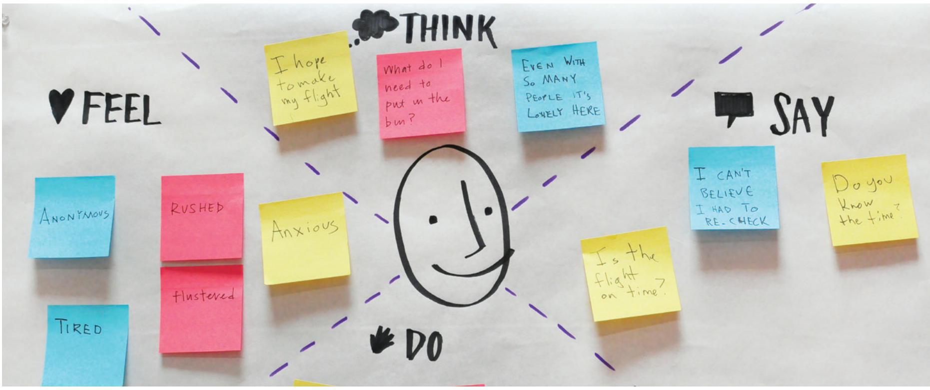
TIME
15 minutes

TEAM SIZE
1–5 people

MATERIALS
A large surface to plot out the elements and form groups

DIMENSION & DIAGRAM

EMPATHY MAPPING



Empathy for a user's experience is at the heart of creating meaningful solutions. An empathy map helps your team articulate the user's perspective.

HOW TO

1 On a large easel pad, draw the base empathy map with four quadrants: 1. Say; 2. Do; 3. Think; 4. Feel.

2 Notice that "say" and "do" are very explicit and "think" and "feel" are implicit.

3 Consider a specific user's experience and walk the map, writing down on sticky notes what the user said, did, felt, or thought.

4 Use another color for another user's experience.

5 Once populated, step back and reflect on the content. Look for patterns and inconsistencies. What's at the heart of this experience? Write down these observations and insights.

6 From your discussion, write "Ways of..." statements that can seed a brainstorm of ideas.

TIPS & TRICKS

Don't fall back on stereo-typical descriptions of users' actions or feelings. Use fieldwork and conversations with users to inform your map with real data.

PAIRS WELL WITH

- "Ways of…" Statements
- Show & Tell Interview
- Observation

MINDSET OF

Empathy

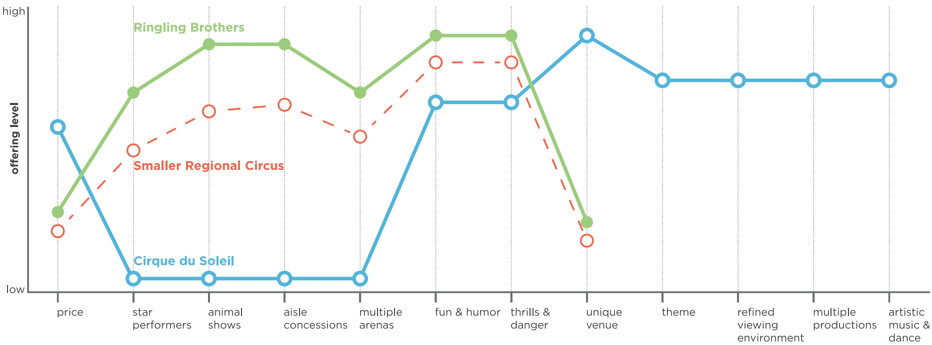
TIME
45–60 minutes

TEAM SIZE
2–5 people

MATERIALS
Easel pad, chisel tip markers, different colored sticky notes

DIMENSION & DIAGRAM

VALUE CURVE



Kim and Mauborgne, *Blue Ocean Strategy*

Innovators often change a fundamental assumption that defines an industry, product, or service. Play with Value Curves to imagine how you might change things.

HOW TO

1 Use sticky notes to brainstorm the fundamental dimensions of your industry's offering.

2 Line up the industry dimensions along the bottom of a chart. The vertical axis is "importance or level of offering" and goes from low to high.

3 Plot your organization's curve on the dimensions.

4 Plot competitors on the dimensions. Look for significant patterns.

5 Now, consider radically changing one or more of the dimensions. Try offering way more or less quality in one or more dimensions or eliminating some.

6 Consider adding dimensions that customers would value and would differentiate your solution.

7 Continue playing with the dimensions to better understand the current industry and possible strategies for improvement.

TIPS & TRICKS

Keep the number of dimensions to between 7 and 10. Use the exercise in a group to question what your industry takes for granted. Gain confidence by seeing examples from other industries.

PAIRS WELL WITH

- Analogous Examples
- Solution Maps
- Service Prototypes

MINDSET OF

Exploration

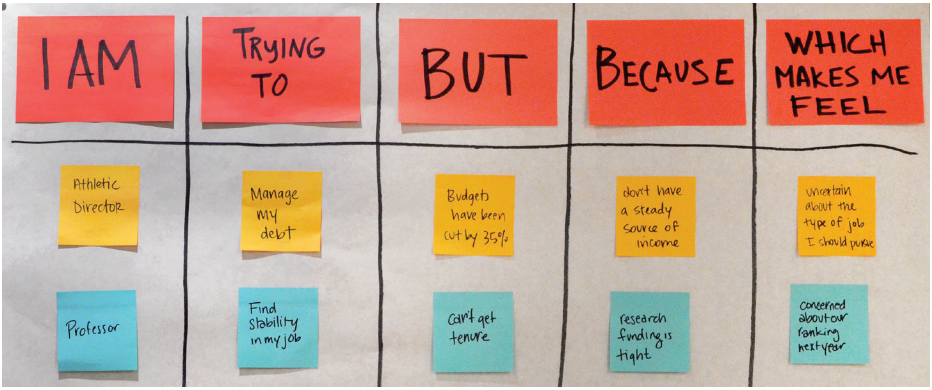
TIME
30–60 minutes

TEAM SIZE
2–5 people

MATERIALS
Easel pad, chisel tip markers or diagramming software

DIMENSION & DIAGRAM

PROBLEM STATEMENT MATRIX



Take what you've seen and heard from users to reframe your project challenge in human terms. This helps provide a fresh, user-centric perspective.

HOW TO

1 Use the problem statement template. Each team generates problem statements in the users' words, filling in each of the 5 phrases. Do this for multiple users, capturing each phrase on a sticky note, creating a matrix.

2 Have the team spend a few minutes to look at the matrix as a whole, jotting notes to self about things that struck them, surprises, patterns and themes.

3 Share the notes and discuss them as a team. Pay special attention to insights that surface that offer a fresh view into the problem. Sort and organize the notes into groups.

4 Your named groups can now be used to describe what you have, help generate more items in a group, or help you see gaps you haven't addressed.

TIPS & TRICKS

Use a different color sticky note for each user. Write in the user's words, not yours. This is great for after you do interviews with users. We've even seen physicians give this to patients to fill out (and interview them after to understand why)!

PAIRS WELL WITH

- Observation
- Any Collaborative Cycle
- 3-Part Observations

MINDSET OF

Empathy

TIME
30 minutes

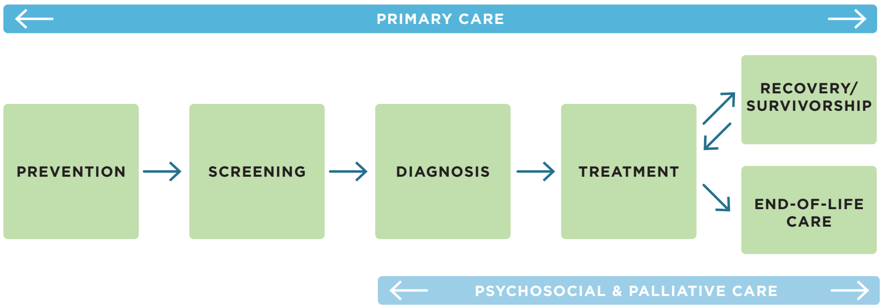
TEAM SIZE
2–5 people

MATERIALS
Problem statement template, sticky notes

DIMENSION & DIAGRAM

JOURNEY MAPPING

The Cancer Journey



To see if you understand a user's journey, create a diagram representing the distinct activities within their experience. This is a foundation for many useful analyses.

HOW TO

1. Decide what part of the user's journey you'll represent. It could be at a high level (a day in their life) or a more detailed activity (taking their meds).
2. Draw a labeled shape for each key activity in their experience.
3. Arrange them in a sequence or a cycle so you can trace their experience over time.
4. Use arrows to show direction, paths, alternatives, etc.
5. Use color or size to identify groups or different kinds of activities.
6. Once you have a base diagram, you can add more "layers" of information with labels or annotations.
7. Consider where trouble happens, where technology may play a role, what might be unnecessary, or where help would be best targeted.

TIPS & TRICKS

Use sticky notes as a way to quickly brainstorm activities and arrange them in ways that are helpful. Have a graphic designer help improve the representation.

PAIRS WELL WITH

- Show & Tell Interview
- "Ways of…" Statements
- Reviewing user video

MINDSET OF

Empathy

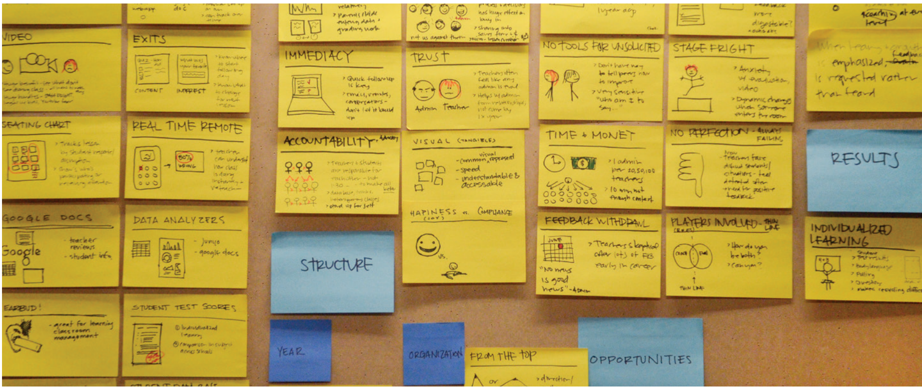
Exploration

TIME
45–60 minutes

TEAM SIZE
2–3 people

MATERIALS
Sharpies, sticky notes or diagramming software

AFFINITY CLUSTERING



Take any large list of ideas or notes and sort them into a smaller number of separate groups. Then name the groups to create an information structure and discover themes.

HOW TO

1 Use a brainstorm or other Collaborative Cycle to generate a collection of content, ideas, or issues on individual sticky notes.

2 Now, sort the items into groups. Take one item and make it the first item in the first group. Take the next item and ask, "Is this similar to the first one or something different?" Either place it in the first group or into its own group.

3 Continue item by item, placing things that are similar together and creating new groups when they don't fit.

4 After you're done grouping, you should have 5–10 groups. Name the groups based on what the items represent together.

5 Your named groups can now be used to describe what you have, help generate more items in a group, or help you see gaps you haven't addressed.

TIPS & TRICKS

Move through the grouping quickly—don't overthink it! This is a creative exercise. It's okay to group, reflect, and re-arrange. Practice makes you better and the results more useful.

PAIRS WELL WITH

- Collaborative Cycle
- Brainstorms
- List of user needs

MINDSET OF

Exploration

TIME
20 minutes

TEAM SIZE
3–5 people

MATERIALS
Sharpies, sticky notes

ANALYZE QUALITATIVE DATA

Qualitative data tells you what people experience and why. For rigorous analysis, organize and review your data as you collect it and look for key topics and patterns.

HOW TO

1. Make your qualitative data tangible with sticky notes, pictures, videos and diagrams.
2. Get the data up on the walls — visible and able to be moved around and grouped.
3. Review data immediately after gathering and then several times over the next couple of weeks.
4. Map your data on top of end user Journey Maps.
5. Create and update a "Top Ten" list of key issues, topics or stories you recognize in the data.
6. Create topic categories to organize evidence from your research.
7. Create a narrative for each category to portray what happens, what works, what doesn't and directions for ideation.

TIPS & TRICKS

Always get your data up on a wall, step back and reflect on what you see. Work with a colleague to ask questions of each other and of the data. Use one or more frameworks to organize your findings.

PAIRS WELL WITH

- Observation
- Show and Tell interviews
- Journey Mapping
- Empathy Map

HELPS ACHIEVE

Empathy, Exploration

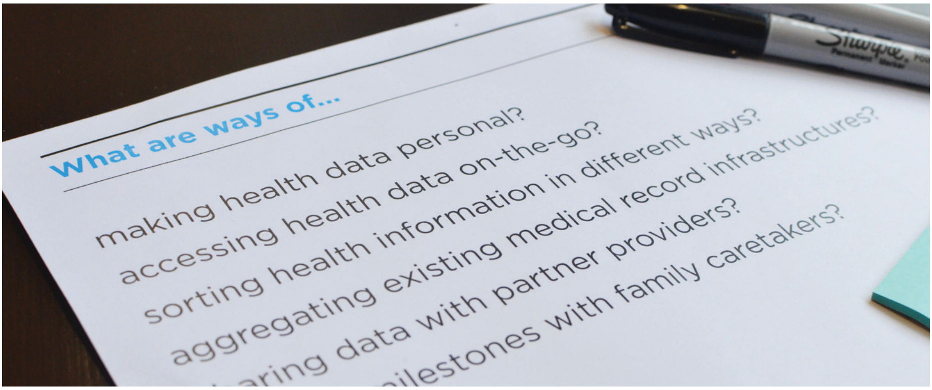
TIME
Numerous 45 min collaborative cycles.

TEAM SIZE
2–3 people

MATERIALS
Sticky notes, pictures from the field, video, notes.

QUESTION & REFRAME

"WAYS OF…" STATEMENTS



Don't jump to a solution when presented with a problem. Improve your team's ability to explore many varied ideas by writing "Ways of…" statements.

HOW TO

1. After spending time with users and the problem context, you will have identified both challenges and opportunity areas.
2. For each challenge, write a "Ways of…" statement.

   "We need ways of reducing wait times for urgent cases."
3. Sort the "Ways of…" statements into groups that might share similar types of solutions.
4. A group of similar "Ways of…" statements might suggest an overall approach to a solution.
5. Reflect and discuss which "Ways of…" groupings seem the most promising.
6. Seed your brainstorm sessions with these "Ways of…" statements to generate many possible ideas.

TIPS & TRICKS

Focus on a user-centered mindset—"users need ways of…"

If you find yourself with too many, edit ruthlessly. Just a few "ways of …" statements should generate hundreds of ideas.

PAIRS WELL WITH

- 3-Part Observation
- Concept Sheets
- Journey Mapping
- Service Prototype
- Collaborative Cycle

MINDSET OF

Exploration

TIME
30–120 minutes for multiples

TEAM SIZE
1–2 people

MATERIALS
Sharpies, sticky notes

QUESTION & REFRAME

ANALOGOUS EXAMPLES

A great way to break conventional thinking is to look at others who've already broken convention. Study how game-changers outside your industry have done it.

HOW TO

1. Look for people, products or services that are new, unique, or extreme in their approach.
2. Reflect and identify unique attributes of what they do and any conventions they break.
3. Identify some of the obstacles they face and how they overcame them.
4. Ask how their specific model or characteristics of what they do might be helpful to your own team's thinking.
5. Use a Collaborative Cycle to have small teams research and discuss the analogy and how it might apply.
6. Use analogies in pitches to help others see the possibility of defying convention.

TIPS & TRICKS

Try to find examples from related worlds that have structural or characteristic similarities to your own industry or situation. They are often the most powerful.

PAIRS WELL WITH

- Collaborative Cycle
- Elevator Pitch
- Pitch Deck

MINDSET OF

Exploration

Experimentation

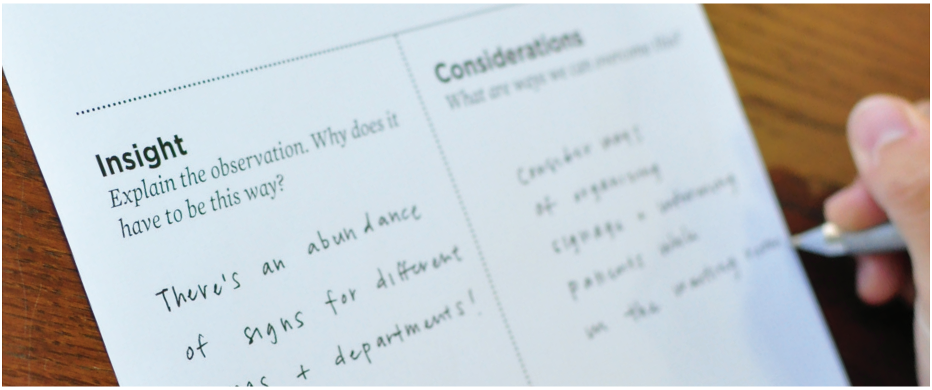
TIME
5-10 minutes per

TEAM SIZE
1–2 people or a group

MATERIALS
Internet, trend sites, what's new, classic disruptors

QUESTION & REFRAME

3-PART OBSERVATIONS



To communicate insights in more evocative ways, wrap your observations about users, situations, or industries in a 3-part structure.

HOW TO

1 Start with an observation. This should be something direct—a fact that seems almost obvious.

"People are bored and fidget as they wait in line..."

2 Now add an insightful reflection. It could explain the observation, call out an irony, or question why it has to be that way.

"...this is no surprise as there is little in the environment to engage with or warrant attention."

3 Third, add considerations or ideas that are ways of overcoming the insight.

"...consider ways of posting or sharing information that would be beneficial for those people to know."

TIPS & TRICKS

The real insight is in how you see everyday situations—not in seeing or discovering truly surprising behaviors.

PAIRS WELL WITH

- "Ways of…" Statements
- Observation
- Reviewing user video
- Brainstorms

MINDSET OF

Empathy

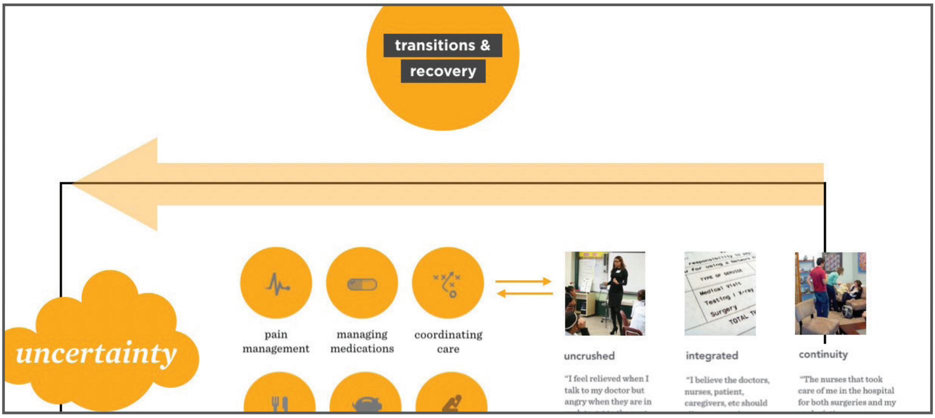
Exploration

TIME
2–3 minutes per

TEAM SIZE
1–2 people

MATERIALS
Pen, paper, a questioning mind

FRAMING OPPORTUNITY



Project research and analysis results in a lot of valuable information for your project. Frame your opportunity by prioritizing the challenges you will address.

HOW TO

1 Gather your list of insights, user journeys and information structure from your research.

2 With your team, discuss and vote on the most important areas to address in your ideation and solution creation.

3 Summarize these insights and challenges in a new diagram or presentation.

4 Now assess: If you address these insights and challenges, will you have a valuable solution? Iterate until you have a well-defined opportunity.

5 Now, write a series of "How might we...?" or "Ways of..." statements based on the details of the opportunity framing.

6 Use these targeted statements as a basis for ideation.

TIPS & TRICKS

Work with stakeholders to prioritize and confirm key issues.

Reflect on your current understanding vs. when you started.

PAIRS WELL WITH

- "Ways of" Statements
- Concept Sheets
- Journey Mapping
- Service Prototype

MINDSET OF

Exploration

TIME
90 minutes

TEAM SIZE
2-4 people

MATERIALS
Sharpies, sticky notes

IMAGINE & MODEL

STORYBOARDS

Storyboards are a great way to show existing or future customer experiences. They put problems and solutions in context and make them easier to communicate and assess.

HOW TO

1 Select an aspect of a customer experience you'd like to storyboard. Often this is informed by observation or an ethnographic interview.

2 Use sticky notes to brainstorm key steps of the customer experience. Draw a simple picture that captures key steps. Stick figures work great!

3 Organize the steps into three parts: setting the stage, exposing a problem, and showing its outcome.

4 If you have too many, reduce the number of steps to get at the essence of the experience.

5 Draft a script taking the viewer through the storyboard. Refine it until it's clear and concise.

6 Share the storyboard with others to get feedback. Use it to brainstorm ideas or evaluate a proposed solution.

TIPS & TRICKS

If the storyboard gets too long, break it into smaller sequences. Keep storyboards posted as an easy way to share customer experiences with each other and to foster conversation.

PAIRS WELL WITH

- Show & Tell Interview
- Journey Map
- Concept Sheets

MINDSET OF

Empathy

Exploration

Experimentation

TIME
30–60 minutes for a couple

TEAM SIZE
2–5 people

MATERIALS
Sharpies, sticky notes, half sheets

PAPER MODELS

Any idea you think has merit should be modeled in a tangible way as soon as possible. Paper models are a surprisingly easy and fast way to make your ideas real.

HOW TO

1 Use a core set of basic tools and materials: white paper, white cardboard, white tape, inkjet printer, scissors, and thin and thick markers.

2 Think about what demonstration and discussion the model should support. Work at an appropriate size and detail only what's necessary.

3 Think through how you could make it before jumping in. Do little experiments to see if the approach would work.

4 Try to create the model from as few parts as possible, assembling smaller sections, rather than making a "house of cards."

5 For web and app interfaces, use simple symbols to lay out content and details. Switch screens by replacing paper screens in sequence.

6 Demonstrate the concept with your paper prototype.

TIPS & TRICKS

Use all white materials. Forgo needless detail. You're not trying to make the real thing out of paper, only represent key aspects. Work quickly, but don't be sloppy. Craft matters a lot.

PAIRS WELL WITH

- Concept Sheets
- User Feedback with Prototypes

MINDSET OF

Exploration

Experimentation

TIME
30–120 minutes for multiples

TEAM SIZE
1–2 people

MATERIALS
Paper, cardboard

IMAGINE & MODEL

SERVICE PROTOTYPES

Service prototypes make the touchpoints of a new service offering tangible and allow you to test it with customers and other stakeholders.

HOW TO

1 Services are not intangible! We all interact with the touchpoints of a service: a website, a phone tree, a mobile app, a brochure, a place, etc.

2 To prototype a service, identify the ways users would discover, understand, and engage with it.

3 Make these different touchpoints using your paper prototyping skills. Web and app interfaces can easily be sketched.

4 If your service involves a place, arrange a room with tables, chairs, and paper signs to model that environment.

5 Demonstrate the service to colleagues, or better yet, have an outsider try to use an aspect of the service with your prototype.

6 Refine the prototype based on user feedback and try different versions to see how people react.

TIPS & TRICKS

Prototype one aspect of the service rather than the whole thing. Maybe it's just the sign-up process or another key part of the experience.

PAIRS WELL WITH

- Paper Models
- User Feedback with Prototypes
- Analogous Examples

MINDSET OF

Exploration

Experimentation

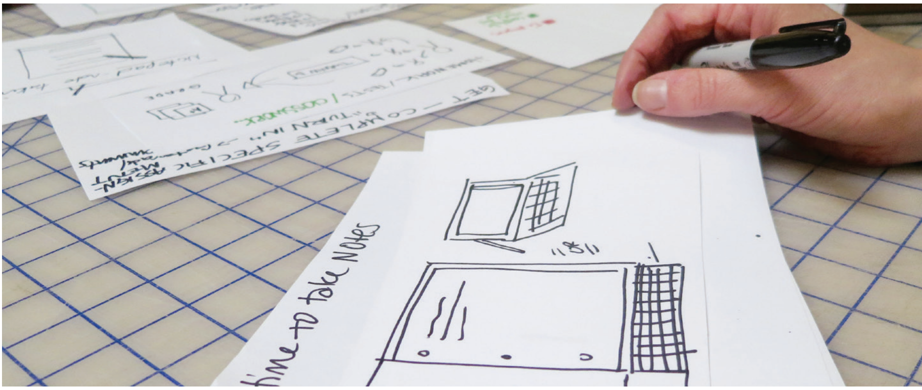
TIME
90–120 minutes for multiples

TEAM SIZE
2–3 people

MATERIALS
Paper, cardboard, furniture, easel pad, sticky notes

IMAGINE & MODEL

CONCEPT SHEETS



Capture ideas with a quick sketch and a provocative title. A concept sheet gets ideas out of your head and into a form that's easy to sort, share, and document.

HOW TO

1. Always have concept sheets around your project. Made from a half sheet of letter-sized paper, it should include a place for a title, sketch, name, and date.
2. During a brainstorm, get a stack of concept sheets and assemble a team of 5 to 7 people.
3. Create a focus for your brainstorm. "Ways of..." statements are great for this. They require ideas in response!
4. Get everyone going. Ask that all ideas be produced on a concept sheet.
5. Participants should "sketch out" a concept sheet and then hold it up to share with others.
6. Pin the concept sheet up on the wall after sharing.
7. After the brainstorm, review the concepts and group them according to similarity, difficulty, value, etc.

TIPS & TRICKS

Concept sheets, as opposed to a personal notebook, allow ideas to be shared with others and talked about.

Making concept sheets is habit-forming and improves your visualization and ideation skills.

PAIRS WELL WITH

- Affinity Clustering
- Brainstorms

MINDSET OF

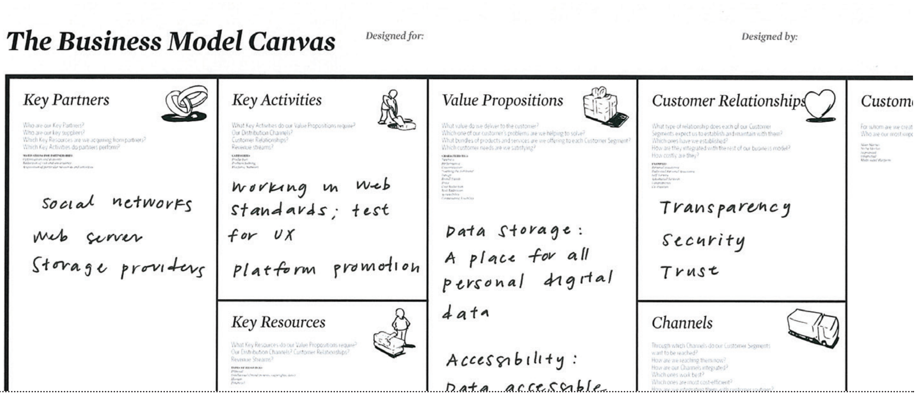
Exploration

TIME
2 minutes per

TEAM SIZE
1, or 5–7 people

MATERIALS
Sharpies, half sheets

BUSINESS MODEL CANVAS



The BMC is a set of key dimensions used by startups to track the definition of their offering. The canvas is updated regularly after running tests with customers.

HOW TO

1 Print a blank BMC template.

2 Use sticky notes to brainstorm five or more possible elements for each area of the canvas.

3 Step back with your team and discuss the most important elements. Debate which ones should be kept or eliminated and why. Note what you haven't thought much about.

4 Use this discussion to determine the next actions your team will take to test hypotheses or get other feedback from customers.

5 After completing each experiment or activity, update the BMC with what you've learned and determine your next experiment.

6 Share your business model canvas with leadership and ask for their advice and suggestions.

TIPS & TRICKS

Don't have too many elements in each area. The BMC should fit on one page and be readable! Treat the BMC as a live document, using it to assess where you're at and drive experimentation!

PAIRS WELL WITH

- Solution Maps
- User Feedback with Prototypes
- Pitch Deck

MINDSET OF

Experimentation

Entrepreneurship

TIME
30–90 minutes for first version
30 minute revisions

TEAM SIZE
1–2 people

MATERIALS
BMC Canvas, sticky notes, pens

USER FEEDBACK WITH PROTOTYPES

Put paper, service, and interactive prototypes in front of customers and other stakeholders to get their reaction to your solution concept.

HOW TO

1 When you have a prototype of a concept, even if it's just paper, have someone else try it.

2 Recruit a participant, provide them with context for the idea and ask them for their honest opinion.

3 Ask them to do something specific with the prototype—give them a task it supports.

4 As they try, have them talk out loud about what they are thinking, looking for, and trying to do.

5 Be helpful, but don't lead them in a direction you want to see. Observe how your prototype does or doesn't support your intended user tasks or experience.

6 When they stumble or can't move on, ask them what they are trying to do and what would be helpful.

7 After they've tried the prototype, talk more about what you're trying to do and solicit their advice.

TIPS & TRICKS

Design your prototypes to support user activity. It's okay for them to be simple and low fidelity—they should work like good props.

PAIRS WELL WITH

- Paper Models
- Service Prototypes
- Observation

MINDSET OF

Exploration

Experimentation

TIME
30–120 minutes with multiples

TEAM SIZE
1–2 people

MATERIALS
Paper prototypes, service prototypes, cardboard models

TEST & SHAPE

RAPID EXPERIMENTS

UIC Innovation Center

Look for simple ways to try out early ideas with users in the real world. You're not validating your ideas, but rather testing and shaping them quickly and iteratively.

HOW TO

1 Begin by articulating your insights, vision and idea on paper. Be specific and tangible.

2 Identify the riskiest assumptions in what you wrote and generate a list of potential solutions to them.

3 Brainstorm experiments that can be run quickly (starting today or tomorrow). Narrow down to one or two and describe what you're trying to learn.

4 Perform the experiment in the real world. Bring in multiple users to get feedback.

5 What did you learn about your hypotheses? Based on what you learned, what would you keep the same and what would you do differently?

6 Modify or completely change the experiment and try again to keep learning.

TIPS & TRICKS

Be scrappy and use what you have on hand. That includes the materials, locations, and potential users you already know.

PAIRS WELL WITH

- Paper Models
- Service Prototypes

MINDSET OF

Exploration

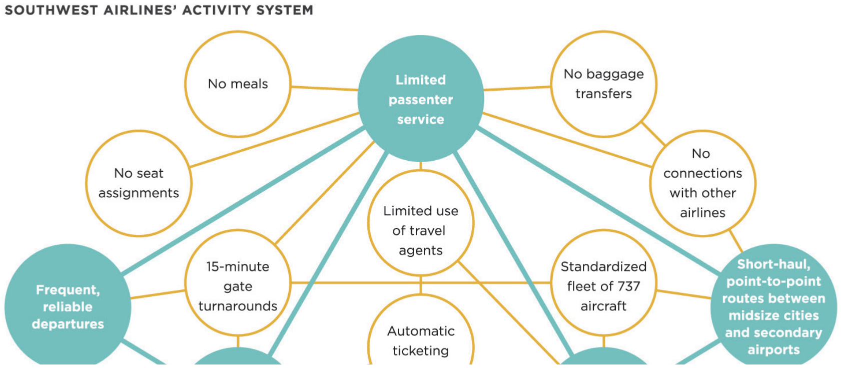
Experimentation

TIME
60–90 min, multiple rounds

TEAM SIZE
2-4 people

MATERIALS
Paper and serivce prototypes, cardboard models

SOLUTION MAPS



Michael Porter, "What is Strategy?," *Harvard Business Review*

Innovative solutions are more than a single idea. A solution map lays out all the key elements and characteristics of an offering that work together to implement a focused strategy.

HOW TO

1 Work out the first versions on a large easel pad with a chisel tip marker. Title the page with your solution concept.

2 Brainstorm elements of your solution on individual sticky notes. Title them clearly.

3 Reflect and choose the smaller ideas that are components or characteristics of the bigger, key elements.

4 Draw lines between ideas and elements that support or reinforce each other.

5 If you're fairly early in the project, use the map to stimulate additional ideas that would support the solution.

6 Reorganize as circles and lines on another page to make the overall map clearer.

7 Take time to share the map to get feedback.

TIPS & TRICKS

Use this exercise to get at the core elements of your solution. Be realistic with what you'll be able to implement. Annotate the map with questions, team responsibilities, etc.

PAIRS WELL WITH

- Concept Sheets
- Pitch Deck

MINDSET OF

Exploration

TIME
30–120 minutes for multiples

TEAM SIZE
1–2 people

MATERIALS
Chisel tip marker, easel pad

PITCH DECK

Once your project outgrows its incubation, use a well-structured 10-slide pitch deck to explain your concept, build support, and garner additional resources.

HOW TO

1 The Pitch. What's the essence of your solution? e.g. "Airbnb for ambulatory care".

2 The Problem. Describe the failures of the current situation and the opportunity for your solution.

3 The Solution. Illustrate how you'll solve the problem.

4 The Value. Show how many people could and would take advantage of your solution.

5 The Business Model. Outline the significant value your solution offers the organization.

6 The Key Elements. Explain the dimensions of your solution: technology, organizational change, etc.

7 Marketing. Explain how you'll get the word out.

8 Resources. Show what's needed for implementation.

9 Milestones. Walk through your roadmap and timeline for implementation.

TIPS & TRICKS

Get at the essence in every slide. Too much explanation devalues your solution. Test your pitch many times before going in for the big meeting. Look for experienced managers to provide feedback.

PAIRS WELL WITH

- Elevator Pitch
- Business Model Canvas
- Solution Maps

MINDSET OF

Experimentation

Entrepreneurship

TIME
A week or two to shape a pitch

TEAM SIZE
2–3 key players

MATERIALS
Powerpoint, Keynote, or Google Drive presentation

ELEVATOR PITCH

To build awareness for an initiative and find potential supporters, create a verbal summary you can share in under a minute. This conveys the essence of your idea.

HOW TO

1 The best pitches are simple, clear and compelling. You'll need to brainstorm, edit, and refine to get there!

2 Craft an opening statement. What is the one thing your audience should remember about your initiative?

3 Provide context. What's the problem or situation you're addressing? Why isn't that acceptable?

4 Describe the core solution. Share what's unique and valuable about what you're doing.

5 Describe your ultimate goal. What will be made possible if you're successful?

6 If you're asking for something, state it simply and specifically.

7 If your audience isn't able to help, ask them for a reference to someone they feel would be more appropriate.

TIPS & TRICKS

Say less in order to draw interest from your audience. Don't underestimate the power of ruthless editing. Make sure your whole team can share the elevator pitch.

PAIRS WELL WITH

- Pitch Deck
- Solution Map
- Paper Models

MINDSET OF

Experimentation

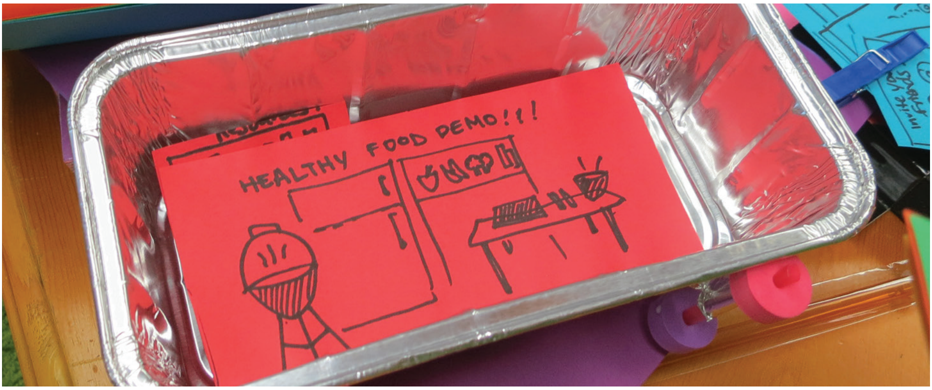
Entrepreneurship

TIME
60 minutes for first version

TEAM SIZE
1–2 people

MATERIALS
Chisel tip marker, easel pad, text editor

VALUING SOLUTIONS



Assessing and communicating the value of your solution is critical to shaping it for success and building support for it's implementation.

HOW TO

1 Take time to brainstorm the ways in which your solution creates value. Consider direct and indirect sources.

2 Consider the value users of the solution like patients, partners and staff receive. Use qualitative and quantitative measures like satisfaction, net promoter score, efficiency, convenience and preference.

3 Consider value received to the organization such as improvement of key objective, reduced costs, smoother workflows, reduction of risk factors, demonstration of leadership, etc.

4 Establish simple measures and targets for them that you would like to meet.

5 Design your prototypes to improve these measures and assess them while testing prototypes.

TIPS & TRICKS

A successful solution always creates new kinds of value.

Be honest about challenges the solution faces in creating that value.

PAIRS WELL WITH

- Elevator Pitch
- Business Model Canvas
- Solution Maps

MINDSET OF

Experimentation

Entrepreneurship

TIME
One work session, ongoing

TEAM SIZE
1-2 members

MATERIALS
Spreadsheets, simple surveys, video of testing

COLLABORATIVE CYCLE

Here's a simple and effective structure to get the most out of an assembled group of people. Use it as the basis for brainstorms and other generative meetings.

HOW TO

1 Remove distractions. Encourage attendees to shut computers down and stay engaged in the conversation.

2 Set context. Give the group some context on what you want them to do together—brainstorm ideas, review user video, sort information, receive feedback, etc. (5 min)

3 Get the content out! Start the exercise and have participants capture their insights on post-its or sketch ideas. One idea at a time. (30 min)

4 Step back to organize what was created. Encourage discussion by finding themes and identifying gaps that will move the team forward. (15 min)

5 Assign specific people tasks and deadlines to ensure progress. Follow up on their progress. (10 min)

TIPS & TRICKS

The collaborative cycle is a way of working that enables creative thinking. Don't let people talk their way through the time or 'nay say' ideas.

Encourage the team to think expansively and save critique for a designated time.

Ideas will build off of each other, so slow starts are okay.

TIME
45–60 minutes

TEAM SIZE
5–8 people

MATERIALS
Sharpies, sticky notes, half sheets

FACILITATING REFLECTIVE DISCUSSION

Working in teams requires facilitating critical discussion frequently among the group. Pose reflective questions, have people share more, and elicit pros, cons, and next steps.

HOW TO

1. Start with open questions. Use probes like: "What was interesting about what we did?" "Where do you see opportunity? challenges?"
2. Embrace silence. Give time for people to think and start contributing. It will seem like a long, silent pause—but be patient. Someone will fill the void.
3. Restate contributions and what you're hearing. Ask for differing points of view and encourage people to build on each other's thoughts.
4. Capture ideas, phrases and questions. Draw diagrams of what you're hearing. This helps people think about the content and contribute more.
5. Close with next steps. End the discussion with participants suggesting what to keep in mind as the project moves forward.

TIPS & TRICKS

Make sure other people are speaking more than you.

Don't allow debate.

While asking open-ended questions may feel vague, they lead to important contributions from participants.

TIME
15–20 minutes

TEAM SIZE
4–20 people

MATERIALS
Chisel tip markers, easel pad