

	<i>min.</i>	<i>style</i>	<i># of people</i>	<i>notes</i>
GETTING STARTED (Phase 0) [DW* 4-7]				
Define a Challenge (Phase 0-1) [DW 4]	30-60	reflective	2-3	This Gets You: opportunity framed as a design challenge
list possible topics				
frame the problem				frame as "how might we" questions
keep it simple				
Create a Project Plan (Phase 0-2) [DW 5-6]	20-30	reflective	2-3	TGY: clear timeline to guide your design challenges
sketch out end goals				consider what might be the deliverables of the project
define indicators of success				
establish constraints				
write a brief				
Create a Project Plan (Phase 0-3) [DW 7]		reflective	2-3	TGY: clear timeline to guide your design challenges
sketch timeline				
project checklist				what do you need to get in place to get started on project
<i>Prepare Before You Start</i>				
teams				start small; invite variety; assign roles; allow for alone time
spaces				dedicated space
materials				visual, tactile & experiential
DISCOVERY (PHASE 1) [DW 8-17]				
<i>Understand the Challenge (Phase 1-1)</i>				
Review the Challenge [DW 9]	10	reflective	2-3	TGY: clear, agreed upon design challenge expressed in one sentence
collect thoughts				ask yourself why people might need, want, or engage with topic
review constraints				
reframe the challenge				rewrite until approachable, understandable, actionable
create a visible reminder				
Share What you Know [DW 9]	30-45	reflective	2-3	TGY: overview of the team's knowledge and its open ?s
share what you know				use one piece of information per post-it note
define what you don't know				post these questions in a different area
build your knowledge & fill in the gaps				group post-it notes into themes & use to plan research

Build your Team [DW 10]	20-30	reflective	2-3	TGY: agreement on the team member's roles
share who you are				
define your individual & teams goals				
agree on roles				keep a visual reminder of conversations
give feedback				revisit agreement about team structure on a regular basis
Define your Audience [DW 10]	20-30	hands on	1-3	TGY: visual overview of all people relevant to the challenge
list immediate contacts				
think more broadly				
build an overview				
create a visual reminder				
Refine your Plan	20-30	hands on	1-3	TGY: calendar w/ agreements on team members' involvement & set timing
sketch a calendar				large paper calendar that everyone can see with tasks, meetings, finish dates
form agreements				define which times when team can best collaborate
create a visual reminder				
Prepare Research (Phase 1-2)				
Identify Sources & Places of Inspiration [DW 11]	20-30	reflective	2-3	TGY: research plan listing activities & people to learn from
imagine interesting people to meet				
think of extremes				consider people completely familiar with topic & those without anything to do with it
make a list of activities you want to do				learn from users, experts, peers observing peers, self-documentation, immersion, analogous settings
Select Research Participants [DW 12]	20-45	interaction	1-3	TGY: appointments to meet & learn from interesting people
describe the people you want to meet				create specific descriptions of the people who want to engage with
plan the interaction & logistics				think about what exactly you want to do with each participant
invite participants				prepare a script for your initial conversations to explain purpose of research

track your recruiting progress

create a checklist that helps everyone on your team keep an overview of the progress & scheduling

Build a Question Guide [DW 13-14]

20-30

hands on

2-3

TGY: question guide for a valuable research conversation

identify topics
develop questions
organize your questions
create a question guide that is readable
build tangible conversation starters
confirm your plans

brainstorm themes you want to learn about your conversation with research participants
frame open-ended questions and avoid yes/no questions
start specific, go broad, probe deep

assign roles
prepare your equipment

designate person to lead the conversation; 2nd to observe body language; 3rd to take notes/photos

Prepare for Fieldwork [DW 15]

15-20

hands on

1-3

TGY: solid plan for your fieldwork activities

confirm your plans
assign roles
prepare your equipment

Tips

establish trust with participants
get the most out of your interactions
know what to look for
capture what you see

Gather Inspiration (Phase 1-3) [DW 16-17]

Immerse Yourself in Context

30-60

hands on

2-6

TGY: skills for learning from what's around you

plan your observations
explore and take notes
capture what you see

Seek Inspiration in Analogous Settings

20-90

hands on

2-3

TGY: new perspective on the challenge you work on, inspiration and energy

think of analogies that connect with your challenge

list all activities, emotions, behaviors that make up experience & write down similar situations

make arrangements for your activities
absorb the experience

Learn from Experts

60-120 interaction 2-3

observe peoples' activities & their environments
TGY: access to in-depth knowledge in a certain area of expertise

choose the participants
set up for a productive conversation

choose experts based on objectives

Learn from Users

45-90 interaction 2-3

TGY: in-depth insight in the user's needs and motivations

learn from individuals

create trusted atmosphere; pay attention to atmosphere;
capture immediate observations; get continuous feedback
plan the documentation activities; invite & instruct
participants; review with participants

learn from peoples' self-documentation

choose the participants; set up for conversational
atmosphere; listen to & capture immediate observations; get
cont. feedback

learn from groups

select research partners; decide on compensation; guide
research; meet frequently

learn from peers observing peers

INTERPRETATION (PHASE 2) [DW 18-23]

Tell Stories (phase 2-1)

Capture Your Learnings [DW 19]

20-30 reflective 2-3

TGY: authentic recollection of your learnings from the research activities

find a space & time

to cover important topics with prompts (personal details,
interesting stories, motivations, frustrations, interactions)

share your impressions
document your thoughts

Share Inspiring Stories [DW 20]

30-60 hands on 2-3

TGY: shared understanding of all stories team collected

set up a space
take turns

prompts: personal details, interesting stories, motivations,
barriers, interactions

tell the story of each person
actively listen
capture the information in small pieces

surround yourself with stories

Search for Meaning (phase 2-2)

Find Themes [DW 21]	20-50	reflective	2-5	TGY: overview of the larger themes found in the research group findings from file research into clusters name the clusters
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cluster related information
find headlines
turn headlines into statements

Make Sense of Findings [DW 21]	25-60	reflective	2-5	TGY: understanding of what your learnings from the research really mean
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look for links between themes
dig deeper
get input from the outside
be prepared to let go

Define Insights [DW 22]	45-90	reflective	2-3	TGY: insights that concisely communication your research findings
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select what surprised you
reconnect the learnings to your challenge
craft your insights
get an outside perspective

Frame Opportunities (phase 2-3)

Make Insights Actionable [DW 22]	15-30	reflective	2-3	TGY: brainstorm questions that respond to insights found
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develop "how might we" questions
choose brainstorm questions

Create a Visual Reminder [DW 23]	20-45	hands on	2-3	TGY: visual representation of your insights
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experiment with various visualizations
test your framework

IDEATION (PHASE 3) [DW 24-30]

Generate Ideas (phase 3-1)

Prepare for Brainstorming [DW 25]	10-20	hands on	1-2	TGY: setup for a dynamic 45-60 min. brainstorming session
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start with a well-defined topic
 choose an appropriate space
 provide tools to capture ideas
 invite a diverse group of people

Facilitate Brainstorming [DW 26] **45-60** **hands on** **6-10** **TGY: lot of fresh, new ideas**

select a facilitator
 present your topic
 introduce the rules of brainstorming
 equip everyone for participation
 start with a warm-up
 move one by one
 keep the energy high

post the question you are brainstorming about on wall

Select Promising Ideas [DW 27] **10-20** **hands on** **6-10** **TGY: selection of ideas that the whole team is excited about taking forward**

cluster the ideas
 vote for favorite ideas
 discuss the results

immediately after a brainstorming session
 ask participants to select personal favorite
 count votes & determine most popular ideas

Sketch to Think [DW 28] **15-25** **hands on** **2-8** **TGY: first, tangible expression of your idea**

pick an idea
 expand the idea
 share back

brainstorm simple ways to bring concept to life

Refine Ideas (phase 3-2)

Do a Reality Check [DW 29] **25-40** **reflective** **2-4** **TGY: 1st step toward bringing your idea to life**

find out what your idea really is about
 list constraints
 brainstorm new solutions
 evolve your idea
 archive ideas

examine what's at the core of your idea
 make list of challenges and barriers

Describe Your Idea [DW 30] **15-25** **hands on** **2-3** **TGY: description of your idea that summarizes all of its important aspects**

capture your thoughts
evolve your summary

choose title; summarize in 1 sentence; describe how idea would work; name people involved; explain needs & opportunities; illustrate value/benefit; list questions change & adjust concept description continuously

EXPERIMENTATION (PHASE 4) [DW 31-37]				
<i>Make Prototypes (phase 4-1)</i>				
Create a Prototype [DW 32]	45-90	hands on	2-4	TGY: tangible representation of your idea that you can share & learn from
create a storyboard, diagram, story, ad, mock-up, model, role-play, etc.				
<i>Get Feedback (phase 4-2)</i>				
Identify Sources for Feedback [DW 33]	15-25	hands on	2-4	TGY: plan for feedback activities
consider the setting define what to test define feedback activities				
Select Feedback Participants [DW 33]	20-45	hands on	2-4	TGY: activities & appointments for feedback on prototype
decide on who to involve plan the interaction and logistics invite participants				
Build a Question Guide [DW 34]	20-30	hands on	2-4	TGY: guide to getting most out of feedback conversations
choose open questions frame questions to encourage build arrange your question guide				
Facilitate Feedback Conversations [DW 35]	30-60	interaction	2-4	TGY: constructive feedback on prototype
invite honesty and openness provide multiple prototypes stay neutral				

adapt on the fly

encourage participants to build on idea & change prototype

Capture Feedback Learnings [DW 35]

20-35

reflective

2-4

TGY: summary of new ideas & perspectives on how to improve concept

find space and time

capture your ideas & design iterations

share your impressions

consider prompts

Integrate Feedback [DW 36]

20-40

reflective

2-4

TGY: iterations of concept based on feedback

cluster the feedback

evaluate the relevance

iterate your prototype

go through feedback cycles repeatedly to improve concept

Identify What's Needed [DW 37]

30-45

hands on

2-4

TGY: what it takes to realize the idea

specify materials

calculate funds

estimate timeframes

identify people and partners

create overview of people who can help realize idea

choose a plan of action

EVOLUTION (PHASE 5) [DW 38-47]

Track Learnings (phase 5-1)

Define Success [DW 39]

20-45

reflective

2-4

TGY: criteria to evaluate the success of your concept

consider the people involved

revisit initial overview of the audience

identify indicators for success

track what happens

plan how to track impact indicators

Document Progress [DW 40]

30-60

hands on

2-4

TGY: evidence of impact the concept is creating over time

track signs of change

observe indicators of change over time

share stories

arrange reflection meetings with team

discuss effects

compare impressions with initial circumstances

celebrate achievements

Move Forward (phase 5-2)

Plan Next Steps [DW 41]

30-45

hands on

2-4

TGY: calendar outlining team members' involvement in realizing concept

- list tasks
- assign champions
- identify gaps
- create a timeline
- plan regular check-ins

Engage Others 30-60 interaction 2-4 **TGY: audience-specific way to engage others w/ design challenge**
Pitch Your Concept (optional) [DW 42]

- know your audience
 - highlight the potential
 - build a narrative
 - communicate the value
 - encourage contribution
- create a provocative statement for idea
tell brief & engaging story

Build Partnerships (optional) [DW 43]

- specify your needs
 - identify partners
 - structure the collaboration
 - learn from each other
- create overview of organizations or individuals that have capabilities that team is missing
adapt pitch story to share excitement about idea with new partners & communicate hopes for collaboration

Share Your Story [DW 44-46]

- collect memories
- build a narrative
- spread your story

Build a Community [DW 47]

- build a network
 - plan check-ins
 - learn over time
- invite people to participate in design community
checking-in can be virtual/in-person but must be scheduled

* DW = Designer's Workbook