HCD for CX

A Rios Partners Field Guide
for using human-centered design
to improve customer experience

Frame Phase

Contents

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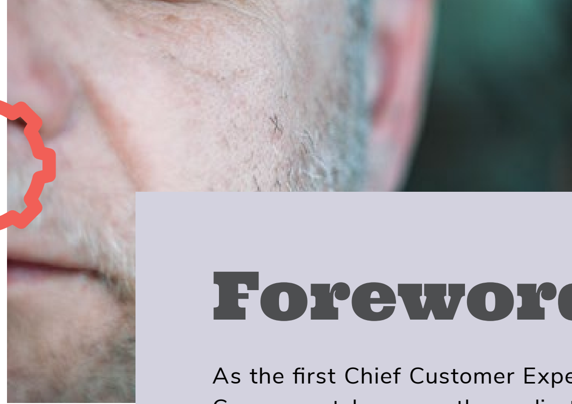
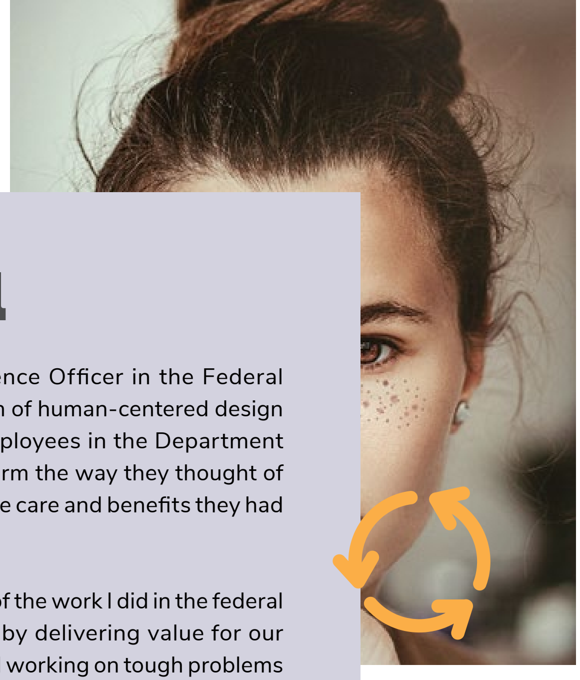
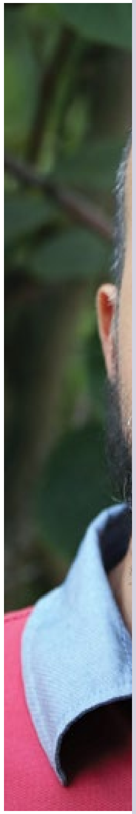





Foreword

As the first Chief Customer Experience Officer in the Federal Government, I oversaw the application of human-centered design (HCD) principles across 360,000 employees in the Department of Veteran Affairs—helping to transform the way they thought of and served veterans in the access to the care and benefits they had earned with their service.

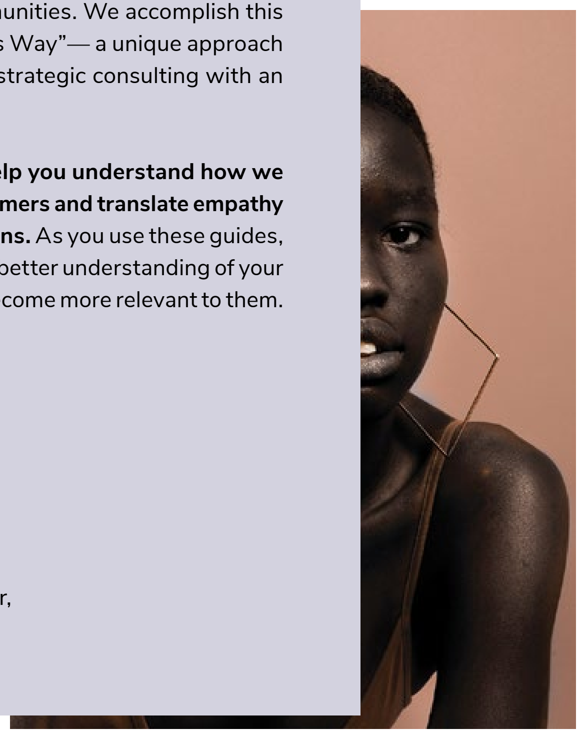
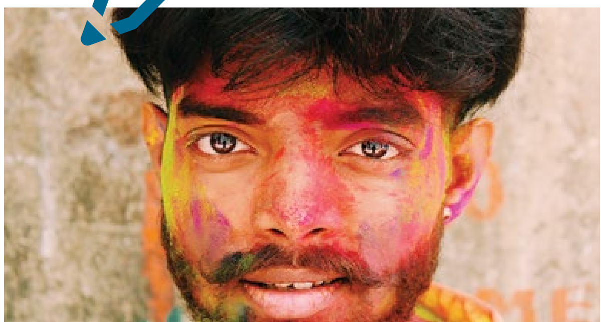
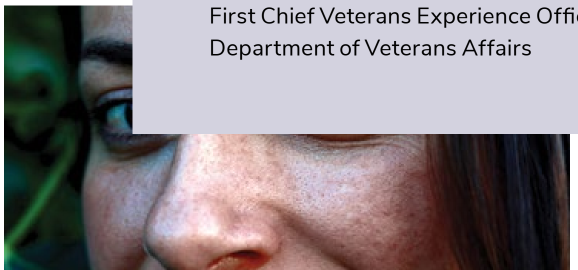
Rios Partners' mission is an extension of the work I did in the federal government: create positive change by delivering value for our clients, investing in our employees, and working on tough problems that benefit our local and global communities. We accomplish this mission through what we call the "Rios Way"— a unique approach to advising our clients that combines strategic consulting with an empathy-driven, design consulting.

These field guides are designed to help you understand how we use HCD to develop empathy for customers and translate empathy driven insights into innovative solutions. As you use these guides, we hope you and your teams develop a better understanding of your customers and find practical ways to become more relevant to them.

Tom Allin
Senior Advisor, Rios Partners

40+ year restaurant executive

First Chief Veterans Experience Officer,
Department of Veterans Affairs


Introduction to Customer Experience

What is customer experience and why does it matter?

Excellent customer experience (often referred to as CX) allows organizations to stay relevant to their customers by meeting the right customer needs at the right time. To do this, a designer must first develop empathy for their customer.

At Rios, we describe empathy as the opposite of an assumption. It requires setting aside your own perspective and trying to walk a mile in someone else's shoes. Empathy is not feeling sorry for someone or thinking about what you would do in their situation. HCD is a methodology for developing empathy for customers, using that empathy to design innovative solutions that meet their needs, and, ultimately, becoming relevant.

Using HCD to understand what customers need

The goal of CX design is to arrive at solutions that meet three criteria:

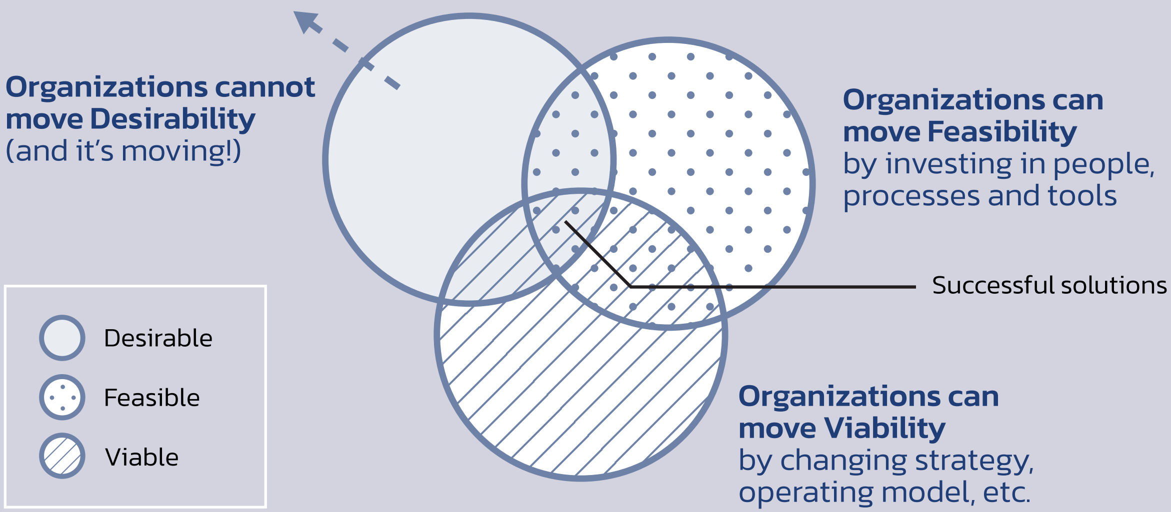
1. First, they must be **desirable**, meaning they meet the needs of customers.
2. Second, they must be **feasible**, meaning the organization has the capabilities needed to implement them.
3. Finally, they must be **viable** for the organization, meaning they align with business and strategic priorities.

The challenge: losing track of "desirable"

Desirability is a moving target because customer needs are always changing. Furthermore, organizations cannot control this movement. Effective designers can sometimes reveal needs customers may not have been aware of, but those needs existed and evolved in ways that typical organizations cannot control. This complicates efforts to be relevant to customers, causing organizations to fall into two types of "traps."

Trap 1: Only focusing on what you can control and losing track of desirability as it moves.
Organizations can control feasibility by investing in people, processes, and tools. Similarly they can control viability by changing their core business objectives. This ability to control these things can lead to solutions that optimize for what's feasible and viable (organization-centric design) or engaging in endless optimization initiatives. If these efforts lead to desirable solutions, it's only by chance, not design.

Trap 2: Assuming you already know what the customer needs and misplacing what's desirable.
Have you ever heard someone say "I've worked here for 20 years, I know what the customer needs"? Such statements are often based on assumptions, outdated data and / or shallow customer interactions. Building empathy is a never-ending process that requires the designer to constantly gather new data and update their understanding of the customer's needs. To control for assumptions overriding new information, the design must be intentional about approaching a customer each time with newfound curiosity.



The Question:
How can an organization create a real-time, unified view of what the customer needs (as defined by the customer)?

The Opportunity:
Implementing a CX strategy that enables an organization to track and design for customer needs as a part of the normal course of business.

At Rios, we help our clients implement a CX strategy framed by answering four key questions:

1 What is the desired mindset across the organization?

2 What is our process to understand and improve CX?

3 How do we measure CX?

4 Who owns the "Voice of the Customer?"

Answering these four questions enables an organization to align an entire team around a common vision for delivering excellent CX. This strategy is designed to prioritize understanding desirability. Using this understanding, an organization can then decide whether and how to shift resources and strategy (feasibility and viability) to increase its relevance to customers.

Organizations that do this as a part of the normal course of business become "self-calibrating." They deliberately incorporate the voice of their customer into relevant decision-making forums. This enables the organization to be agile in adjusting its strategy and resourcing in real-time, ensuring relevance for the long term.

The four elements of an effective CX strategy

1

What is the desired mindset across the organization?

What is the mindset you want every employee across your organization to share? Answering this question will enable you to align your design teams around common objectives and ensure everyone is pointing towards the same "north star."

Two elements you will want to consider when defining the desired mindset are:

- **Function vs. Purpose:** Make sure your organization is aligned not only around **function** (what you do) but also **purpose** (why you are doing it and who it serves). A clearly defined purpose gives employees flexibility on how to execute towards that purpose, allowing them to own the mandate of delivering on excellent experience for the customer. Furthermore, each employee should be able to directly tie their function to the organization's purpose.

- **Service vs. Experience:** Think beyond the service your organization provides to customers to the holistic experience you want customers to have. How do you want a customer's end-to-end experience with your organization to feel? How will improving a customer's experience advance your organization's purpose? And how are you aligning your employees around this common vision?

2

What is the process to understand and improve the customer experience?

At Rios, we use the HCD methodology to develop empathy for customers and translate this empathy into innovative solutions that meet their needs. HCD also provides tools for understanding and empathizing with the front-line employees who are responsible for delivering an excellent customer experience.

The Rios Partners HCD field guides detail the five phases of the HCD process that form our approach to understanding and improving the customer experience: **Frame** the problem, **Discover** customer needs, **Design** solutions to meet those needs, **Implement** solutions, and measure how solutions **Perform**.

In addition to offering step-by-step guidance and tools for executing the HCD process, our field guides also emphasize three key elements of the HCD approach that you should apply throughout any project:

- **Empathy**: Setting aside your own assumptions to build a deep understanding of the customer's experiences

- **Iteration**: Starting with what you can build quickly and adjusting based on feedback

- **Flexibility**: Adapting the HCD process to suit your needs and pivoting your perspective based on new information.

3

How do we measure the customer experience?

There are dozens of measurement frameworks that organizations can use to measure success, but they all boil down to assigning measurable values to a common set of elements. There are **inputs** (what you do), **outputs** (the immediate results of your actions), and **outcomes** (the larger goals that your outputs drive towards). For example, the input of lighting a match might lead to the output of starting a fire, which might drive the larger outcome of staying warm.

A successful CX measurement strategy focuses on inputs, outputs, and outcomes, but is grounded in empathy. Inputs are what your organization does (think about the organization's "function") to create an experience, the output is the experience itself, and outcomes are the goal being met as a result of the experience (think about the organization's "purpose"). Referring again to “starting a fire," a good CX measurement strategy would not only consider “starting a fire” as a success, but would measure the holistic experience. For example, how easy it was for customers to start the fire or to maintain it to keep warm.

4

Who owns the “Voice of the Customer?”

Finally, a successful CX strategy should include a plan for a designated person or team to bring the Voice of the Customer to the key forums at your organization where you make customer-relevant business decisions.

Using the HCD process to solve specific challenges is valuable. Consistently elevating the voice of the customer throughout the organization can be transformational.

What to expect from these Field Guides:

A step-by-step process to become relevant to your customers

The Rios Partners HCD field guides provide a high-level overview of the five phases of the HCD process:

Frame Discover Design Implement Perform

The guides help readers navigate the second strategic element of CX strategy, the HCD process, with an emphasis on both why we do each step and how to execute it successfully. You will also see references to the other three elements of CX strategy throughout (mindset, measurement, and owning the Voice of the Customer).

Each field guide begins with an overview of the phase objectives, provides guidance on how to apply the HCD approach, and offers a set of questions to answer before moving on to the next phase.

You can use the five field guides independently, but they work best when used together as an end-to-end process.

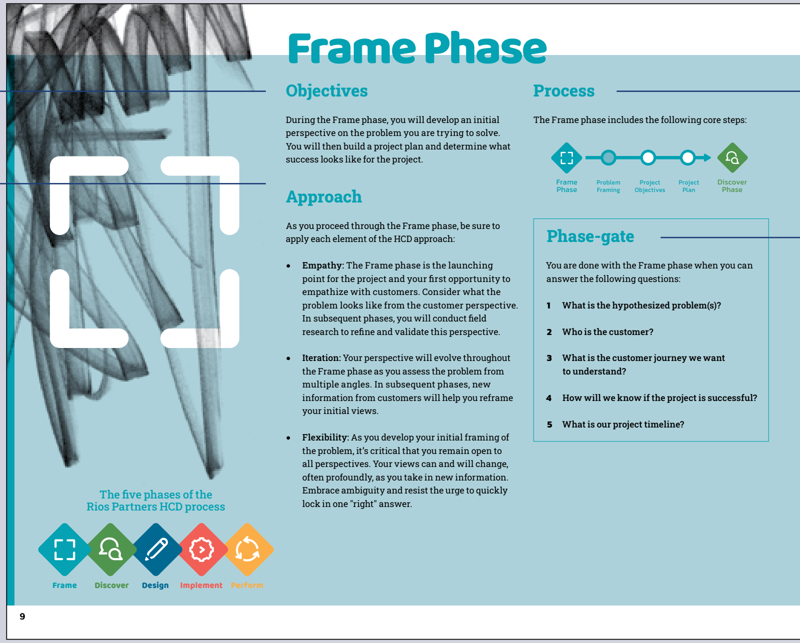
Within each phase, a critical path of core steps guides you through the HCD process. Additional steps inform and enhance the critical path, ensuring that you develop a comprehensive solution to the challenges you're addressing.

Objectives

Each phase starts with a north star, guiding your team throughout the process

Approach

Throughout each field guide, we outline a set of principles related to empathy, iteration, and flexibility to help your team



Frame Phase

Objectives

During the Frame phase, you will develop an initial perspective on the problem you are trying to solve. You will then build a project plan and determine what success looks like for the project.

Approach

As you proceed through the Frame phase, be sure to apply each element of the HCD approach:

- **Empathy**: The Frame phase is the launching point for the project and your first opportunity to empathize with customers. Consider what the problem looks like from the customer perspective. In subsequent phases, you will conduct field research to refine and validate this perspective.
- **Iteration**: Your perspective will evolve throughout the Frame phase as you assess the problem from multiple angles. In subsequent phases, new information from customers will help you reframe your initial views.
- **Flexibility**: As you develop your initial framing of the problem, it's critical that you remain open to all perspectives. Your views can and will change, often profoundly, as you take in new information. Embrace ambiguity and resist the urge to quickly lock in one "right" answer.

Process

The Frame phase includes the following core steps:

Frame Phase → Problem Framing → Project Objectives → Project Plan → Discover Phase

Phase-gate

You are done with the Frame phase when you can answer the following questions:

1. **What is the hypothesized problem(s)?**
2. **Who is the customer?**
3. **What is the customer journey we want to understand?**
4. **How will we know if the project is successful?**
5. **What is our project timeline?**

The five phases of the Rios Partners HCD process

Frame Discover Design Implement Perform

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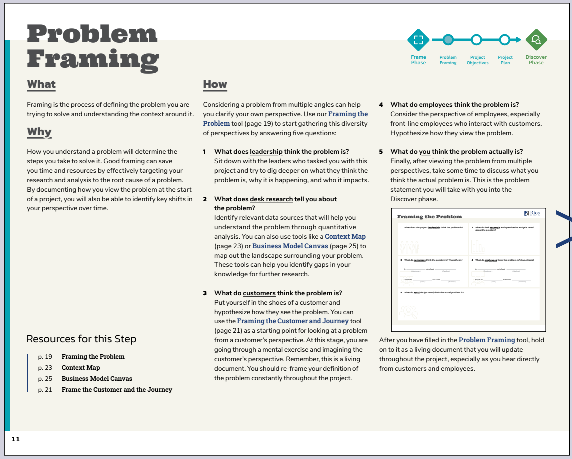
Process

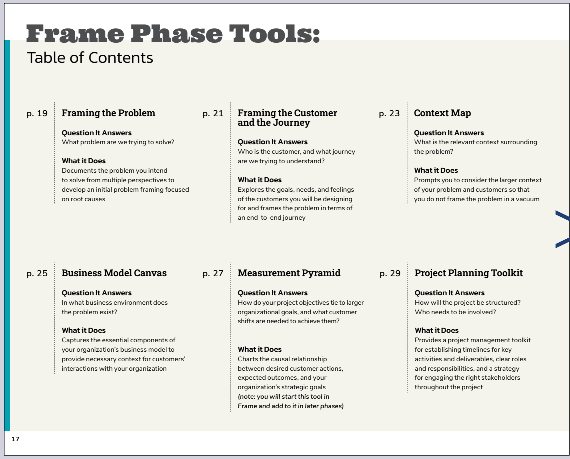
There are varying tools and paths your team will take to meet the phase objective. However, there is a critical path of must do steps to follow

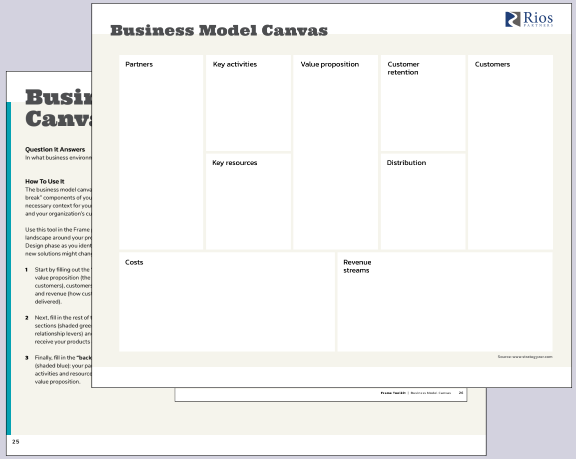
Phase Gate

Our clients often ask us, "how do I know when to go to the next phase?" For each phase, we outline a set of questions that, if answered confidently, let you know you are ready for the next step in the process

The appendix of each field guide contains tools and templates along with step-by-step guides for you to use and adapt as you apply the HCD process.







Step-by-step Guide

For each step in the critical path, you will find an in depth description of what your team should do, with tools to help you do it.

Tools

As you use each field guide, you may want to leverage tools outside of the critical path. You can find additional tools and exercises in the appendix, including explanations for when and how to use them.

Templates

As you go through the steps to use any tool, you will find templates that make group work easy. You can write on the field guides directly, screen shot and paste them into a virtual whiteboard, or even create a large printout and put them on your conference room wall as you work together with your team.

Frame Phase

Objectives

During the Frame phase, you will develop an initial perspective on the problem you are trying to solve. You will then build a project plan and determine what success looks like for the project.

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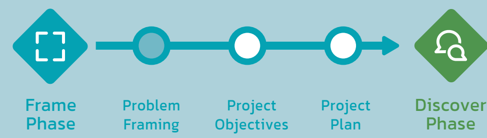

Phase-gate

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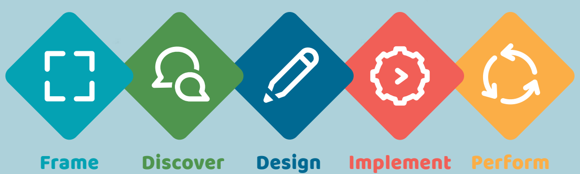
The five phases of the Rios Partners HCD process



Problem Framing

What

Framing is the process of defining the problem you are trying to solve and understanding the context around it.

Why

How you understand a problem will determine the steps you take to solve it. Good framing can save you time and resources by effectively targeting your research and analysis to focus on the root cause of a problem. By documenting how you view the problem at the start of a project, you will also be able to identify key shifts in your perspective over time.

Resources for this Step

p. 19 **Framing the Problem**
p. 23 **Context Map**
p. 25 **Business Model Canvas**
p. 21 **Frame the Customer and the Journey**

How

Considering a problem from multiple angles can help you clarify your own perspective. Use our **Framing the Problem** tool (page 19) to start gathering this diversity of perspectives by answering five questions:

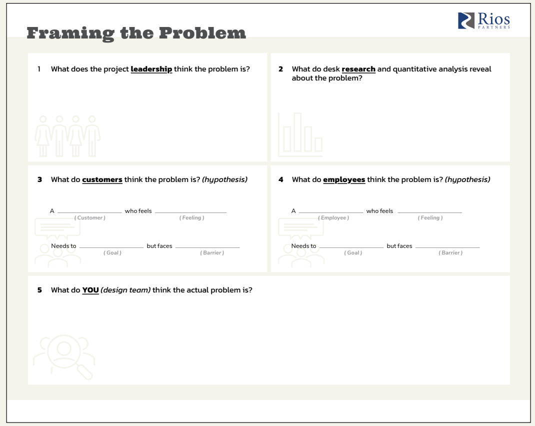
1. **What does leadership think the problem is?**
Sit down with the leaders who tasked you with this project and try to dig deeper on what they think the problem is, why it is happening, and who it impacts.

2. **What does desk research tell you about the problem?**
Identify relevant data sources that will help you understand the problem through quantitative analysis. You can also use tools like a **Context Map** (page 23) or **Business Model Canvas** (page 25) to map out the landscape surrounding your problem. These tools can help you identify gaps in your knowledge for further research.

3. **What do customers think the problem is?**
Put yourself in the shoes of a customer and hypothesize how they see the problem. You can use the **Framing the Customer and Journey** tool (page 21) as a starting point for looking at a problem from a customer's perspective. At this stage, you are going through a mental exercise and imagining the customer's perspective. Remember, this is a living document. You should re-frame your definition of the problem throughout the project.

4. **What do employees think the problem is?**
Consider the perspective of employees, especially front-line employees who interact with customers. Hypothesize how they view the problem.

5. **What do you think the problem actually is?**
Finally, after viewing the problem from multiple perspectives, take some time to discuss what you think the actual problem is. This is the problem statement you will take with you into the Discover phase.


Framing the Problem

Rios PARTNERS

1 What does the project **leadership** think the problem is?

2 What do desk **research** and quantitative analysis reveal about the problem?

3 What do **customers** think the problem is? *(hypothesis)*

A ______ (Customer) who feels ______ (Feeling)

Needs to ______ (Goal) but faces ______ (Barrier)

4 What do **employees** think the problem is? *(hypothesis)*

A ______ (Employee) who feels ______ (Feeling)

Needs to ______ (Goal) but faces ______ (Barrier)

5 What do **YOU** *(design team)* think the actual problem is?

After you have filled in the **Framing the Problem** tool, hold on to it as a living document that you will update throughout the project, especially as you hear directly from customers and employees.


MEASURED IN

Project Objectives

What

In this step, you will hypothesize how the outcomes of the project will drive the organization toward fulfilling its purpose. You will also hypothesize the experiences and Moments that Matter to your customers.

Why

As the project progresses, your perspective on what matters to customers and the desired project outcomes will change. In the end, you will see how developing deep empathy and understanding for your customers drives your organization to fulfill its purpose.

Setting clear objectives up front will help guide decision-making over the course of the project. A vision of what success looks like aligns the team and ensures you stay on track to build solutions that support your organization's strategic goals.

How

1 Start with the top row of the Pyramid and write down the purpose of your organization. This is the north star of your organization, indicating why the organization exists (e.g., a hospital sustaining healthy, thriving communities and building trusted relationships with those who need medical care) as opposed to what your organization does (e.g., providing comprehensive medical services).

2 In the second row, list the desired outcomes you hope to see if you are successful in solving the problem you've framed. Think of these as project KPIs that connect to the organization's purpose **(e.g., patients receive the correct treatment successfully the first time as measured by readmission rates)** These should be linked to strategic outcomes your organization has already outlined.

3 Then, consider what actions you would like customers to take in order to achieve the desired outcomes (i.e., outputs). For example, in order to achieve better clinical outcomes, you might want to increase consistency in patient check-ups. As you identify outputs, be sure to draw a line to the outcome(s) the output is connected to.

4 Once you identify the actions you would like customers to take, identify the experience they need to have in order to take those actions (i.e., moments that matter). For example, you may hypothesize that making it easier for patients to schedule an appointment will drive increased consistency in patient check-ups. Be sure to connect the moments that matter to the outputs they are related to. Remember, these are hypothesized moments that matter. You will solidify these once you get through the Discover phase.

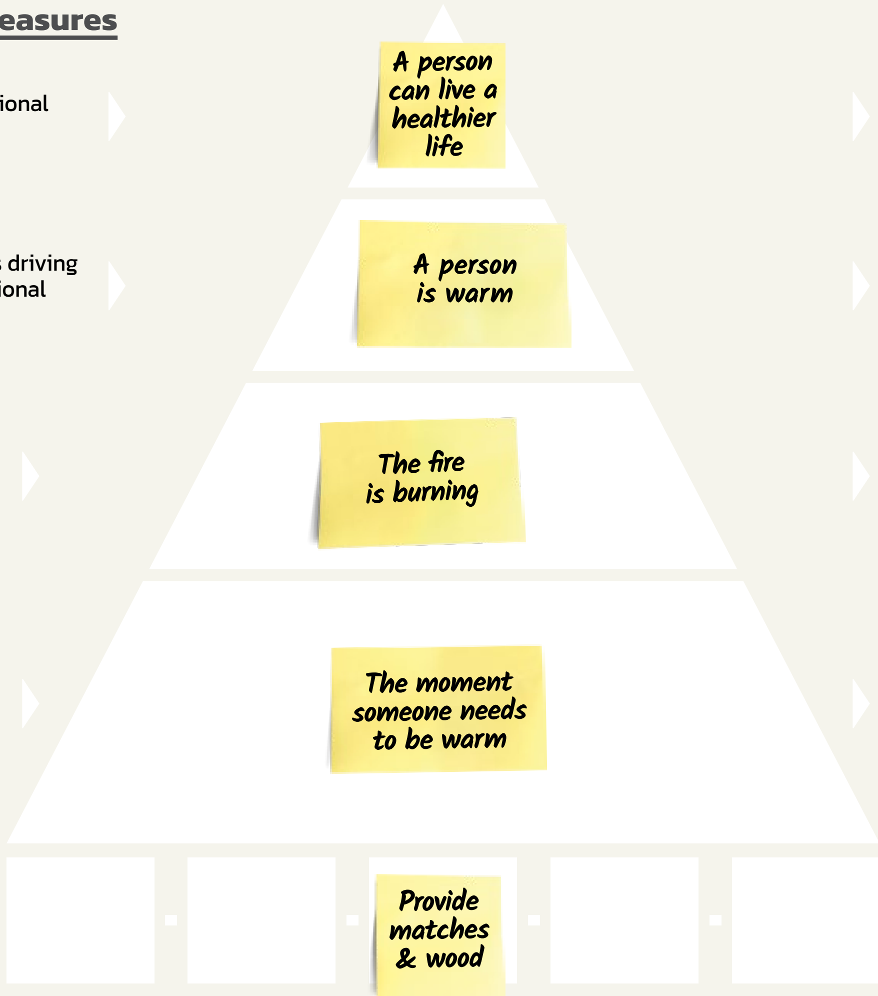
5 Finally, there are the solutions that will improve customers experiences, drive action, lead to outcomes, and help your organization fulfill its mission. **DO NOT FILL THIS IN YET**. Remember, no solutions before Discovery. We will come back to connect solutions to moments that matter in the Implement phase.

Resources for this Step

p. 27 **Measurement Pyramid**

Measurement Pyramid

Levels of measures



1 Organizational purpose

2 Outcomes driving organizational purpose

3 Outputs

4 Customer Journey

5 Solutions

Measurements

As measured by:
Why does your organization exist?

As measured by:
What are the key things you measure to determine whether your organization is fulfilling its purpose (think KPIs or objectives of OKRs)?

As measured by:
KPIs (e.g., the “key results” of OKRs) that lead to the desired outcomes and allow you to determine if your solutions + customer experience are delivering the desired results.

As measured by:
What is the customer experience?

Emotion: I felt **(emotion)** throughout **(action performed).**

Ease: It was easy to **(output action)** with **(whom or what).**

Effectiveness: I successfully did **(output action)** with **(whom or what).**

What are the key touchpoints that have a disproportionate impact on the customer's experience?

As measured by:
Are the products and services working as they should?

1. The quality of the solution
2. The performance or speed of the solution
3. The cost of the solution

Project Plan

What

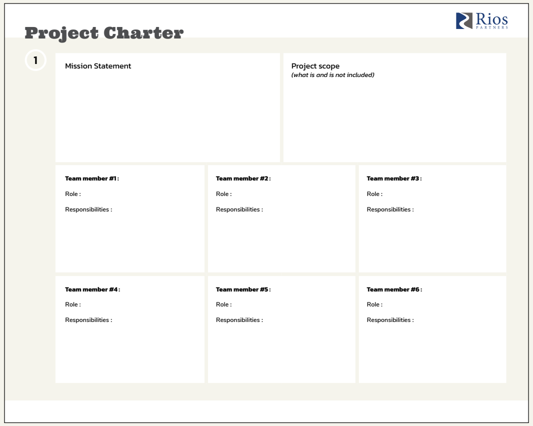
A project plan helps you establish the timeline and activities required for each phase of a project, designates your team's roles and responsibilities, and ensures that you are prepared to engage relevant stakeholders.

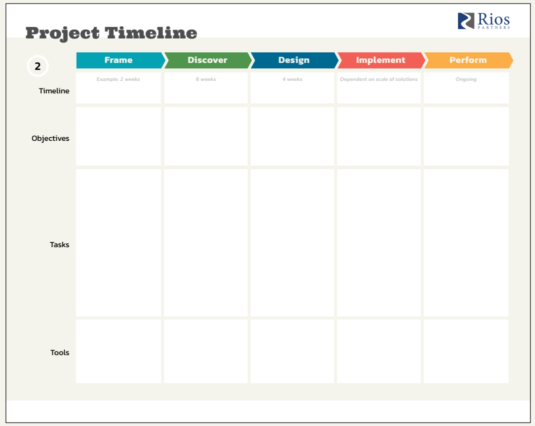
Why

It's important to align the team on timelines, roles, and workplans to keep everyone accountable to stay on track toward project goals and deliverables. Identifying and engaging important stakeholders early on will broaden your team's perspective and help give a sense of ownership and involvement to the key decision-makers you will rely on later to support your solutions.

How

Use the **Project Planning Toolkit** to develop your full project plan. The tools will walk you through the following components:



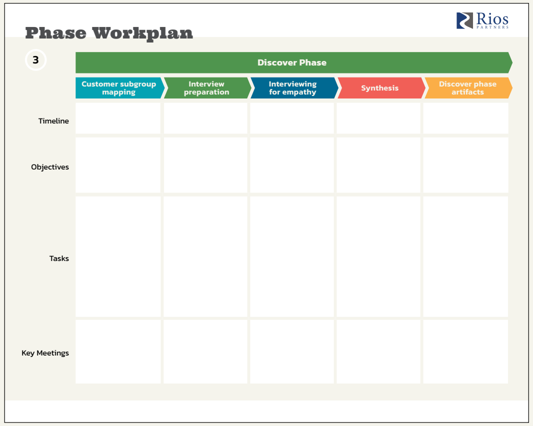


1 Charter
Draft a project charter and mission statement assigning roles and responsibilities to team members, including oversight from project leaders

2 Project Timeline
Then, plot the project timeline phase by phase. Make sure to note what you plan to do in each phase as well as how long it will take (e.g., framing will take 2 weeks). Note: if you decide on a shorter sprint (8 weeks or less)the trade-off is less insight in the Discover Phase and a lower variety and volume of ideas developed and tested during the Design phase. However, you can still be successful, as many organizations have, with a sprint.

Resources for this Step

Project Planning Toolkit
p. 30 **Project Timeline**
p. 31 **Phase Workplan**
p. 32 **Project Charter**
p. 33 **Stakeholder Engagement Plan**



3 Phase Workplan

Next, break down each phase into core steps and outline the objectives, tasks, and key meetings for each.

4 Stakeholder Engagement Plan

Finally, outline your stakeholder engagement plan, identifying who needs to be involved in the project at each stage in order to ensure that your team has the right perspectives on the problem and is building the buy-in needed to actually create meaningful change. Use the RACI framework (Responsible, Accountable, Consulted, Informed) to categorize stakeholders into groups. Then, develop a plan for engaging each group throughout the project. You can find more on the RACI framework on page 33.

Like the other tools from the Frame phase, you should consider your project planning materials living documents. Update them as you go based on new information and changing circumstances.

Frame Phase Tools:

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BUNNY
お好み焼き
LABI

Framing the Problem

Question it Answers

What problem are you trying to solve?

How To Use It

Fill in the five boxes based on what you know now. Return to this tool throughout the project to update it based on new information.

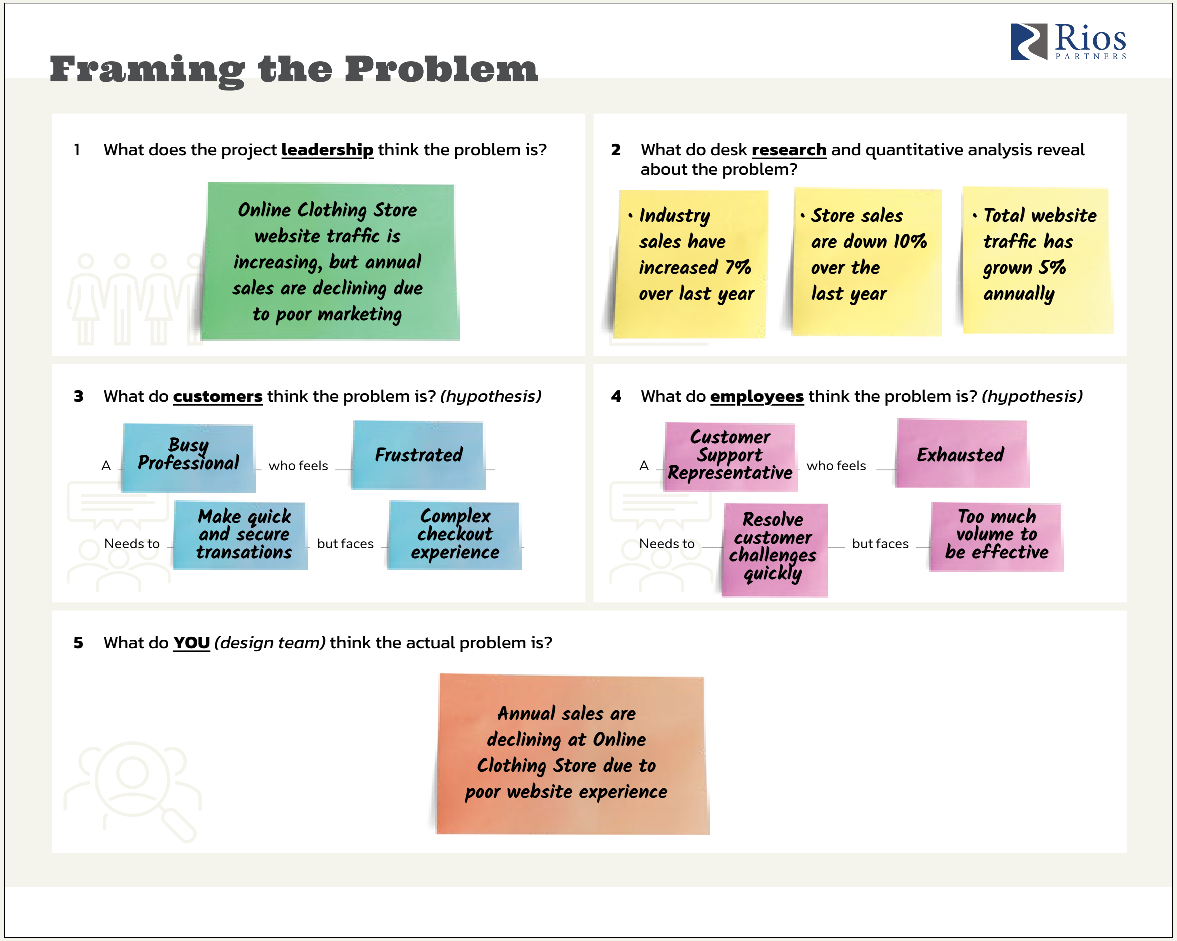
1 **What does leadership think the problem is? (e.g., product manager, design lead, CXO)**
What do they think is causing the problem? Why do they care about it?

2 **What does desk research tell you the problem is?**
In addition to quantitative data analysis, you can use a **Context Map** (page 23) or a **Business Model Canvas** (page 25) to map out the landscape surrounding the problem.

3 **What do customers think the problem is?**
For now, this will be a hypothesis based on what you already know about the customer. During the Discover phase, you will update this framing with evidence directly from customers.

4 **What do employees think the problem is?**
Repeat step 3 for frontline employees who interact with customers.

5 **What do you (the design team) think the problem actually is?**



Framing the Problem

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A ________________ who feels ________________
(Employee) *(Feeling)*

Needs to ________________ but faces ________________
(Goal) *(Barrier)*

5 What do **YOU** *(design team)* think the actual problem is?

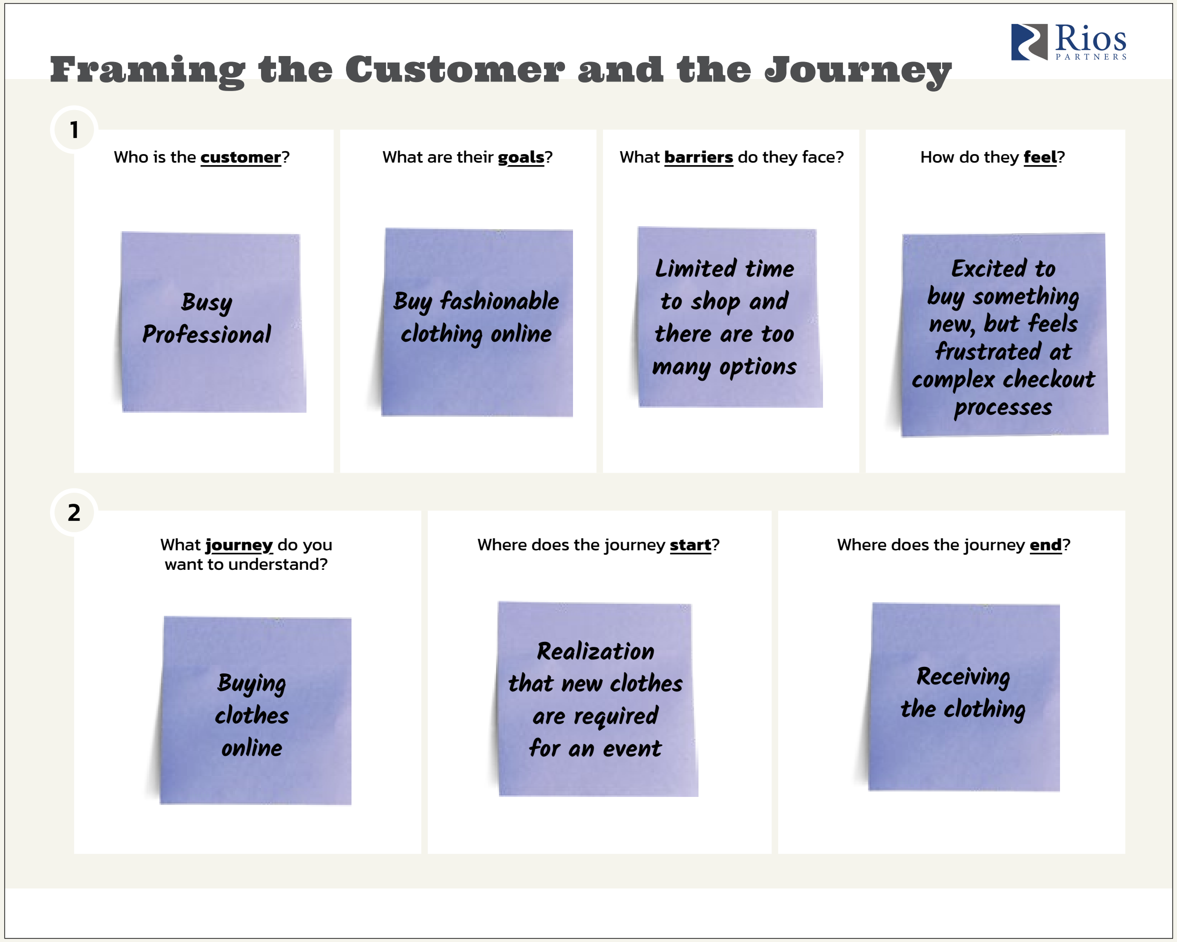
Framing the Customer and the Journey

Question it Answers
Who is the customer, and what journey are you trying to understand?

How To Use It
Brainstorm as a group using the prompts provided to get your ideas on the table. Then discuss and vote on the elements you want to focus on in your framing. Return to this document throughout the project as you refine your definition of the relevant customer and journey.

1. **Framing the customer:**
   Who is the relevant customer for the problem you are trying to solve? What are their key goals, barriers, and feelings?

2. **Framing the journey:**
   What is the end-to-end customer journey that is most relevant for understanding the problem you are trying to solve? Where does it start and end?



Framing the Customer and the Journey

Rios PARTNERS

1

Who is the **customer**?	What are their **goals**?	What **barriers** do they face?	How do they **feel**?

2

What **journey** do you want to understand?	Where does the journey **start**?	Where does the journey **end**?

Context Map

Question it Answers
What is the relevant context surrounding the problem?

How To Use It
This template forces you to think about the environment surrounding your organization. The context it provides is necessary to reframe the problem you're trying to solve based on relevant factors you might not have originally considered.

1. Start with a wide-ranging brainstorm of the context around your organization.

2. Highlight what you think are the most significant points for the problem at hand.

Context Map

Demographic Trends

Rules & Regulation

Economy & Environment

Competition (Direct & Indirect)

Your Organization

Technology Trends

Customer Needs

Uncertainties

Business Model Canvas

Question it Answers

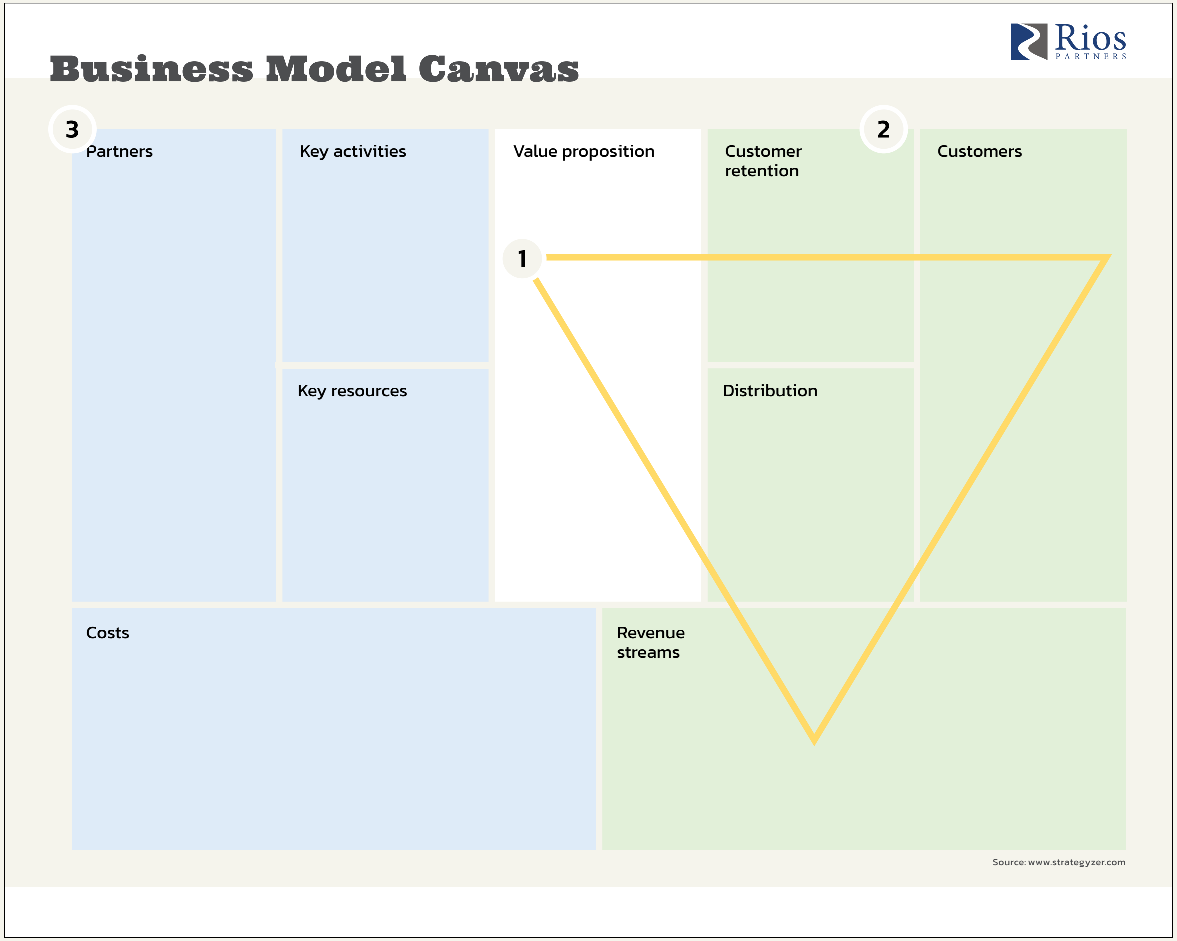
In what business environment does the problem exist?

How To Use It

The business model canvas captures the “make-or-break” components of your business model. It provides necessary context for your perspective on the problem and your organization’s customer interactions.

Use this tool in the Frame phase to understand the landscape around your problem. It is also useful in the Design phase as you identify gaps and map out how new solutions might change your business model.

1. Start by filling out the **“Golden Triangle”** of your value proposition (the value you provide to your customers), customers (primary and secondary), and revenue (how customers reward you for value delivered).
2. Next, fill in the rest of the **“front of the house”** sections (shaded green): customer retention (key relationship levers) and distribution (how customers receive your products and services).
3. Finally, fill in the **“back of the house”** sections (shaded blue): your partners, costs, and the key activities and resources needed to deliver on your value proposition.



Business Model Canvas

Partners

Key activities

Key resources

Value proposition

Customer retention

Distribution

Customers

Costs

Revenue streams

Source: www.strategyzer.com

Measurement Pyramid

Question it Answers
How do your project objectives tie to larger organizational purpose, and what customer shifts are needed to achieve them?

How To Use It

1 Start with the top row of the Pyramid and write down the purpose of your organization. This is the north star of your organization, indicating why the organization exists (e.g., a hospital sustaining healthy, thriving communities and building trusted relationships with those who need medical care) as opposed to what your organization does (e.g., providing comprehensive medical services).

2 In the second row, list the desired outcomes you hope to see if you are successful in solving the problem you've framed. Think of these as project KPIs that connect to the organization's purpose (e.g., improved clinical outcomes and increase in transparency with patients). These should be linked to strategic outcomes your organization has already outlined.

3 Then, consider what actions you would like customers to take in order to achieve the desired outcomes (i.e., outputs). For example, in order to achieve better clinical outcomes, you might want to increase consistency in patient check-ups. As you identify outputs, be sure to draw a line to the outcome(s) the output is connected to.

4 Once you identify the actions you would like customers to take, identify the experience they need to have in order to take those actions (i.e., moments that matter). For example, you may hypothesize that making it easier for patients to schedule an appointment will drive increased consistency in patient check-ups. Be sure to connect the moments that matter to the outputs they are related to. Remember, these are hypothesized moments that matter. You will solidify these once you get through the Discover phase.

5 Finally, there are the solutions that will improve customers experiences, drive action, lead to outcomes, and help your organization fulfill its mission. DO NOT FILL THIS IN YET. Remember, no solutions before Discovery. We will come back to connect solutions to moments that matter in the Implement phase.

Measurement Pyramid

Levels of measures

1 Organizational purpose

2 Outcomes driving organizational purpose

3 Outputs

4 Customer Journey

5 Solutions

Measurements

As measured by:
Why does your organization exist?

As measured by:
What are the key things you measure to determine whether your organization is fulfilling its purpose (think KPIs or objectives of OKRs)?

As measured by:
KPIs (e.g., the "key results" of OKRs) that lead to the desired outcomes and allow you to determine if your solutions + customer experience are delivering the desired results.

As measured by:
What is the customer experience?

Emotion: I felt **(emotion)** throughout **(action performed).**

Ease: It was easy to **(output action)** with **(whom or what).**

Effectiveness: I successfully did **(output action)** with **(whom or what).**

What are the key touchpoints that have a disproportionate impact on the customer's experience?

As measured by:
Are the products and services working as they should?

1 The quality of the solution

2 The performance or speed of the solution

3 The cost of the solution

Project Planning Toolkit

Question it Answers
How will the project be structured?
Who needs to be involved?

How To Use It
The Project Planning Toolkit is a suite of project management tools to help you structure the project successfully. Use them as-is or make them your own.

1. **Project Timeline:** Plot out each phase of the project on one timeline to align on a big-picture view of how long each phase will take. Set objectives, core tasks, and tools for each.

2. **Project Workplan:** Document your desired outcomes (e.g., changes that will occur) for the project. You should be able to explain how these outcomes will help drive your organizational goals.

3. **Project Charter:** Hypothesize the shifts in customer experience and behavior that will help you achieve your desired outcomes. You will revise this row in the Implement phase to reflect everything you have learned in the Discover and Design phases.

4. **Stakeholder Engagement Plan:** Brainstorm relevant stakeholders and sort them into groups. Use the RACI framework (Responsible, Accountable, Consulted, Informed) to categorize stakeholders by type of role. Then, develop a plan for engaging each group throughout the project.

Project Charter

1

Mission Statement

Project scope
(what is and is not included)

Team member #1 :

Role :

Responsibilities :

Team member #2 :

Role :

Responsibilities :

Team member #3 :

Role :

Responsibilities :

Team member #4 :

Role :

Responsibilities :

Team member #5 :

Role :

Responsibilities :

Team member #6 :

Role :

Responsibilities :

Project Timeline

2

	Frame	Discover	Design	Implement	Perform
Timeline	*Example: 2 weeks*	6 weeks	4 weeks	Dependent on scale of solutions	Ongoing
Objectives					
Tasks					
Tools					

Phase Workplan

3

	Discover Phase				
	Customer subgroup mapping	Interview preparation	Interviewing for empathy	Synthesis	Discover phase artifacts
Timeline					
Objectives					
Tasks					
Key Meetings					

Stakeholder Engagement Plan

4

Brainstorm all relevant stakeholders

Sort stakeholders into groups

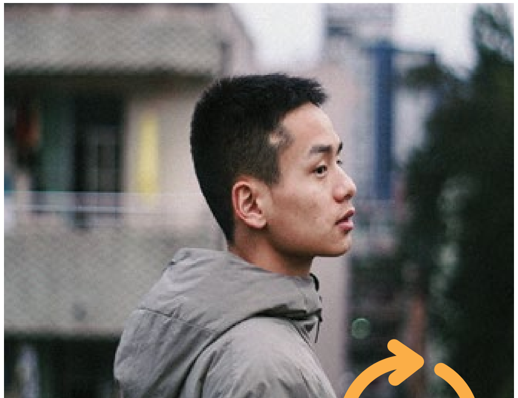
Assign stakeholders and stakeholder groups to the RACI framework quadrants

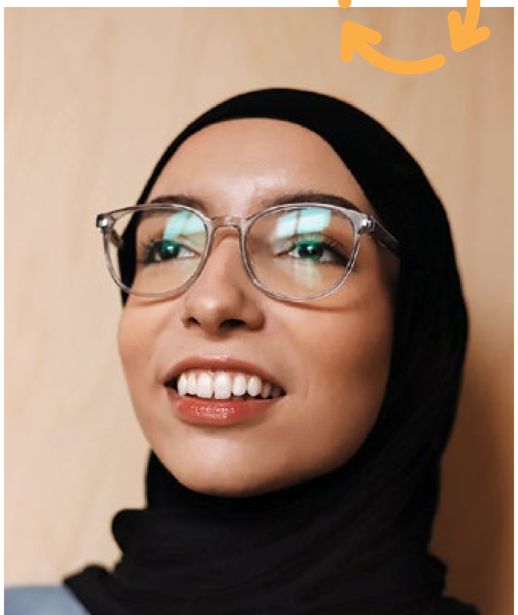
CONSULTED	ACCOUNTABLE
INFORMED	RESPONSIBLE

What is your plan for engaging each key stakeholder or group?

Stakeholder	

Notes and Drawings





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