



HCD for CX

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

Design Phase



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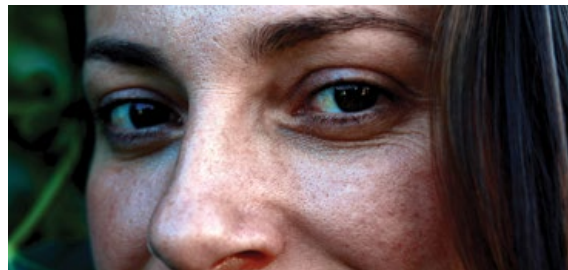
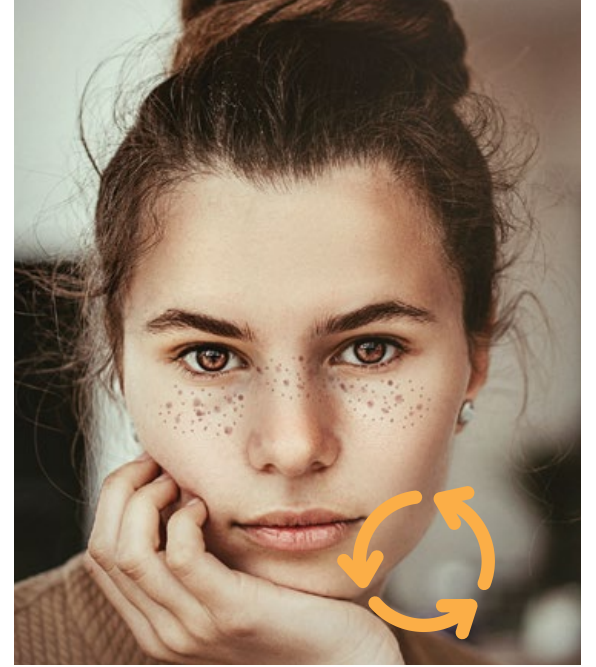
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Design Phase

Objectives

During the Design phase, you will invite customers and employees to ideate, design, and prototype solutions with you. The outcome of the Design phase is a set of high-fidelity prototypes that have been validated with customers and prioritized for implementation via business cases.

Approach

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

- **Empathy:** During the Design phase, you will go back to the customer to validate your understanding of their needs as well as ways to meet those needs using solution prototypes.
- **Iteration:** The Design process is grounded in a cyclical process of ideation, prototyping, testing, and refining.

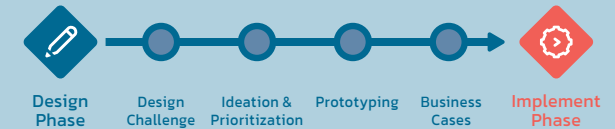
As you validate your ideas with customers, you will iterate towards higher-fidelity solutions in both detail and usability.

- **Flexibility:** The ideation and prototyping exercises included in this guide are intentionally open-ended because they are meant as a directional guide, not a prescriptive roadmap.

Feel free to take these activities and modify them to fit your needs. Just keep the ideas flowing!

Process

The Design phase includes the following core steps:

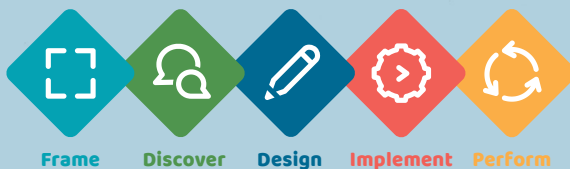


Phase-gate

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

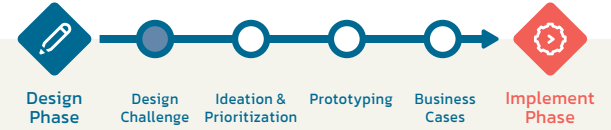
- 1 What solutions are most desirable to the customer?
- 2 How viable and feasible are the solutions?
- 3 Which solutions will we carry forward to piloting and implementation?

The five phases of the Rios Partners HCD process





Design Challenge



What

The Design Challenge is the first step in the Design process. As the bridge between the Discover and Design phases, this three-step process frames the "space" within which you will design.

Why

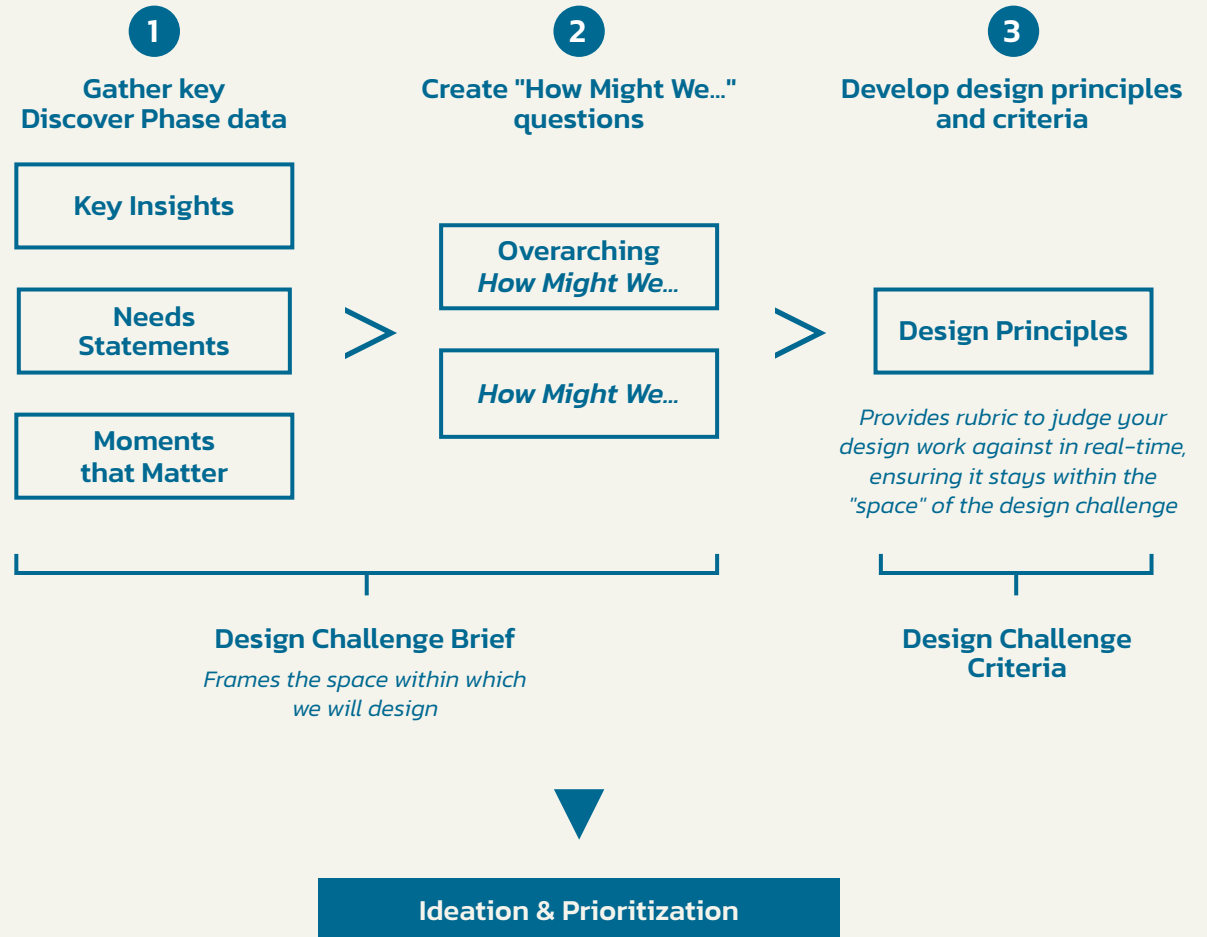
This process helps you define what you are going to design for in a way that directly ties to what you learned in the Discover phase.

How

Each of the steps will build on each other to ultimately produce a Design Challenge Brief that will guide your ideation. Moreover, you will develop Design Principles and Criteria to help you evaluate your ideas.

The next few pages will walk you through completing the steps illustrated on the right.

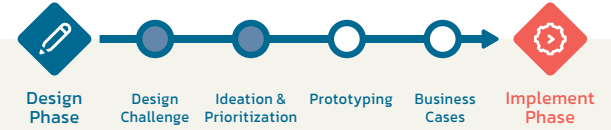
Steps



★ TURN ★
IDEAS INTO
REALITY



Design Challenge



Step 1 Discover Phase Learnings

Start developing your **Design Challenge Brief** by filling in your Insights, Needs Statements, and Moments that Matter from the Discover phase. The Mad Libs serve as a guide to help you synthesize your Discover learnings.

Design Challenge Brief

Insights	1	Theme Simple & secure online payment came up because Customers feel like they're providing too much information and suggests Streamlining checkout process					
	2	Theme _____ (Theme) came up because _____ (Reason) and suggests _____ (Opportunity)					
	3	Theme _____ (Theme) came up because _____ (Reason) and suggests _____ (Opportunity)					
Needs Statement	1	Busy Professional needs Simplified & secure online checkout because Fear of entering too much personal info	Moments that Matter	Moment #1	Moment #2	Moment #3	
	2	_____ (Customer) needs _____ because _____ (Reason)		Pre-fill customer and payment information from customer profile			
	3	_____ (Customer) needs _____ because _____ (Reason)					
How Might We...	2	Overarching	How Might We Improve our checkout process _____?				
		Subcomponents	A How Might We Automate customer data entry _____?				
			B How Might We _____?				
			C How Might We _____?				

Step 2

"How Might We..." Questions

Next, use your results from Section 1 to come up with "How Might We..." questions in Section 2 of the Design Challenge Brief. ("How Might We..." instructions on page 23)

"How Might We..." questions are prompts that, by answering them, generate new ideas relevant to the design challenge. They should be written in a way that is broad enough to give you room to explore yet narrow enough that you know where to start ideating.

Start by developing one overarching "How might we..." question that encapsulates the larger problem you are trying to solve. You can do this by turning your reframed problem statements into one question.

Brainstorm with your team to produce a few options based on the results from Section 1. Vote as a team for one overarching "How Might We..." question to use as your Design Challenge.

Now that you have the overarching "How Might We..." question, break down the problem into subcomponents. Develop several targeted "How Might We..." questions based on specific insights, needs, and Moments that Matter. Each of these will serve as mini-challenges or prompts to help you to ideate on specific elements of your solution.

Resources for this Step

| p. 23 'How Might We' template

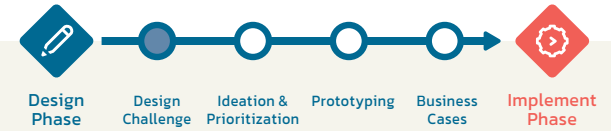
A good How Might We... should:

- 1 Give you a narrow enough frame so you know where to start your brainstorm,
- 2 Have enough breadth to give you room to explore many ideas, and
- 3 Not suggest a solution.

The "How Might We..." questions in the Design Challenge Brief will prepare you for success in the Design phase by homing in on your customers' needs, setting helpful boundaries that keep you focused on the most salient aspects of the problem, and aiding your ideation with creative prompts.

Problem Component	Problem Sub-components	"How Might We..." Questions
<i>The registration process is a consistent pain point for students. It is confusing to understand and takes too long to complete.</i>	<ul style="list-style-type: none"> • <i>The registration process is confusing to understand</i> • <i>The registration process takes too long to complete.</i> 	<ul style="list-style-type: none"> • <i>How might we... make the intake process easy for students to understand?</i> • <i>How might we... reduce the time needed to register while still meeting student needs?</i>
<i>A student needs to understand the criteria for each assignment because, without context, grading can feel arbitrary and unfair.</i>	<ul style="list-style-type: none"> • <i>A student needs to know the criteria for each assignment</i> • <i>Without context, grading can feel arbitrary and unfair</i> 	<ul style="list-style-type: none"> • <i>How might we ensure transparent criteria for every assignment?</i> • <i>How might we make grading feel fair instead of arbitrary?</i>

Design Challenge



Step 3 Design Principles

The next step of setting your design challenge is developing your Design Principles. Design Principles help you set boundaries around your ideation, prioritization and prototyping. Design principles convert needs statements and other Discover findings into criteria against which we can judge our potential solutions to ensure they meet the customer needs that surfaced in the Discover phase.

Use the **Design Principles** template to lay the groundwork for ideation and prototyping by brainstorming and prioritizing design principles. The MSCW framework (must, should, could, won't) will help you distinguish the "must-haves" from the "nice-to-haves."

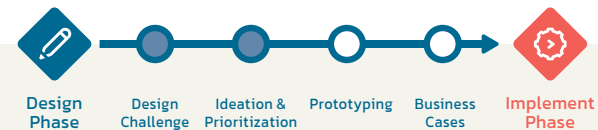
You can use Design Principles to guide design at different stages of the Design process and at varying levels of specificity. You might create one set of broad design principles that apply to the problem at large and another set for a particular moment on the journey.

How Might We... ...improve the drive-through experience?

A good solution...	Problem at large	Specific moment (waiting in line)	Specific Idea (option to order online while in line)
must	<i>Be accessible in multiple languages</i>	<i>Give the customer an estimate of how long the process will take</i>	<i>Be faster on average than the current system</i>
should	<i>Get the customer through the experience quickly</i>	<i>Make waiting in line more enjoyable</i>	<i>Be easy to navigate on a mobile device</i>
could	<i>Be gamified</i>	<i>Include activities to entertain kids</i>	<i>Provide a live ETA for your individual order</i>
will not	<i>Be the silver bullet for all customer problems</i>	<i>Make waiting in line more frustrating</i>	<i>Disadvantage customers who opt out of mobile ordering</i>



Ideation and Prioritization



What

Ideation activities are designed to generate and prioritize a high volume of ideas that address the problem and meet customer needs. These activities are designed to just focus on customer desirability and hold off on considering feasibility and viability.

Why

In the early stages of Design, it's critical to try to generate as many ideas as possible (quantity vs. quality) in order to surface as many unique ways as possible of addressing the customer's needs. Typical idea generation sessions are hobbled by an over reliance on "what do we have budget for" and "is this aligned to our strategy," which risks prematurely sorting out potentially innovative solutions that meet customer needs.

Resources for this Step

Ideation Exercises

- p. 27 **Creative Matrix**
- p. 29 **Idea Stream**
- p. 31 **Goodness–Feasibility Matrix**

Prioritization Exercises

- p. 37 **Connect the Dots**
- p. 39 **Feasibility-Impact Matrix**

How

1 Get into the right mindset

Be intentional about setting aside time for the team to be in "brainstorm mode." Establish brainstorm guidelines:

- Defer judgment
- Go for volume
- Encourage wild ideas
- Stick to the prompt
- Build on other's ideas ("yes, and" not "no because")
- Set time constraints

Include a range of stakeholders to increase the breadth of perspectives. Consider holding ideation sessions with customers, front-line employees, and anyone else you think has a perspective on the problem. Briefly recap any relevant context needed to put everyone in a customer-centric mindset such as needs statements, design principles, and insights from the Discover phase.

2 Generate as many ideas as possible

Use your "**How Might We...**" questions from the Design Challenge to begin your ideation session. The most important part of ideation is to create volume and a variety of solutions before prioritizing. Follow **Ideation Exercises** and have participants write their ideas on sticky notes that they can post on a wall or virtual whiteboard so that everyone in the group can see them.

3 Categorize ideas

After you've generated a large volume of ideas, take some time to organize them. Look for common themes or types of solutions and group them accordingly.

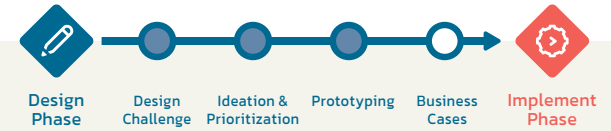
At this point you may combine two or more ideas into one. Use the Design Principles & Criteria to help evaluate which ideas might be better combined into one great idea

4 Prioritize ideas

The simplest method of prioritization is to give each participant in the ideation session the same number of votes and identify the ideas that rise to the top. The **Connect the Dots** exercise (template on page 38) asks each participant to vote in three separate rounds for the ideas that they think are most desirable to the customer, most feasible to implement, and the biggest game changers for the organization.



Prototyping



What

Prototyping is the process of getting ideas out of your head and into the real world so that customers, employees, and other stakeholders can engage with them and give you feedback. A prototype can be anything that takes a physical form: a storyboard, a role-playing activity, a sketch, a model, or an interface, just to name a few. A good prototype goes beyond the descriptive to create an experience for the customer to test.

Why

The goal of prototyping is to test the assumptions in the solution and to de-risk implementation by testing low-cost, low-fidelity versions of an idea with the people who will be customers and the implementation team *before* you invest heavily in development. Prototyping allows you to iterate rapidly with each prototype, increasing the fidelity of the prototype along with your knowledge of what meets / doesn't meet your customer's needs.

Resources for this Step

- p. 33 **Storyboard Template**
- p. 35 **To-Be Journey Map**
- p. 41 **Testing Tracker**

How

Prototyping follows a “Build-Test-Refine” cycle with increasing levels of fidelity.

1 Build

Choose one of your prioritized ideas. Take a pen and paper and draw how you might implement your idea in the real world (a “napkin sketch”), or use the **Storyboarding Canvas** and **To-Be Journey Map** to visually illustrate how a customer would experience your idea.

Push yourself to make something a person can interact with as quickly as possible. Examples of prototypes are:

- A short podcast episode
- A scaled model of a redesigned space the user can “walk-through”
- Acting out a new service script with potential customers
- An interactive mock-up of a smart-phone app or website users can click through
- A simulation of a digital experience, paper prototype
- A controlled, small-scale version of an event

2 Test

Before investing heavily in an idea, test a low-fidelity version with customers and employees to get actionable feedback.

During a testing session,

- Allow the customers to interact with it freely.
- Do not overexplain it. Let the customer experience it for themselves.
- Ask the customer to talk you through their experience with the prototype.
- Observe how they use or misuse the prototype, and do not correct them.
- As you follow up with questions, listen for what is emotionally resonant about the prototype and how it would or would not improve the customer's journey.

You can use the **Testing Tracker** to identify the assumptions you are testing along with the results of each test.

The goal of prototyping sessions is not to get a “thumbs up” (or “thumbs down”) on your idea. It is to develop a deeper understanding of the customers' needs and to leave with ideas for how to make your solution better (or for an entirely new solution).

3 Refine

After validating that a prototype meets a customer's need, develop higher-fidelity versions to hone in on the specific features of the prototype. The more detail and usability you add to your prototype, the more customer feedback will help you identify what's working well and what needs further adjustment.

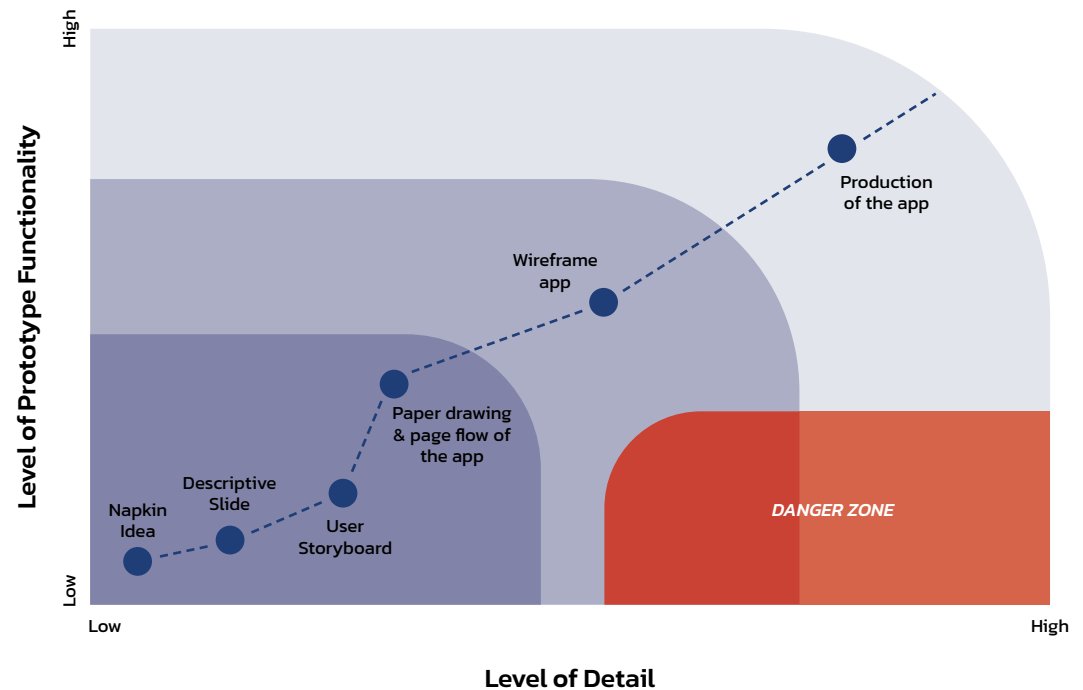
Continue to apply the "Build-Test-Refine" cycle on a wide variety of ideas, including ideas that are exciting for customers but are not feasible. You may discover an innovative solution that can become feasible later while still meeting the customer's core need.

Testing Tracker	
Test Name: Assumption tested	Results:
Hypothesis: We believe that _____ will result in _____ measured by _____	Conclusion: <input type="checkbox"/> Valid <input type="checkbox"/> Not Valid <input type="checkbox"/> Inconclusive <input type="checkbox"/> Continue with additional tests <input type="checkbox"/> Stop; no additional tests needed
Test Setup: Explain Test	Next Step: How will you adjust and what are your next steps?

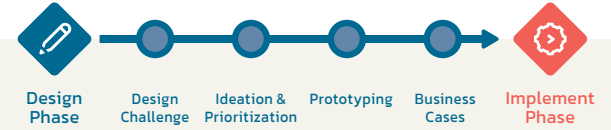
Fidelity Graph

The fidelity of a prototype should be thought of as a combination of two dimensions: the functionality of the prototype and the level of detail included. As you develop your prototypes based on feedback, they should be increasing in fidelity along both dimensions.

Beware the temptation to develop the level of detail to a high level without increasing functionality (such as putting together a highly produced pitch deck). It is more important to make a prototype that customers can experience rather than a description, even if it lacks detail.



Business Cases



What

A business case helps you determine whether to move a solution forward into implementation by assessing the costs and benefits.

Why

While the focus of the HCD process thus far has been on the desirability to the customer and meeting customer needs, successful solutions will also need to be feasible (the organization can implement them) and viable (the organization should implement them). The business case allows you to balance all three considerations when prioritizing which solutions to invest in.

How

1 Use the **Business Case** template to document expected costs and benefits.

In the Opportunity section, document how this solution meets customer needs as well as how you expect the solution to drive the organization's strategic goals. What is the one to two key assumptions you have made and what is the estimated impact of your solution.

On the Investment side, consider what people, processes, and new tools and technology you will need to implement the idea.

Finally, draft an initial set of metrics you will use to measure the success of your solution. See the sidebar for more information on updating the **Measurement Pyramid** and linking it to metrics. You will return to these metrics in greater detail when creating your measurement plan in the Implement phase (see page 29).

2 Prioritize your prototypes with the **Feasibility-Impact Matrix**.

Rank prototypes based on your current estimation of how feasible they will be to execute and the benefits you expect they will provide. Use the data you compiled in each business case to quantify feasibility and impact as much as possible, even if it means using estimates, projections, or proxy data.

Prioritize high impact, high feasibility ideas as potential "quick wins". Plan on a longer timeline for developing ideas that are less feasible to implement but have "game-changing" potential.

There are a few additional tools you can use to supplement business cases as you tell the story of how your solutions will transform the customer's experience.

Business Case		Rios	
Concept:			
Opportunity		Investment	
Target Customer:		People needed	
Design opportunity addressed:	How will this solution drive the organization's strategic goals?	<ul style="list-style-type: none"> Staff and training needs Who owns this Key stakeholders (internal & external) 	
How will this solution meet customer needs?	Moments that matter impacted:	Processes needed	
What are your two biggest assumptions?		<ul style="list-style-type: none"> New processes Changes to existing processes 	
Estimated population size served:		Processes needed	
<small>Total potential customers x % to adoption rate x size customers using product</small>		<ul style="list-style-type: none"> Software/hardware Web development Communications Other 	
Estimated impact on investments (ROI):		Time needed	
<small>Revenue cost savings, reduced costs, number of people served and the impact on them</small>		<ul style="list-style-type: none"> To pilot To launch 	
		Cost to Pilot	\$ (x) Months
		Cost to Roll Out	\$ Year 1
		Annual Operating Cost	\$ Yearly
		Metrics	
		Implementation Metrics	
		Output Metric 1	
		Output Metric 2	
		Outcome Metrics 1	
		Outcome Metrics 2	



As you document the desired future state, keep in mind the 3 Es of customer experience. How do your solutions make the customer's journey more effective, easier, and more emotionally resonant?

Update the Measurement Pyramid

Return to your Measurement Pyramid. You have filled in organizational goals and desired outcomes and hypothesized shifts in customer experience and behavior in the Frame phase. Now, add in the Moments that Matter to the customer journey row and your proposed solutions to the solutions row.

Connect each moment that matters to a solution in the row above and to the outcome that you expect will lead to achieving your desired outcomes. You should now be able to draw a direct connection between the solutions you plan to implement and your organizational goals.



Design Phase Tools:

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p. 21 **Design Challenge Brief**

Question It Answers

What problems, insights, and questions should our designs address?

What it Does

Frames the bounds within which you will design, and creates a focused view of what you learned in Discover and how you will solve it through the Design phase

p. 23 **How Might We Questions**

Question It Answers

What questions should you ask to generate ideas that will meet identified customer needs?

What it Does

Serves as a prompt for ideation by posing simple questions that narrow in on customer needs but are broad enough to allow for a wide range of possible solutions

p. 25 **Design Principles**

Question It Answers

What elements should a solution have to ensure it aligns with what you learned about the customer in the Discover phase?

What it Does

Establishes and prioritizes the principles that will guide your ideas and designs to ensure you stay focused on validated customer needs

p. 27 **Creative Matrix**

Question It Answers

What are all the potential desirable solutions to the problem?

What it Does

Uses constraints to help focus your ideating to spark new and creative ideas

p. 29 **Idea Stream**

Question It Answers

Text Here

What it Does

Text Here


p. 31 **Goodness-Feasibility Matrix**

Question It Answers

Text Here

What it Does

Text Here



**"ALL IDEAS
GROW OUT OF
OTHER IDEAS."**

— ANISH KAPOOR

Design Phase Tools:

Table of Contents

p. 33 **Storyboard Template**

Question It Answers

How does the solution work, and what will it feel like?

What it Does

Demonstrates how a customer would experience your idea

p. 35 **To-Be Journey Map**

Question It Answers

How does a set of solutions transform the end-to-end future customer journey?

What it Does

Demonstrates how a portfolio of solutions combine to change what the customer is doing, thinking, and feeling along their journey

p. 37 **Connect the Dots**

Question It Answers

What are the best ideas to prototype?

What it Does

Uses a series of voting to help determine what are your best concepts to move forward with

p. 39 **Feasibility-Impact Matrix**

Question It Answers

Which ideas should you prototype first?

What it Does

Sorts ideas and solutions into actionable categories based on feasibility of implementation and expected impact

p. 41 **Testing Tracker**

Question It Answers

What did you learn from testing your prototype?

What it Does

Documents the purpose of each test as well as the results and next steps

p. 43 **Business Case Template**

Question It Answers

What is the investment required and potential return on investment of this solution?

What it Does

Explains why a proposed solution is desirable to a customer (meets a need), is feasible to implement (your organization can do it), and aligns with the organization's larger strategy and objectives (your organization should do it)

p. 45

Measurement Pyramid

Question It Answers

How do your proposed solutions connect to your organizational goals?

What it Does

Links your proposed solutions to moments along the customer journey that lead to customer actions that will achieve your desired outcomes and drive your organizational goals

Design Challenge Brief

Question it Answers

How do you set your team up for success in the Design phase?


How To Use It

Kick off the Design phase by developing a Design Challenge Brief, which consists of the following tools:

- **Needs statements** (see Discover phase)
- **Insights** (see Discover phase)
- **Design Criteria** (see Design phase)
- **"How Might We..." questions** (see Design phase)

Together, they will prepare you for success in the Design phase by homing in on your customers' needs, setting helpful boundaries that keep you focused on the most salient aspects of the problem, and aiding your ideation with creative prompts.

- 1 Build out each of these tools following the instructions that accompany their own templates.
- 2 Then compile your work into the Design Brief Challenge for easy reference as you go through the Design phase.



Design Challenge Brief

Insights	1	Theme <u>Simple & secure online payment</u> came up because <u>Customers feel like they're providing too much information</u> and suggests <u>Streamlining checkout process</u>					
	2	Theme _____ (Theme) came up because _____ (Reason) and suggests _____ (Opportunity)					
	3	Theme _____ (Theme) came up because _____ (Reason) and suggests _____ (Opportunity)					
Needs Statement	1	<u>Busy Professional</u> needs <u>Simplified & secure online checkout</u> because <u>Fear of entering too much personal info</u>	Moments that Matter	Moment #1	Moment #2	Moment #3	
	2	_____ (Customer) needs _____ because _____ (Reason)		<u>Pre-fill customer and payment information from customer profile</u>			
	3	_____ (Customer) needs _____ because _____ (Reason)					
How Might We...	Overarching	How Might We _____ <u>Improve our checkout process</u> _____ ?					
	Subcomponents	A	How Might We _____ <u>Automate customer data entry</u> _____ ?				
		B	How Might We _____ _____ ?				
		C	How Might We _____ _____ ?				

Design Challenge Brief

1

Insights

1 Theme _____ came up because _____ and suggests _____
(Theme) (Reason) (Opportunity)

2 Theme _____ came up because _____ and suggests _____
(Theme) (Reason) (Opportunity)

3 Theme _____ came up because _____ and suggests _____
(Theme) (Reason) (Opportunity)

Needs Statement

1 _____ needs _____ because _____
(Customer) (Describe what the customer needs) (Reason)

2 _____ needs _____ because _____
(Customer) (Describe what the customer needs) (Reason)

3 _____ needs _____ because _____
(Customer) (Describe what the customer needs) (Reason)

Moments that Matter

	Moment #1	Moment #2	Moment #3

2

How Might We...

Overarching How Might We _____ ?

A How Might We _____ ?

B How Might We _____ ?

C How Might We _____ ?

Subcomponents

How Might We...

Question it Answers

What questions should you ask to generate ideas that will meet identified customer needs?

How To Use It

- 1 Choose one design opportunity you are excited to ideate on. Break it down into multiple components.
- 2 Come up with at least one “How Might We...” question for each component. The strongest “How Might We...” questions are simple, clearly demonstrate the problem you are trying to solve, and are broad enough to allow for a wide range of possible solutions.
- 3 Use your “How Might We...” questions with your team, as well as with customers and stakeholders, to spark ideas during ideation.

A good *How Might We...* should:

- Give you a narrow enough frame so you know where to start your Brainstorm
- Enough breadth to give you room to explore many ideas
- Should not suggest a solution

Steps to develop *How Might We...* questions:

- 1 Out of all the insight that emerged from your discover phase, prioritize them and pick a few you what to focus on.
- 2 Take each design problem and break it down into subcomponents.
- 3 Brainstorm multiple *How Might We...* questions targeting each subcomponent of the problem.
- 4 You might create several questions for each statement.

How Might We...



Design Principles

Question it Answers

What elements should a solution have to ensure it aligns with what you learned about the customer in the Discover phase?

How To Use It

1 Recap Discover phase

Review the key outputs from the Discover phase, including needs statements, themes, Moments that Matter, the customer journey, and key insights that emerge from these findings.

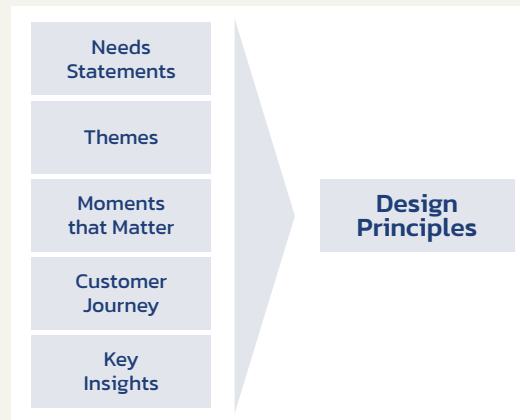
2 Draft design statements

Based on what you've learned about the customer's needs, consider what criteria your solutions must meet to be successful. Brainstorm design principles individually and as a group, and then come together and select roughly 5 to 10 principles to adopt. These can continue to evolve throughout the Design phase as you test prototypes with your customers and employees.

3 Draft design statements

Place the design principles you have developed into the MSCW framework (must, should, could, won't).

This will help you prioritize the principles and be able to assess your ideas and solutions against.



Design Principles

Write out the *How Might We...* design challenge

Must Have

Should Have

Could Have

Will Not Have

Creative Matrix

Question it Answers

What are all the potential desirable solutions to the problem?

How To Use It

The Creative Matrix tool uses constraints to help focus your ideating to spark new and creative ideas.

- 1** Title column headers with different categories of user you want to solve for.
- 2** Title rows with different categories of enablers for the solution.
- 3** Ask participants to place stickies with ideas in each box within in the grid. Ideas should solve for the user in that column using the enabler in that row.
- 4** Ideate for 15-20 minutes.
- 5** Challenge all participants to come up with at least one idea per box. Celebrate the participants or teams with the most ideas.
- 6** Vote to identify and prioritize the group's top ideas.

Creative Matrix

	User 1	User 2	User 3	User 4	User 5
Criteria 1					
Criteria 2					
Criteria 3					
Criteria 4					
Criteria 5					

Idea Stream

Question it Answers

What are all the potential desirable solutions to the problem?

How To Use It

- 1** Break the design team into several breakout groups with no more than 5 people per group. Each group will be assigned a different "How Might We..." statement to ideate on .
- 2** Individually brainstorm for five to ten minutes to come up with ideas for possible interventions on their "How Might We" statement.
- 3** In the breakout group, give each participant 1 minute to present their ideas to the group while combining duplicative ideas together.
- 4** Once everyone has presented their ideas, each breakout group should narrow their list to 5 potential interventions. This can be done by voting or by group consensus.
- 5** Each group passes their list of ideas and their "How Might We" prompts clockwise to the next group.
- 6** Take the new list and read each new prompt out loud and repeat the activity until every group has seen each list.

Idea Stream

How Might We...

A

B

C

Group 1

Group 2

Group 3

Group 4

Group 5

Goodness-Feasibility Matrix

Question it Answers

What are all the potential desirable solutions to the problem?

How To Use It

- 1 Pick an individual "How Might We..." statement**
Select the statement you want everyone to ideate on.
- 2 Ideation**
Set a time limit and an ambitious goal for ideation (e.g. 35 ideas in 5 min). Have each member of the design team create ideas for each of the four quadrants, noting a range of good, feasible ideas and bad, impossible ideas.
- 3** When time is up, go around in a circle and have each person introduce one idea and place it on the matrix. Continue until everyone has introduced several ideas. While it is not critical to have the same number for each quadrant, the point of the activity is to think through and share ideas that would fit in each of the categories.
- 4** Refine ideas list. If a team member sees an idea that they would like to iterate upon and turn into an actionable idea, have them write it down and discuss at the end of the exercise.

Goodness-Feasibility Matrix

How Might We...



Storyboard Template

Question it Answers

How does the solution work, and what will it feel like?

How To Use It

A Storyboard helps you quickly explain your idea to others in a visual and more detailed way.

- 1 Identify an idea to develop further.
- 2 Use the template or build one on a large sheet of paper. Feel free to make more blank rectangles as needed to tell your story.
- 3 Draft the main story line: beginning, middle, and end.
- 4 Remember to detail out the main customers and their setting(s).
- 5 Draw the key frames for the future scenario.
- 6 Below each box, describe the customers' and employees' basic actions, thoughts, and feelings. Add additional details that are not evident from the drawing, but are important to tell the story.

Here are some additional tips:

- Get inspired by comic books.
- Be creative in how you communicate the story. Imagine the customer's perspective. Use icons, clip art, and photos as needed – there's no need to draw everything by hand!

Storyboard Template

Step 1

Step 2

Step 3

What are the customers/service/employees...

What are the customers/service/employees...

What are the customers/service/employees...

Doing:
Feeling:
Thinking:

Doing:
Feeling:
Thinking:

Doing:
Feeling:
Thinking:

Step 4

Step 5

Step 6

What are the customers/service/employees...

What are the customers/service/employees...

What are the customers/service/employees...

Doing:
Feeling:
Thinking:

Doing:
Feeling:
Thinking:

Doing:
Feeling:
Thinking:

To-Be Journey Map

Question it Answers

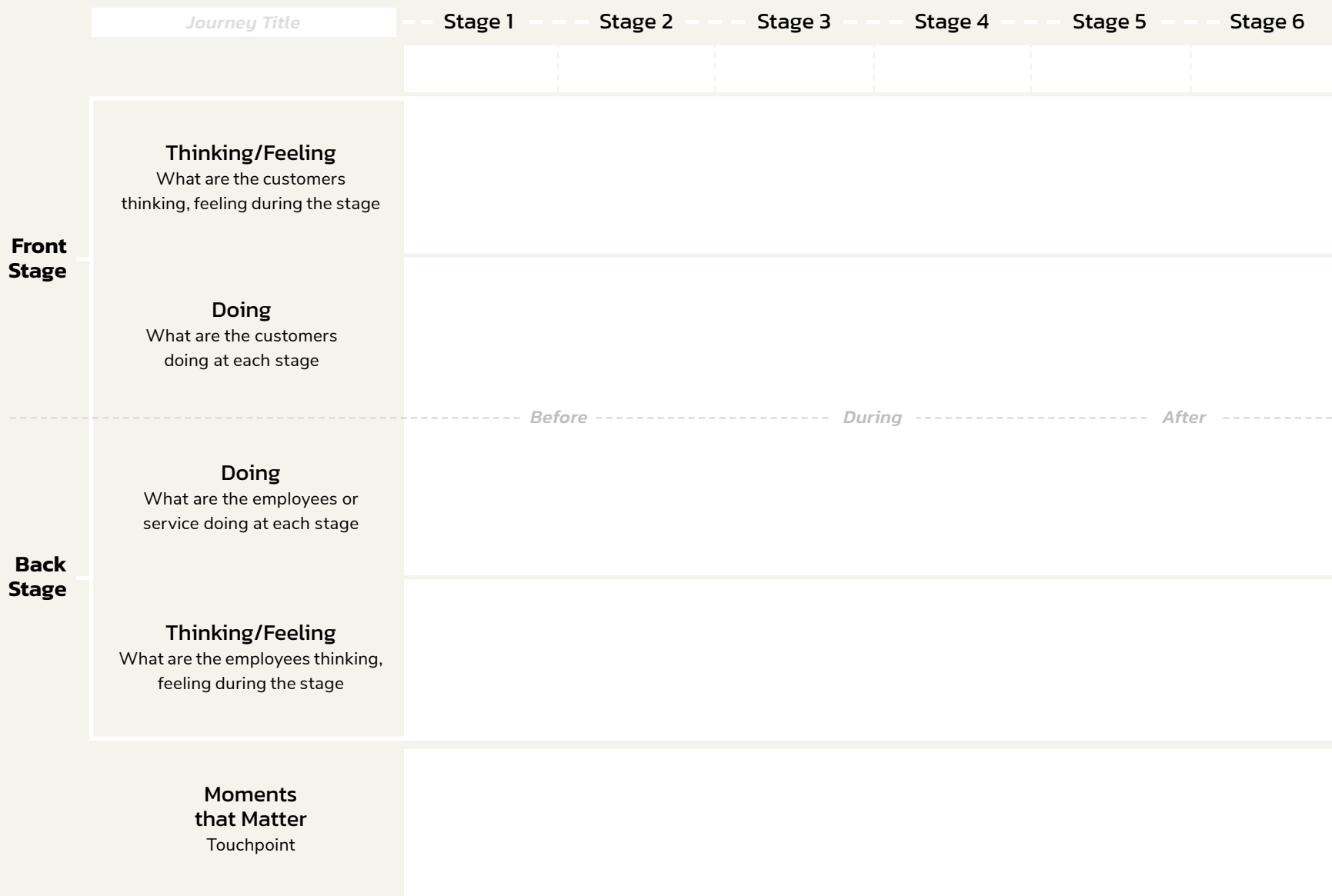
How do a set of solutions transform the end-to-end future customer journey?

How To Use It

A To-Be Journey Map helps you brainstorm multiple future journeys that address your customers' (or employees') pain points and solve for their needs. It shows what customers will be doing, thinking, and feeling at each future stage.

- 1** Start by filling in the main journey stages from the As-Is Journey Map. Make any updates to the journey based on new findings.
- 2** Build out the To-Be Journey Map, focusing on what customers will be doing, thinking, and feeling as they move along the journey. Make sure to address pain points and map out how customers will experience Moments that Matter. Remember to also highlight bright spots along the journey.
- 3** Be sure to also include the back stage experience for employees as they interact with customers.
- 4** Validate your To-Be Journey Map by sharing it with customers and employees. Gauge whether they believe the journey as outlined will lead to the experienced described. Make adjustments based on their feedback.

To-Be Journey Map



Use arrows to show connections between front stage and backstage emotions, actions, etc.

Connect the Dots

Question it Answers

What are the best ideas to prototype?

How To Use It

After leading an ideation session, the Connect the Dots tool helps you identify the most promising ideas.

- 1** Sort all ideas into groups by the problem they are attempting to solve. Combine similar ideas so that there are not duplicates.
- 2** Give each participant six dot stickers: two each of green, blue, and red (or use colored markers). The most important thing is to limit the number of votes each participant gets.
- 3** Have participants review each idea on the board and then cast votes in the following categories:
 - A** Green: most feasible in the immediate future
 - B** Blue: most likely to delight the customer (unconcerned with practicality)
 - C** Red: biggest “game changer” idea
- 4** Identify the most popular ideas in each category by number of votes. Discuss them as a group and further refine them as necessary.

Connect the Dots

Most feasible in the near future

Idea 1

Idea 2

Idea 3

Most likely to delight the customer

Idea 1

Idea 2

Idea 3

Biggest potential game-changer

Idea 1

Idea 2

Idea 3

Feasibility-Impact Matrix

Question it Answers

Which ideas should you prototype first?

How To Use It

A Feasibility-Impact matrix helps you prioritize your ideas based on their feasibility to implement and their impact on your customers and organization.

- 1 Evaluate each idea using the following considerations. Assess each independently of the other.

Feasibility Considerations:

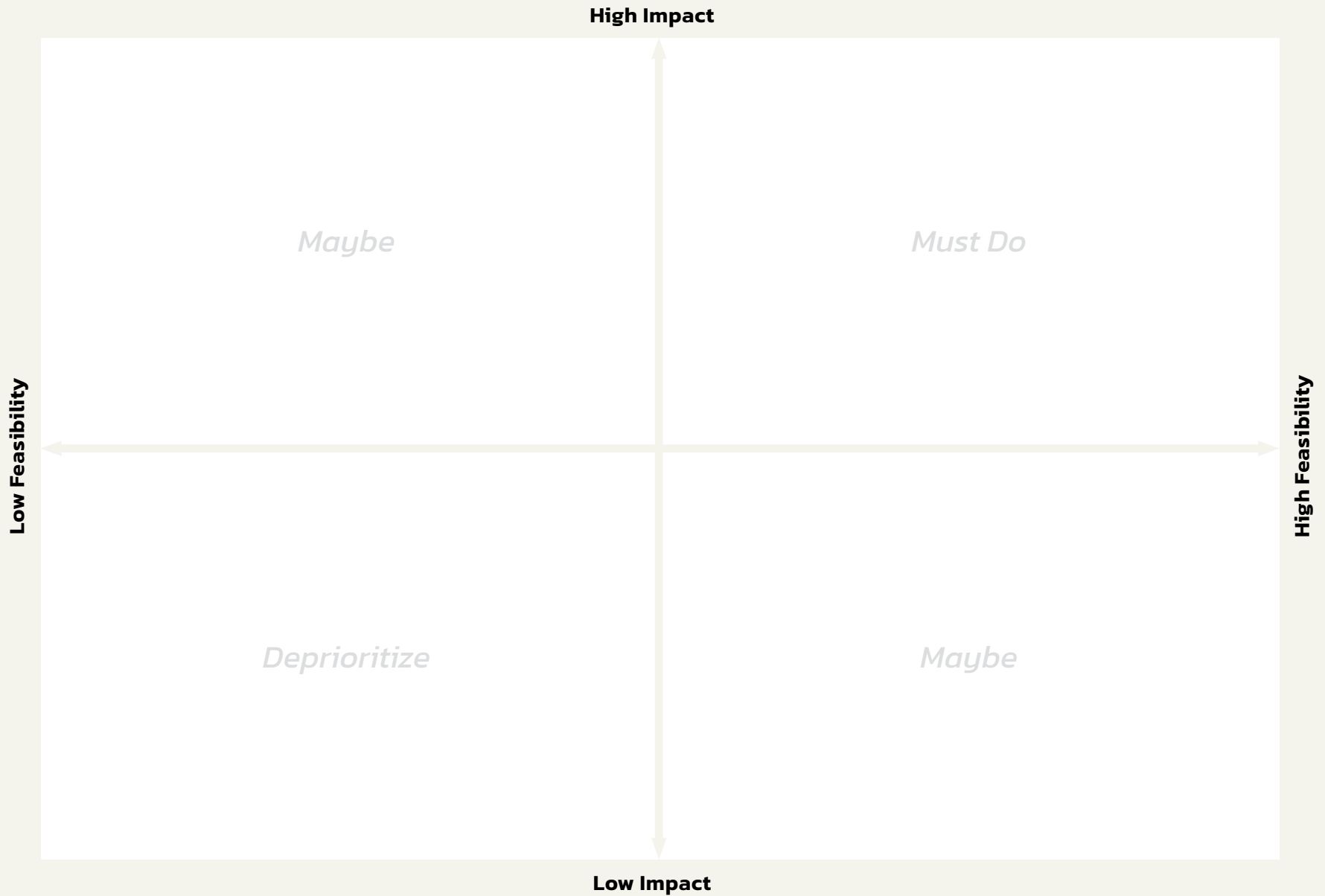
- Cost and availability of funding
- Staff time
- Scope and complexity
- Internal and external buy-in

Impact Considerations:

- Impact on customer experience
- Impact on strategic KPIs

- 2 Plot all ideas on the matrix.
- 3 Prioritize more feasible and impactful ideas (upper right quadrant). Deprioritize less feasible and impactful ideas (lower left quadrant).

Feasibility-Impact Matrix



Testing Tracker

Question it Answers

What did you learn from testing your prototype?

How To Use It

The goal of testing is to learn more about whether and how your solutions meets your customers' needs. The Testing tracker documents your assumptions and hypotheses going in to a test and your results coming out of it.

- 1** List your assumptions about your prototype and customer.
- 2** Fill in your hypothesis, which is your theory for what you expect to happen. Include a way to measure the results so that you can validate or disprove your hypothesis.
- 3** Describe your test setup. This is important documentation so that you can refer to the test later.
- 4** After the test, record your results. Include direct customer feedback, as well as your observations of the customer as they interacted with your prototype.
- 5** Using your measurement criteria, determine whether your hypothesis was valid and whether you will need additional tests.
- 6** Record changes you plan to make for future test and outline the next steps in the process.

Testing Tracker

Test Name:

Assumption tested

What are you testing for and with whom

Results

What did you observe?

Hypothesis

We believe that _____

will result in _____

measured by _____

Conclusion

- Valid
- Not Valid
- Inconclusive
 - Continue with additional tests
 - Stop; no additional tests needed

Test Setup

Explain Test

Next Step

How will you adjust and what are your next steps?

Business Case

Question it Answers

What is the investment required and potential return on investment of this solution?

How To Use It

Once you determine that a proposed solution meets your customers' needs (desirable), a business case evaluates whether your organization has the capability to implement it (feasible) and whether it aligns with your strategic priorities (viable). Comparing business cases allows you to evaluate the costs and impacts of each proposed solution before making investment decisions.

- 1** In the opportunity section, identify your customer and the ways in which your solution will improve their experience and meet their needs.
- 2** List the two or three key assumptions you still have for your solution.
- 3** Estimate the monetary and non-monetary impacts your proposed solution will have on your organization.
- 4** In the investment section, conduct an analysis of the resources and budget required to launch and sustain your solution.
- 5** In the metrics section, determine how you will measure the impact of your solution.

Business Case

Concept:

Opportunity

Target Customer:

Design opportunity addressed:

How will this solution drive the organization's strategic goals?

How will this solution meet customer needs?

Moments that matter impacted:

What are your two biggest assumptions?

Estimated population size served:

Total potential customers x yy% adoption rate = zzz customers using product

Estimated impact on investments (ROI):

Revenue, cost savings, mitigated costs, number of people served and the impact on them

Investment

People needed

- Staff and training needs
- Who owns this
- Key stakeholders (internal & external)

Processes needed

- New processes
- Changes to existing processes

Processes needed

- Software/hardware
- Web development
- Communications
- Other

Time needed

- To pilot
- To launch

Cost to Pilot	\$	(x) Months
Cost to Roll Out	\$	Year 1
Annual Operating Cost	\$	Yearly

Metrics

Implementation Metrics

Output Metric 1

Output Metric 2

Outcome Metrics 1

Outcome Metrics 2

Measurement Pyramid

Question it Answers

How do your solutions (pilots) connect to your organization's purpose?

How To Use It

For each of your pilots, the Measurement Pyramid links your solution through an improved customer journey to your organization's purpose.

- 1** Recall what you started with in the Frame phase. Your organization's purpose should be the same. Remember, everything must connect to why the organization exists (e.g., a hospital sustaining healthy, thriving communities and building trusted relationships with those who need medical care) not simply what your organization does (e.g., providing comprehensive medical services).
- 2** In the second row, refine the desired outcomes based on your refined understanding of the problem through Discover and Design. Think of these as project KPIs that connect to the organization's purpose (e.g., improved clinical outcomes and increase in transparency with patients). Note, these should be linked to strategic outcomes your organization has already outlined.
- 3** Then, refine the list of 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 moments that matter to customers that enable them to take those actions. For example, you may have confirmed your hypothesis from the Frame phase that making it easier for patients to schedule an appointment will drive increased consistency in patient check-ups. The moment that matters would be "scheduling an appointment." Be sure to connect the moment that matter to the related output(s)
- 5** Finally, fill in the solutions you will pilot and connect them to the moments that matter to customers. For each solution, it is critical to identify activity metrics that will let you know if the solutions is performing well (e.g., 1. the quality of the solution 2. the performance or speed of the solution 3. the cost of the solution). For scheduling appointments, the solution may be an online scheduling portal as opposed to everyone calling to make appointments. For this, you could measure the time it takes to schedule an appointment in the portal as well as the number of calls received with questions about how to use the portal.

Some of your desired actions may not align with moments that matter. This is an important consideration. Be sure to ground your decisions on what to measure in empathy, considering the optimal customer experience.

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).

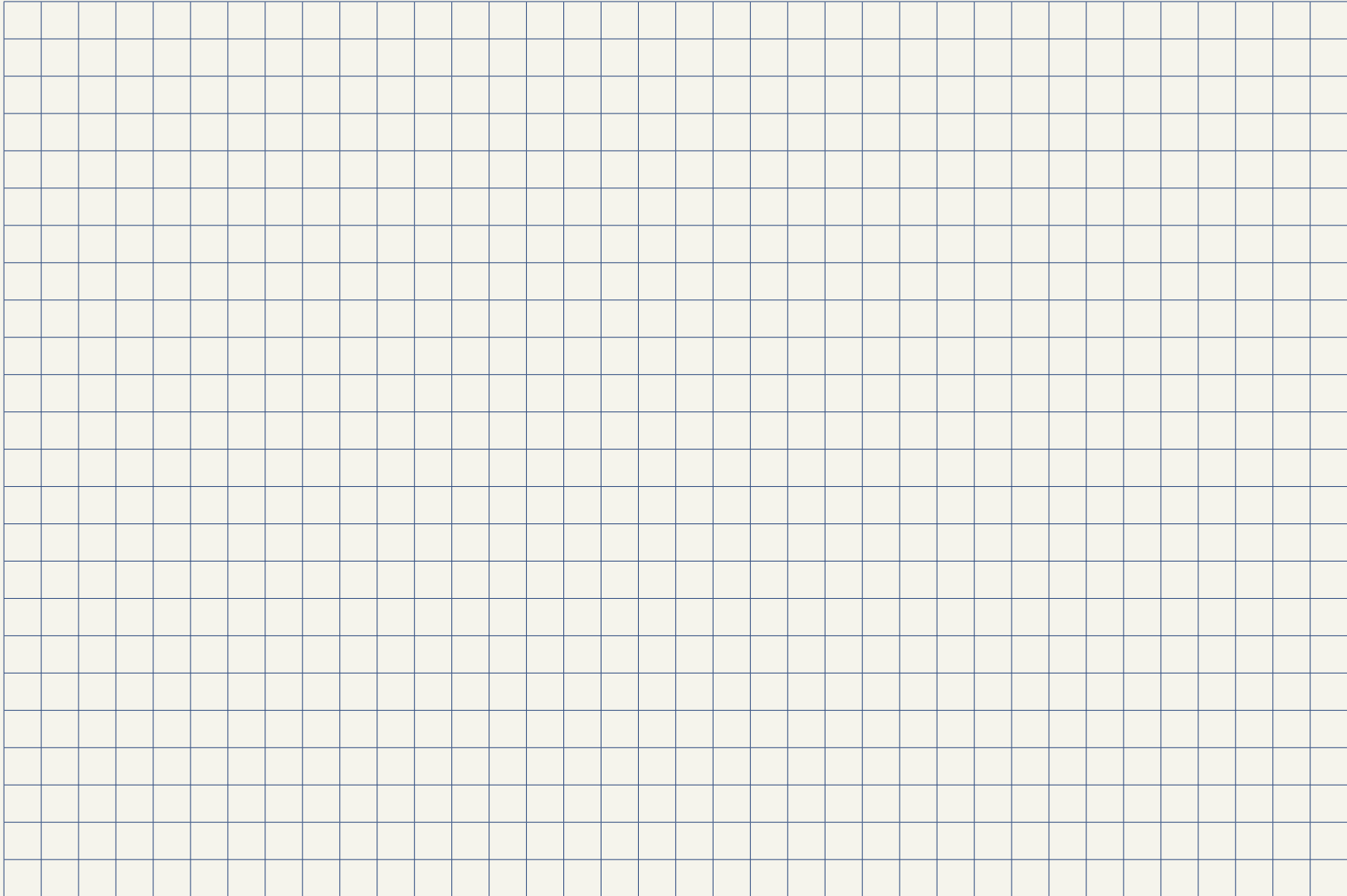
Ease: It was easy to (output action) with (whom or what).

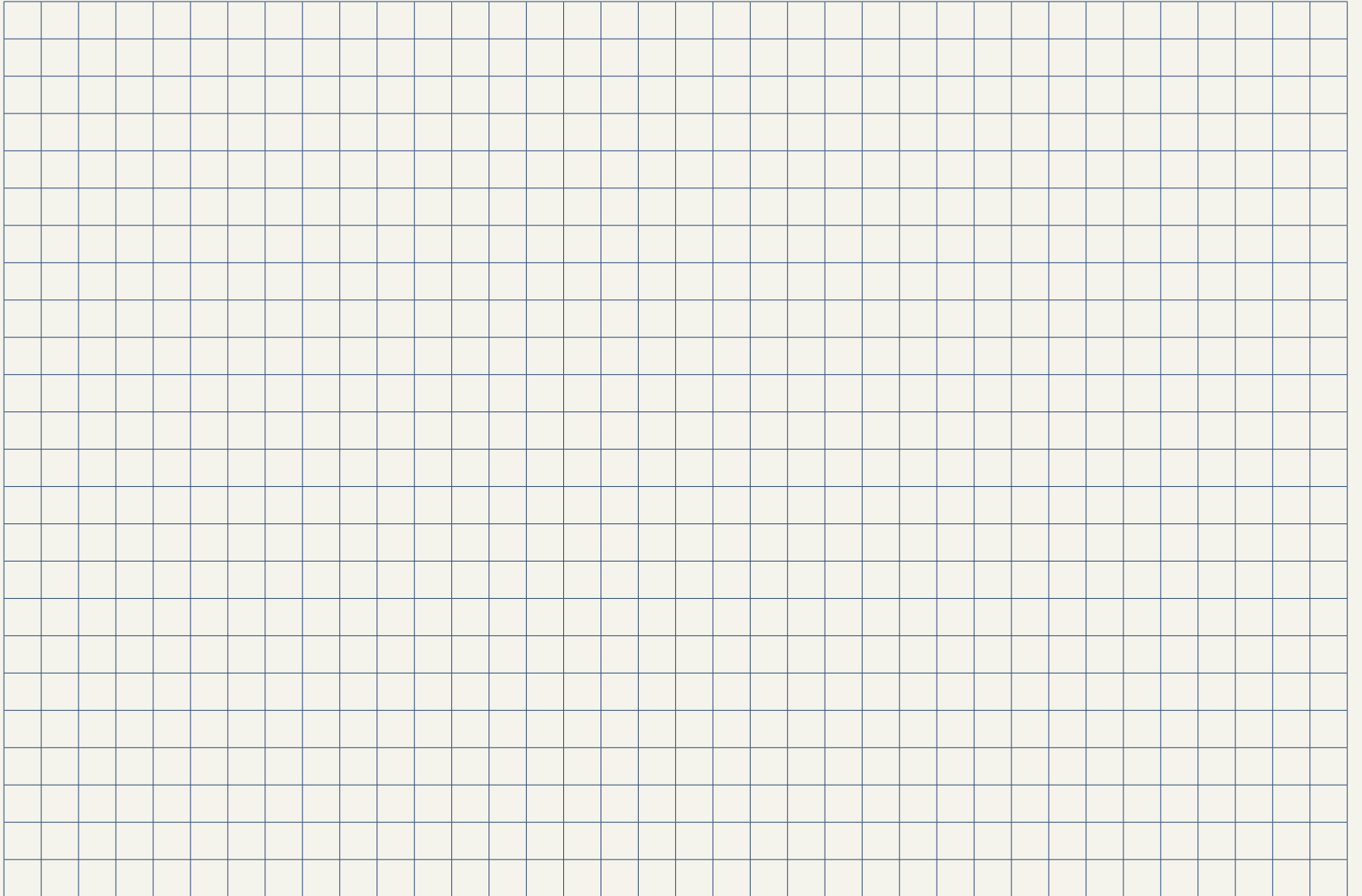
Effectiveness: I successfully did (output action) with (whom or what).

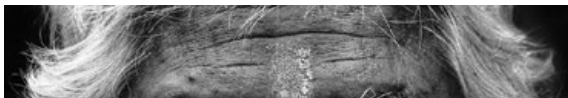
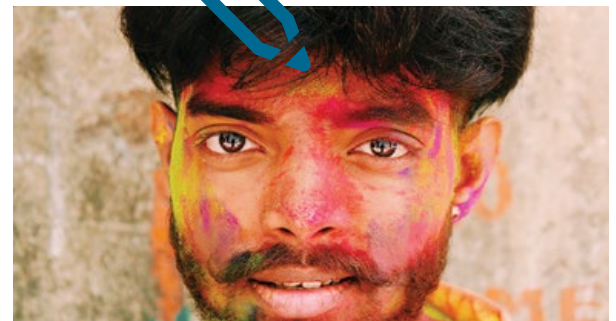
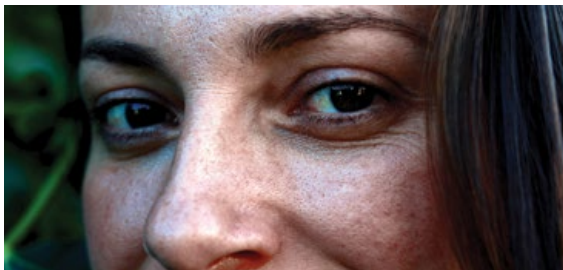
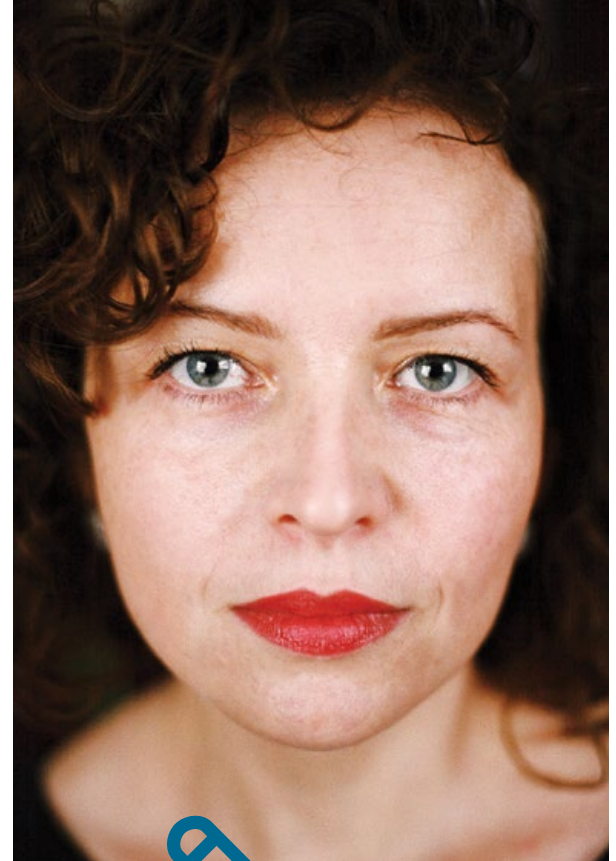
What are the key touchpoints that have a disproportionate impact on the customer's experience?

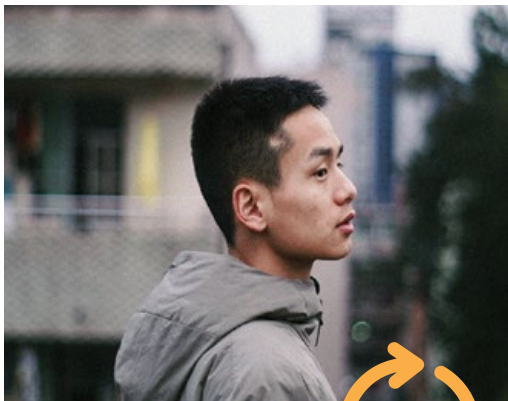
As measured by:
Are the products and services working as they should?
1 The quality of the solution
2 The performance or speed of the solution
3 The cost of the solution

Notes and Drawings









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