



HCD for CX

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

4

Implement Phase



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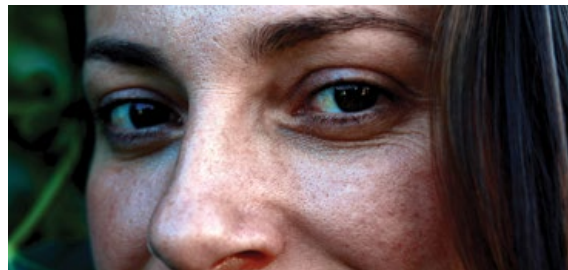
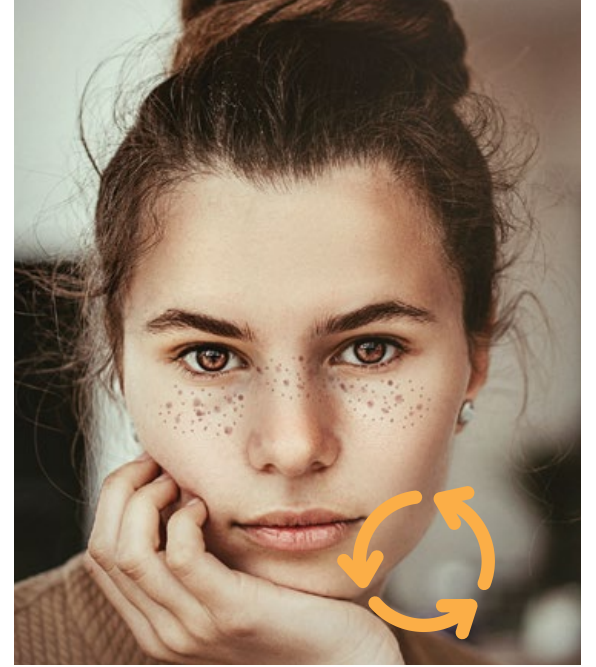
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Implement Phase

Objectives

In the Implement phase, you will turn promising prototypes into Minimum Valuable Products and/or services to pilot in order to achieve “proof of concept”. You will then further develop, test, and scale your solution until, ultimately, you are ready to roll it out in full.

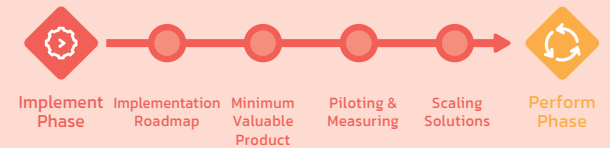
Approach

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

- **Empathy:** As you pilot, continue engaging customers to find out exactly how and why they are (or aren't) using your solution. Your measurement plan should include a method for tracking the “three Es” of customer experience: Is it effective? Is it easy? What is the emotional experience?
- **Iteration:** Before rolling out the full “car” (full-feature product), your first goal in the Implement phase is to get a working “skateboard” into the hands of your customers. A skateboard adds immediate value, is cheap to build, and allows you to incorporate feedback as you build out more features over time.
- **Flexibility:** Not every solution you pilot in the real world will work the way you hoped. A flexible mindset will help your team embrace inevitable failures as opportunities to learn and adjust.

Process

The Implement phase includes the following core steps:

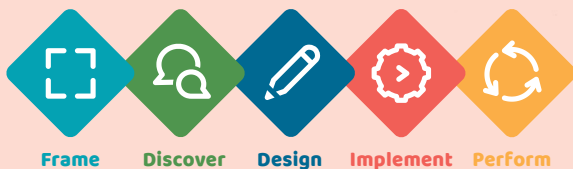


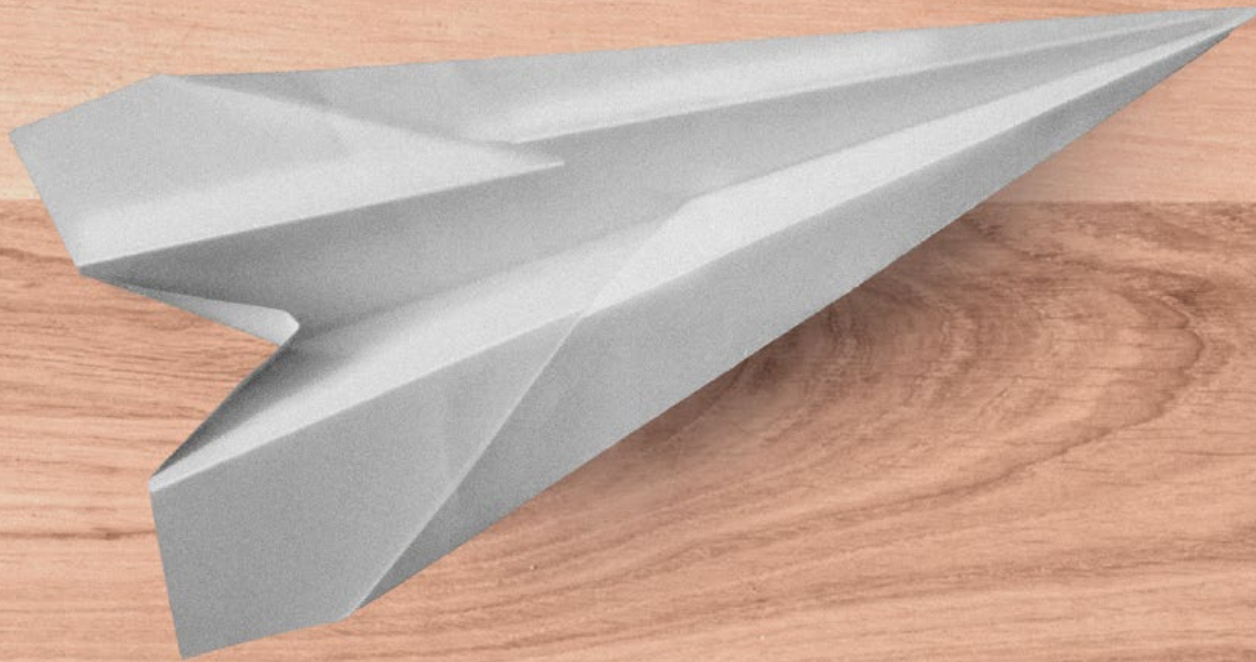
Phase-gate

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

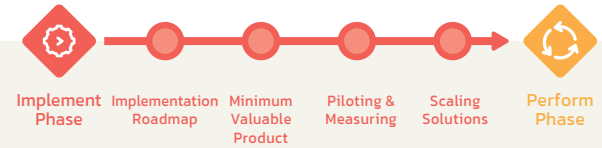
- 1 What is the long-term implementation plan for the proposed solutions?
- 2 Which solutions reached proof of concept or MVP? How do you know?
- 3 How will your team measure whether implemented solutions are successful?

The five phases of the Rios Partners HCD process





Implementation Roadmap



What

An Implementation Roadmap is a high-level planning tool that allows you to see how all your solutions fit together into a single implementation plan. It sorts solutions into buckets based on the expected implementation timeline and cost.

Why

At the end of the Design phase, you created business cases to show the potential return on investment of each individual solution that addresses the problem at hand. An implementation roadmap brings those business cases data points together to synthesize projected costs, benefits, and implementation timelines across a suite of products and services, giving you a holistic picture of your solution-set and how it will roll out over time.

Resources for this Step

| p. 19 **Implementation Roadmap**

How

Follow these steps to input your solutions into the **Implementation Roadmap** planning tool:

1 Determine the order of implementation and expected timeline

Take the **Feasibility-Impact Matrix** you filled out in the Design phase (page 39) and use it to fill in your solutions into three buckets: Quick wins (high feasibility, high impact), Near term (high feasibility, lower impact), and Long term (lower feasibility, high impact).

		Estimated Year 1 Investment					Impact		Timeline	
Solution	Pilot Opportunity	Cost to pilot (\$k)	Year 1 startup cost (\$k)	Annual run-rate (\$k)	Total Year 1 Cost (\$k)	Impacted KPIs	Other	Pilot	Roll-out	
Quick Wins < 1 year	Pilot Opportunity #1							Q1 2021	2021	
	Pilot Opportunity #2							Q3 2021	2022	
	Pilot Opportunity #3							Q4 2021	2022	
Near Term 1-3 years	Pilot Opportunity #1							Q1 2022	2022	
	Pilot Opportunity #2							Q4 2022	2023	
	Pilot Opportunity #3							2023	2023	
Long Term 3+ years	Pilot Opportunity #1							2023	2023	
	Pilot Opportunity #2							2023	2023	
	Pilot Opportunity #3							2023	2023	

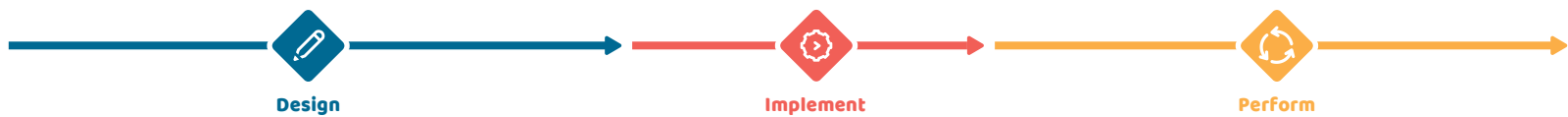
Start with the Timeline column to create an initial pilot kick-off schedule for each solution, and when you expect to be ready to fully rollout. Your estimates may change significantly as you learn and iterate, so you should be regularly updating the timeline as you proceed through the Implement phase.

2 Identify pilot opportunities

Use the Roadmap as a way to start tracking pilot opportunities. Consider who your internal “change champions” are and who might be willing to try something new and untested. Think about where you can build on work that has already been done to test out your concept. As you build out full plans for the MVP of each solution in the next step, return to the Roadmap and update the “Pilot Opportunity” column of the Roadmap as your plans solidify.

3 Add cost and impact estimates

Go back to your business cases and review your cost and impact estimates. Add these values to the Roadmap, adjusting based on any new information. Under cost, estimate both the cost to pilot, the cost for the first year of full rollout, and the annual run-rate for subsequent years. Like the timelines and pilot opportunities, these cost estimates should be updated as your plans evolve. Under impact, note any key metrics you expect the solution to drive for your organization, as well as the impact you expect the solution to have on the customer experience.



At the outset of the Design phase, you are testing in a controlled environment (i.e., where you set the constraints for how the customer experiences your prototype) to see if you have an accurate understanding of customer needs, and testing your solution's biggest assumptions.

As you continue to prototype your solution, you come to a point in time where you have learned all you can from users in a controlled environment and need to test in an uncontrolled environment, as a pilot product or service. This is where you launch solutions into the world (an uncontrolled environment) at a small(er) scale (i.e., limited geography, demographic, etc). This is done so that your team can see how customers and environmental forces affect/interact with your solution.

After you have proven your pilot to be successful (by your success measurements), you will start to scale your product or service. You will continue to measure the performance (outputs and outcomes) of the solution and continually refine based on your insights.

Build the Minimum Valuable Product



What

The Minimum Valuable Product (MVP) (also called the Minimum Viable Product) is the version of your solution that delivers on its **value proposition** (meaning it has sufficient functionality to deliver the core benefits) with the least possible investment of resources. We often refer to the Minimum Valuable Product as the “skateboard” because it delivers on the value proposition of a car (getting from point A to point B) but requires a low level of resources and time to build.

Why

The traditional “waterfall” method of design is to build towards a solution piece by piece without creating intermediate, usable versions along the way. If your design is based on a faulty assumption, you will have wasted time and resources building something that customers won’t actually use.

HCD uses the “agile” approach of iterative implementation because it substantially de-risks implementation by catching flawed assumptions early, before you have made significant investments. The “skateboard to car” approach also allows you to provide value to the customer from very early on, building out and delivering more advanced features over time as you move on to the bicycle, moped, and car.

Resources for this Step

| p. 21 **Designing an MVP**

How

Use the **Designing an MVP** tool to help turn your prototype into a concept that you can build for pilot testing.

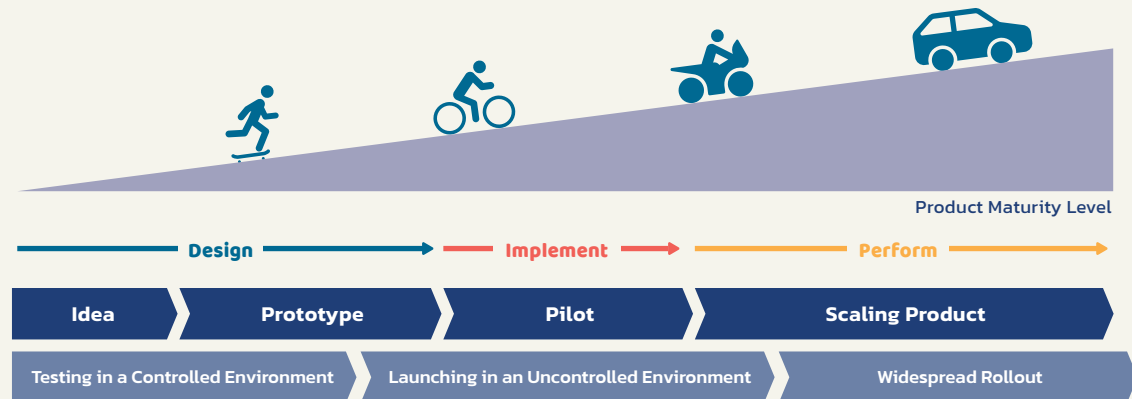
- 1 Identify the value proposition of your solution**
Start by clearly identifying the value proposition for the solution. What is the value it provides to customers? What is the value it provides to your employees or the larger organization?
- 2 Build out your MVP concept**
Next, brainstorm as a team how you might create a “skateboard” version of your idea that is quick to build and deploy, but still meets the value proposition. One helpful brainstorming prompt is to ask the team “What could we launch tomorrow?” and then build out the MVP concept from there. Create a storyboard to illustrate how your customers and employees will experience it.

Next, create a storyboard to illustrate how your MVP will work and, most importantly, how customers and employees will experience it. Identify what customers will be doing, thinking, and feeling as they use your MVP.

3 Build the skateboard

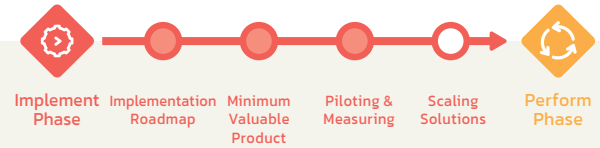
Once you have finalized the concept, build out an MVP. Success breeds success, so start with something you can develop rapidly. A “quick win” will demonstrate value to customers while also validating the process internally.

Once you have designed and built a skateboard, you will prepare to pilot it in the real world by building out a measurement plan (page 9) and a detailed pilot plan (page 11).





Create the Measurement Plan



What

A measurement plan details the qualitative and quantitative data you will use to assess the impact of your implemented solutions. You will start with a measurement plan for the pilot (as you test the MVP) and refine the measurement plan as you adjust and scale the solution.

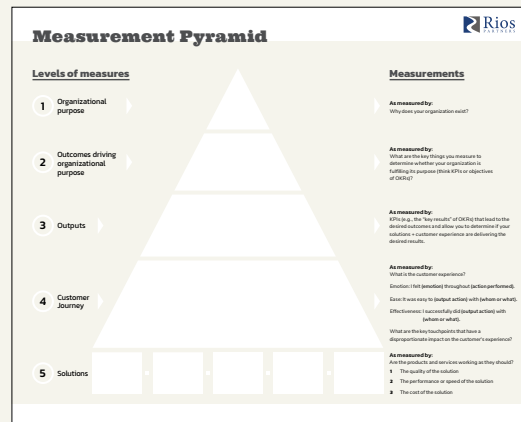
Why

Measurement allows you to validate whether your solutions are having their intended effect in the real world, and how to improve the solution. Using a comprehensive measurement framework tying your solutions all the way up to top-level organizational goals ensures you are measuring not just for outputs (immediate result) but desired outcomes (meaningful change).

How

Once your pilot is in the field, how will you know if it delivers the desired outcomes?

- 1 Return to your **Measurement Pyramid**.



Review, update, and expand the bottom three rows and the links you have drawn between solutions and your organizational goals based on everything you have learned throughout the HCD process, as well as any recent changes to your MVP designs.

- You should be able to tell a clear story about how each solution drives customer actions and behavior change at critical moments along the customer journey to create the desired customer outcomes that will help you accomplish your organizational goals.

- 2 Build a **Metrics Tree** for each solution you are going to pilot. This tool helps you establish the metrics you will use to track progress at every level of the Pyramid.

First, consider how you'll measure inputs (e.g., number of products built) and outputs (e.g., number of products used) of your pilot.

- Next, determine how you will measure qualitative customer experience of your pilot using effectiveness, ease, and emotion statements (e.g., On a 1 to 5 scale from strongly disagree to strongly agree: "It was easy to get where I needed to go using this product").
- Finally, document how the outputs and the improved journey will drive quantitative outcome metrics (e.g., number of subscription renewals; percentage of customers who lack safe transportation). Keep laddering up your metrics until you arrive at your organizational goals.

Resources for this Step

p. 29 **Measurement Pyramid**

p. 31 **Metrics Tree**

After conducting and measuring your pilot, you should be able to answer the following questions:

- Was the solution deployed as intended? (input metrics)
- Are customers using it? (output metrics)
- What did customers and employees say? (CX and EX surveys)
- Is it having the desired outcome? (outcome metrics)
- Is it as feasible as your team thought? (Was your cost-benefit analysis accurate?)
- Is it as impactful as your team thought? (Do the outcomes drive our larger strategy?)

Measuring the Three Es of Customer Experience

Recall the “Three Es” of customer experience. Was the experience **effective**? Was it **easy**? Was it **emotionally resonant**? In the Discover phase, you considered the customer experience through the lens of the Three Es and considered which was most relevant to each Moment that Matters along the journey.

Now that you are ready to pilot an MVP solution in the field, you’ll need a way to measure the customer experience created by your solution.

You can measure the Three Es using a customer experience survey that asks customers to rate effectiveness, ease, or emotion statement on a scale of 1 to 5. Always include an open text field inviting customers to tell you more about their experience. The 1 to 5 scale is a great way to track a trend over time, but the text field will give you the best insights into why the experience was positive or negative.

The experience survey method can also be used to measure the employee’s experience (EX) of deploying the solution to customers.

It is easy to follow up with when I have a question:

1

2

3

4

5

Strongly disagree

Strongly agree

Tell us more:

Pilot the MVP



What

The difference between a prototype and a pilot is the control you have over the testing environment. Prototype tests are controlled, and participants are usually aware that they are testing something that is still under development. A pilot takes a fully usable skateboard and puts it in front of a real-world audience to see how it performs.

Why

Piloting your MVP outside of a controlled environment gives you insight into how it will perform in the real world without requiring the investment needed to build and roll out the full product or service. For example, some software companies pilot apps only on their websites or only in a certain geographic region to work out bugs before a national or app store launch.

How

Prepare for your pilot by identifying your critical uncertainties and planning your first 90-day sprint. Then execute the pilot, using the measurement plan to assess its impact.

1 Identify critical uncertainties

Before you pilot, document everything critical you don't know and that you hope to learn from seeing customers use your solution in the real world. You can use an **Assumption Matrix** or create a new iteration of the running list of hypotheses and assumptions you've been tracking throughout the process. Make sure you have a solid theory for how your pilot of an MVP will help you resolve your critical uncertainties.

2 Create the 90-day plan

We suggest setting a goal of 90 days for your first implementation "sprint" in order to quickly deliver value and gather feedback for the next iteration.

Start by thinking about where you want to be in 90 days. What milestones will you have achieved? Which stakeholders will you involve in your project, and how? What processes, technologies, or personnel will you engage to deploy your solution? What types of feedback will you have gathered from customers, and how will you use it?

Once you have answered these questions, then work backwards to week one, filling in key activities and benchmarks along the way. We have provided a **Pilot Planning template**, but feel free to adapt it or create your own.

3 Run the pilot

There is no substitute for a real-world test. Kick off your pilot and follow your plan, but don't be afraid to adjust or iterate mid-stream based on the feedback you're receiving.

Resources for this Step

- p. 23 **Assumption Matrix**
- p. 25 **Pilot Planning template**



Scaling Solutions



What

Once you have achieved proof of concept, the final step of the Implement phase is to scale your solution. You will iterate and improve on your MVP by adjusting existing components and adding new ones. You will also expand the reach of your solution once you have validated a favorable return on investment.

Why

Using an iterative approach to scaling will help you continue de-risking as you go, turning your skateboard into a bicycle first before building your full car.

How

After wrapping up your pilot, take time to analyze the results before reaching a decision about whether and how to scale your solution.

1 Document learnings

The **Validation 'Mad Lib'** is one simple tool you can use to document your learnings over the course of a pilot and to track how you have proved or disproved your assumptions. Use a variety of feedback tools, including quantitative metrics, customer experience surveys, focus groups, observational research, and one-on-one interviews to understand how your solution is working and whether it is meeting your objectives.

2 Decision point

Your team needs to assess your scaling solution by setting decision points, i.e., go, no-go, or pivot. Part of the agile process of HCD is the ability to cut your losses on something that isn't going to have a high return on investment before you invest heavily.

As you make this decision, answer the questions you first posed when creating your Measurement Plan (page 9):

- Did your team deploy the solution as intended? (input metrics)
- Are customers using it? (output metrics)
- What did customers and employees say? (CX and EX surveys)
- Is it having the desired outcome? (outcome metrics)
- Is it as feasible as your team thought? (Was your CBA accurate?)

Resources for this Step

| p. 27 **Validation 'Mad Lib'**

3 Create the Rollout strategy

As you decide to move forward with your piloted solution, you need to develop a plan for iterating and scaling the product or service to both build out its functionality and to reach a larger audience.

You can keep the audience small (e.g. one market) as you add and test new features, or you can take your MVP to a broader audience to see if it does equally well in different environments. Over time, you will be adding both depth (functionality) and breadth (audience) until your product is fully rolled out at scale.

As you iterate and scale, return to your Measurement Pyramid and metrics trees often. Update them with new measurements metrics and continue to refine your story for how your solutions are driving top-level strategic goals through an improved customer experience.



Implement Phase Tools:

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Feasibility-Impact Matrix

Question It Answers

How should you prioritize your solutions for implementation?

What it Does

Helps you establish an implementation timeline based on the feasibility of implementation and the expected impact

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Implementation Roadmap

Question It Answers

How should you organize the prototype implementation process?

What it Does

Creates a timeline, estimates cost and impact, and plans how your solutions will complement each other to maximize resources and impact

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Designing an MVP

Question It Answers

How can a prototype quickly deliver on its actual value proposition to customers?

What it Does

Describes the ideal “car” version of your solution and the “skateboard” MVP that you can build and deploy quickly to test the value proposition

p. 23

Assumption Matrix

Question It Answers

How do you know what feedback to collect during your pilot?

What it Does

Documents everything critical you hope to learn from customers using your solution in the real world to ensure you know how your pilot will address those uncertainties

p. 25

Pilot Planning Template

Question It Answers

How should you organize and launch your pilot?

What it Does

Outlines the pilot timeline with key activities and milestones, determines which stakeholders, processes, technologies, and personnel will be involved, and identifies the types of feedback you will gather from customers

p. 27

Validation ‘Mad Lib’

Question It Answers

How do you know what feedback to collect during your pilot?

What it Does

Documents your learnings over the course of a pilot and tracks how you have proved or disproved your assumptions

p. 29

Measurement Pyramid

Question It Answers

How do your pilots connect to your organizational goals?

What it Does

Links your pilot solutions through an improved customer journey to your larger organizational goals

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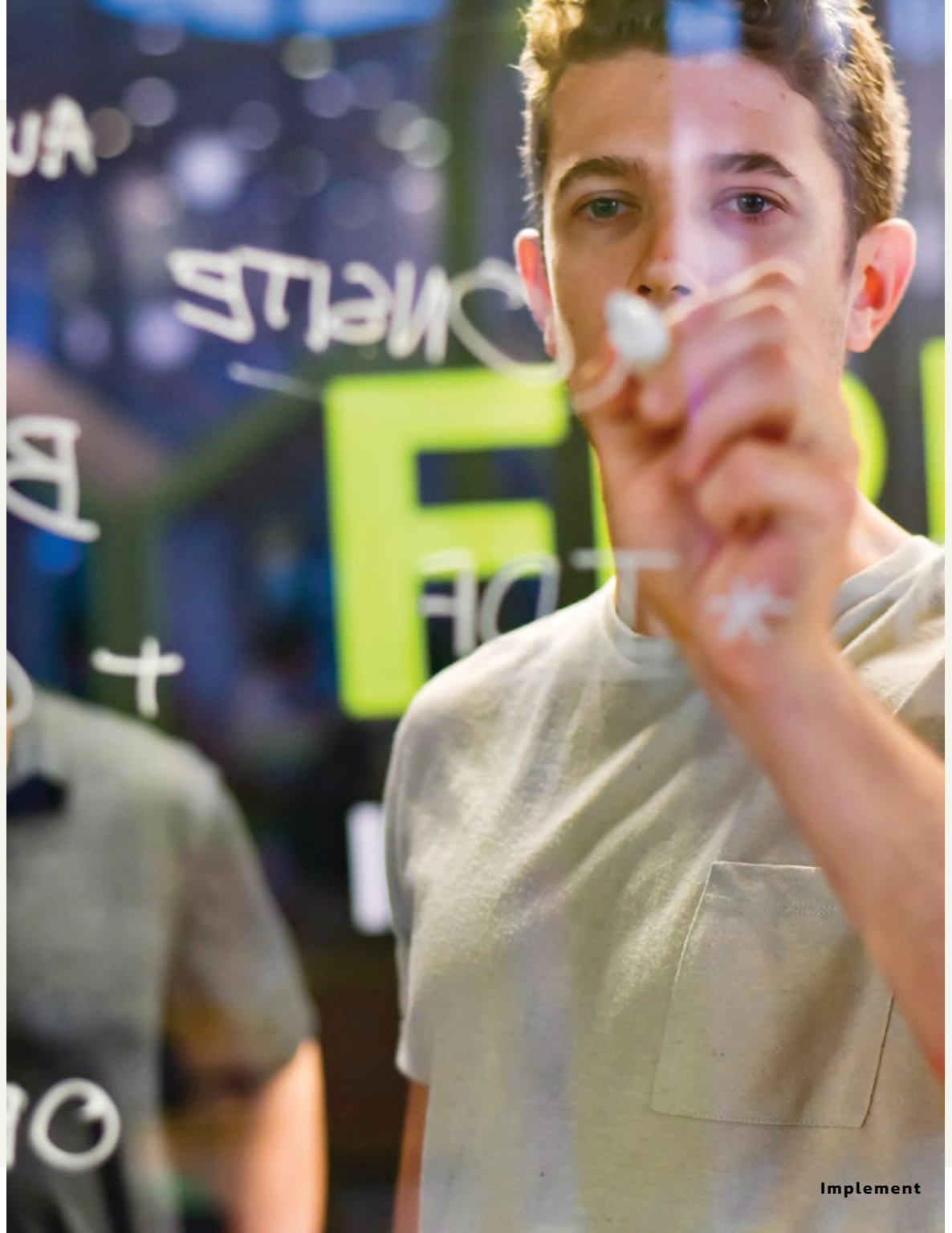
Metrics Tree

Question It Answers

How will you measure each level of the Metrics Pyramid for your pilot solution?

What it Does

Establishes specific metrics to track inputs, outputs, the customer journey, and the actions that will lead to your intended outcomes



Feasibility-Impact Matrix

Question it Answers

How should you prioritize your solutions for implementation?

How To Use It

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

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

Feasibility Considerations:

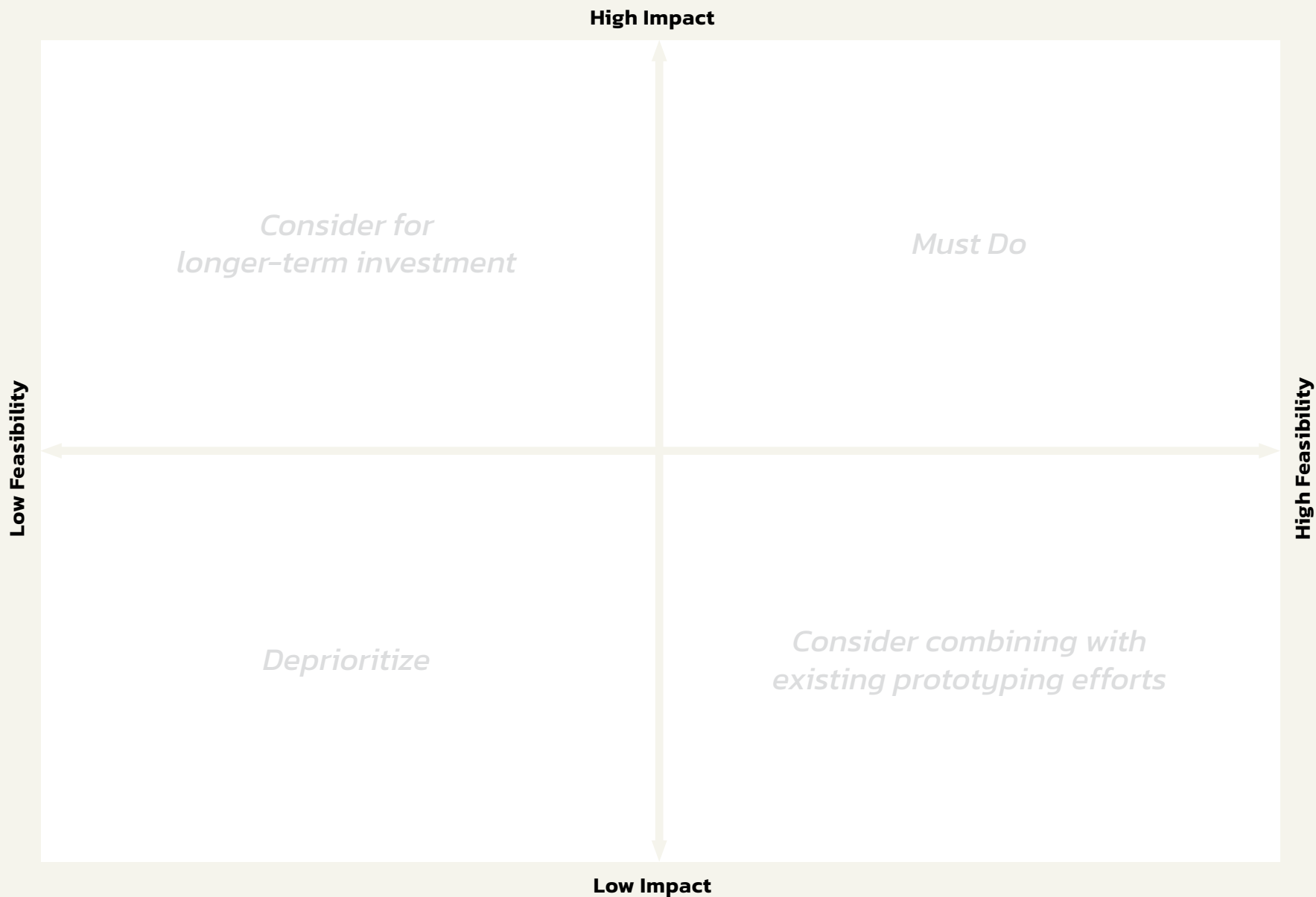
- Cost and availability of funding
- Staff time
- Scope and complexity
- Internal and external buy-in

Impact Considerations:

- Impact on customer experience
- Impact on strategic KPIs

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

Feasibility-Impact Matrix



Implementation Roadmap

Question it Answers

How should you organize the prototype implementation process?

How To Use It

An Implementation Roadmap allows you to see how all your solutions fit together into a single implementation plan. You can also use it to track pilot opportunities.

- 1 Enter your proposed solutions into the Quick Wins, Near Term, and Long Term categories based on your Feasibility-Impact matrix results.
- 2 Estimate when you plan to kick off a pilot for each solution and when you expect to be ready for a full rollout. Your estimates may change significantly as you learn and iterate.
- 3 Add in cost and impact estimates from your business cases. Costs should include both the cost to pilot, the cost for the first year of full rollout, and the annual run-rate for subsequent years. Your cost estimates may change significantly as you learn and iterate.
- 4 Under impact, note any key metrics you expect the solution to drive for your organization, as well as the impact you expect the solution to have on the customer experience.

Implementation Roadmap									
		Estimated Year 1 Investment				Impact		Timeline	
Solution	Pilot Opportunity	Cost to pilot (\$k)	Year 1 startup cost (\$k)	Annual run-rate (\$k)	Total Year 1 Cost (\$k)	Impacted KPIs	Other	Pilot	Roll-out
Quick Wins < 1 year	Prototype #1 Website experience updates: online checkout	\$15k	\$18k	\$2k	\$35k			Q1 '22	Q3 '22
	Prototype #2 Integrate Apple Pay as a checkout option	\$5k	\$8k	\$2k	\$15k			Q1 '22	Q1 '22
Near Term 1-3 years	Prototype #1 Develop customer profile & user dashboard	\$125k	\$225k	\$25k	\$375k			Q2 '22	Q1 '23
	Prototype #2							Q4 2021	2022
Long Term 3+ years	Prototype #1 Develop customer tracking & marketing system	\$350k	\$700k	\$100k	\$1.15M			Q1 '23	Q2 '24
	Prototype #2							2022	TBD
								2023	TBD
								2023	TBD



Implementation Roadmap

Estimated Year 1 Investment

Impact

Timeline

	Solution	Pilot Opportunity	Estimated Year 1 Investment			Impact		Timeline	
			Cost to pilot (\$k)	Year 1 startup cost (\$k)	Annual run-rate (\$k)	Total Year 1 Cost (\$k)	Impacted KPIs	Other	Pilot
Quick Wins < 1 year	Prototype #1							Q2 2021	2021
	Prototype #2							Q3 2021	2022
								Q4 2021	2022
Near Term 1-3 years	Prototype #1							Q3 2021	2022
	Prototype #2							Q4 2021	2022
								2022	2023
Long Term 3+ years	Prototype #1							2022	TBD
	Prototype #2							2022	TBD
								2023	TBD
								2023	TBD

Designing an MVP


Question it Answers

How can a prototype quickly deliver on its actual value proposition to customers?

How To Use It

Use the Designing an MVP tool to help turn your prototype into a concept that you can build for pilot testing.

- 1 Start by filling in the name of the solution and the value proposition for the ideal solution. What is the value it provides to customers?
- 2 Next, using sticky notes, write out the end-state functionality and experiences you want this solution to provide to your customers.
- 3 Finally, describe the functionality and relevant experience you want your customers to have in the near-term, mid-term, and long-term based on what is most important to them and what you can feasibly deliver within each time period. Each version of your solution should still deliver on your value proposition. Place the sticky notes in the corresponding columns.



Designing an MVP

Name of Solution: *Develop Customer Profile and User Dashboard*

Value proposition	Our customers can...		
	Near-term Functionality <i>"What could you launch today?"</i>	Mid-term Functionality <i>"What could you launch in 18 months?"</i>	Long-term Functionality <i>"What could you launch in 3+ years?"</i>
<p>1. <i>Online checkout is quicker</i></p> <p>2. <i>Online checkout is more secure</i></p>	<p><i>Customers can store their name and payment information in a simple profile</i></p>	<p><i>Customers can store multiple options for shipping addresses and multiple payment options</i></p>	<p><i>Customers can create full profile with the option to select default address, payment information, shipping preferences</i></p> <p><i>Customers can receive suggestions on clothing options based on personal preferences</i></p>
Solution's End-State Functionality	Our customers experience...		
	Near-term Customer Experience	Mid-term Customer Experience	Long-term Customer Experience
<p><i>Ability to store customer profile details, multiple payment methods, multiple shipping addresses, shipping preferences</i></p> <p><i>Ability to receive clothing item suggestions based on preferences to make overall purchasing experience faster / more streamlined</i></p>	<p><i>Increased security by not having to re-enter personal financial information for every checkout</i></p>	<p><i>Increased ease and faster checkout, even if not shipping to primary address or using primary card details</i></p>	<p><i>Increased ease, flexibility, and security by not needing to enter any information upon checkout</i></p> <p><i>Purchase suggestions that will make the overall purchasing quicker</i></p>

Designing an MVP

Name of Solution:

Value proposition

Our customers can...

Near-term Functionality

"What could you launch today?"

Mid-term Functionality

"What could you launch in 18 months?"

Long-term Functionality

"What could you launch in 3+ years?"

Solution's End-State Functionality

Our customers experience...

Near-term Customer Experience

Mid-term Customer Experience

Long-term Customer Experience

Assumption Matrix

Question it Answers

How do you know what feedback to collect during your pilot?

How To Use It

An assumption matrix helps you think through and document everything critical you don't know and hope to learn from speaking with and observing customers in the real world.

- 1 Think through the questions you have for your customers and the answers you expect to receive. For each, consider how confident you are that your assumptions are correct. Next, consider the possible impacts your assumptions could have on the success of your project.
- 2 Plot all assumptions on the matrix.
- 3 As you collect customer feedback, prioritize validating the riskiest assumptions that would have the highest impact on project success (upper right quadrant). Deprioritize the most validated assumptions with the least impact on project success (lower left quadrant).

Keep in mind:

- **Impact** is on a spectrum from: the project will fail due to a wrong assumption to the project will have a small roadblock
- **Validated** is on a spectrum from: known to unknown

Assumption Matrix



Pilot Planning Template

Question it Answers


How should you organize and launch your pilot?

How To Use It

A pilot planning template helps you plan your first 90-day implementation “sprint” in order to quickly deliver value and gather feedback for the next iteration. Start at the right most column, labeled “90-Day Target.”

Set a target for the milestones you want to achieve in 90 days. Then, work backwards to fill in the activities you want to carry out and benchmarks you want to achieve to reach those milestones.

- 1 List the stakeholders you want to engage over 90 days. Then, work backwards to fill in each stakeholder at the point in which you plan to engage them.
- 2 List the feedback you plan to solicit over 90 days. Then, work backwards to fill in the feedback topic at the point in which you plan to request it.
- 3 Finally, list which any other activities, technologies or processes you will need to have in place within the 90-day period.



Pilot Planning Template

Name of Solution:

	Prepare to Launch				Launch & Measure		90-Day Target
	Month 1		Month 2		Month 3		
	Week 1-2	Week 3-4	Week 5-6	Week 7-8	Week 9-10	Week 11-12	
Key Activities & Benchmarks	Confirm compliance with Apple Pay guidelines	Create Developer account	Set up server for secure comms to Apple	Create merchant ID and certs; verify domain	Conduct sandbox testing	Collect feedback/ incorporate based on survey	Milestones (key objectives) Integrate Apple Pay as a check-out option in NE
Engaging Stakeholders	• IT • Developers	Apple reps			Apple reps	• IT • Customers	Engaging Stakeholders (people) • IT • Developers • Apple reps • Customers
Feedback Plan	Is Apple Pay a viable option based on guidelines?				Does Apple Pay reduce checkout time?	Does Apple Pay improve ease of checkout?	Feedback Processes Does this save time for customers?
							Other Activities (technology & other processes)

Pilot Planning Template

Name of Solution:

Prepare to Launch

Launch & Measure

	Prepare to Launch				Launch & Measure		90-Day Target
	Month 1		Month 2		Month 3		
	Week 1-2	Week 3-4	Week 5-6	Week 7-8	Week 9-10	Week 11-12	
Key Activities & Benchmarks							Milestones (key objectives)
Engaging Stakeholders							Engaging Stakeholders (people)
Feedback Plan							Feedback Processes
							Other Activities (technology & other processes)

Validation 'Mad Lib'

Question it Answers

How will you monitor customer feedback during your pilot?

How To Use It

The Validation 'Mad Lib' template helps document your learnings over the course of a pilot and track how you have proved or disproved your assumptions. It is a convenient method for collecting the results of tests, observational research, customer interviews, and other feedback tools.

- 1** Fill out the "We believed that" statement for each test you are planning to run during the pilot.
- 2** After the test, fill out the "We observed" statement to document what information you captured.
- 3** Next, fill out the "We've learned that" statement to record what learnings you will take away from the test.
- 4** Finally, fill out the "We will" statement to track how you will adjust future tests based on your learnings.

Validation 'Mad Lib'

1 We believed that *(what test/prototype & how will your customers respond)*

2 We observed *(what did you see/hear/smell/feel)*

3 We've learned that *(what did you learn)*

4 We will *(how will you adjust/pivot for next test)*

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

Metrics Tree

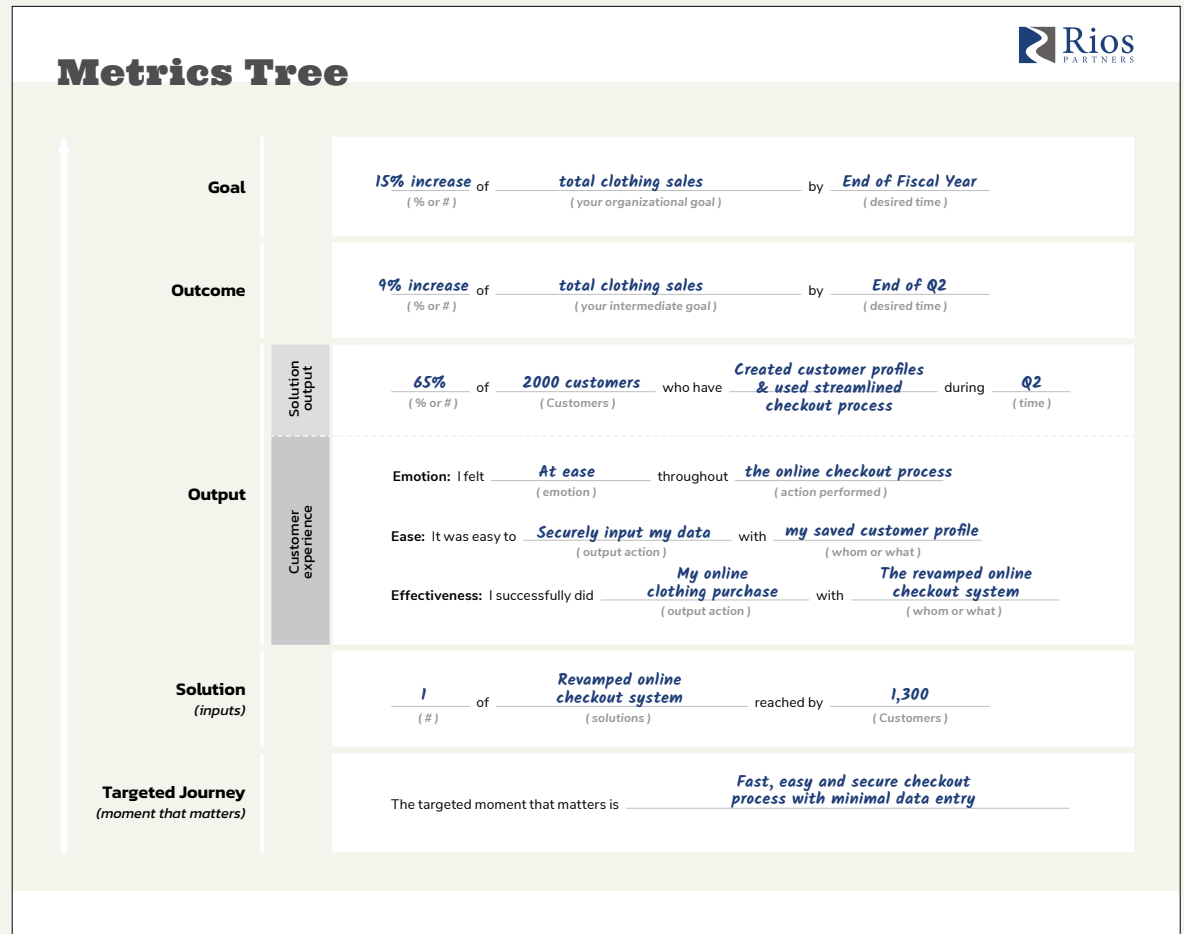
Question it Answers

How will you measure each level of the Measurement Pyramid for your pilot solution?

How To Use It

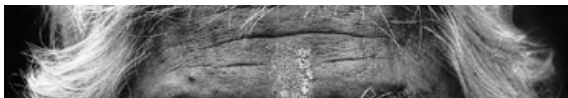
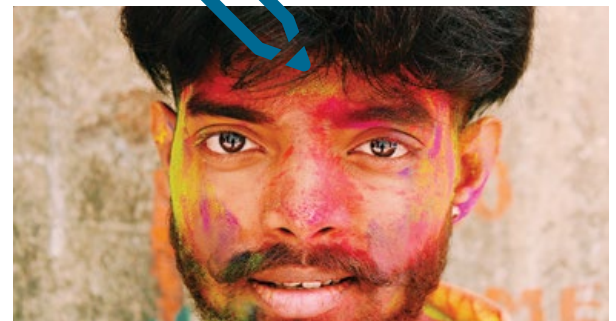
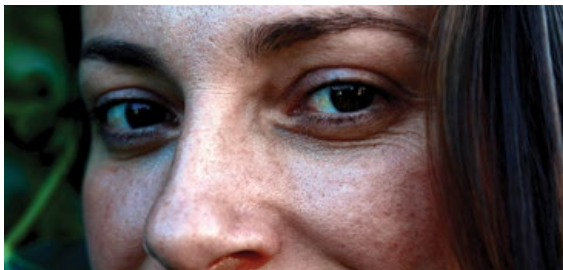
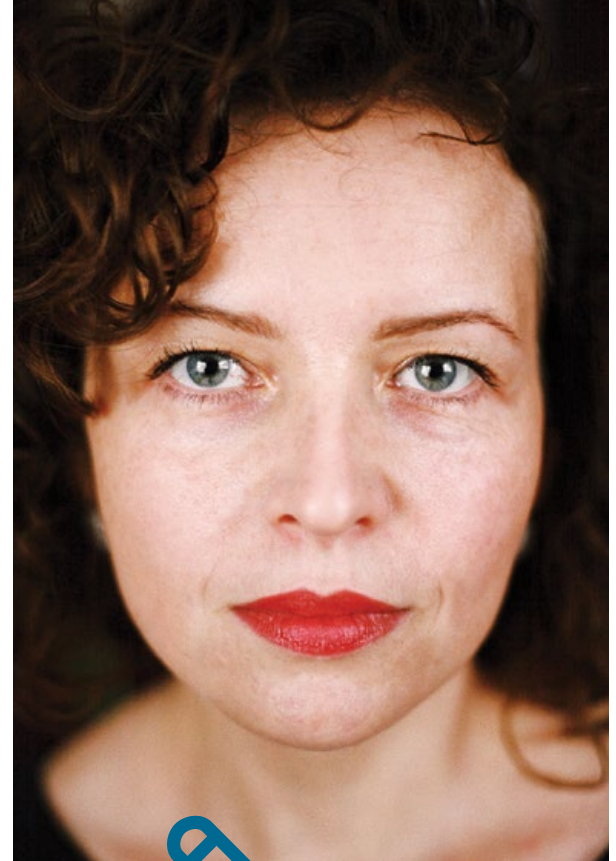
A Metrics Tree helps you establish quantifiable metrics to track progress from your solution through every level of your Measurement Pyramid to your organizational goals.

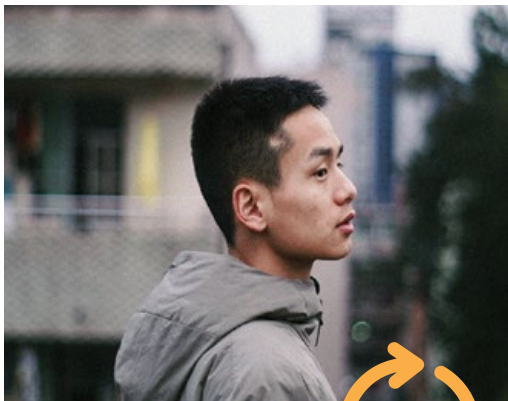
- 1 Start by filling in your Goal at the top.
- 2 Now start at the bottom and move up to the goal. This will help ensure that your measurements are connected to the top-level goals. Consider how you'll measure inputs (e.g., number of products built) and outputs (e.g., number of products used) of your pilot.
- 3 Next, determine how you will measure qualitative customer experience of your pilot using effectiveness, ease, and emotion statements (e.g., On a 1 to 5 scale from strongly disagree to strongly agree: "It was easy to get where I needed to go using this product").
- 4 Finally, document how the outputs and the improved journey will drive quantitative outcome metrics (e.g., number of subscription renewals; percentage of customers who lack safe transportation). Keep ladderling up your metrics until you arrive at your organizational goals.



Metrics Tree

↑	Goal	_____ of _____ by _____ (% or #) (your organizational goal) (desired time)	
	Outcome	_____ of _____ by _____ (% or #) (your intermediate goal) (desired time)	
	Solution output	_____ of _____ who have _____ during _____ (% or #) (Customers) (desired action or shift) (time)	
	Output	Customer experience	Emotion: I felt _____ throughout _____ (emotion) (action performed)
		Ease: It was easy to _____ with _____ (output action) (whom or what)	
Effectiveness: I successfully did _____ with _____ (output action) (whom or what)			
Solution (inputs)	_____ of _____ reached by _____ (#) (solutions) (Customers)		
Targeted Journey (moment that matters)	The targeted moment that matters is _____		





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