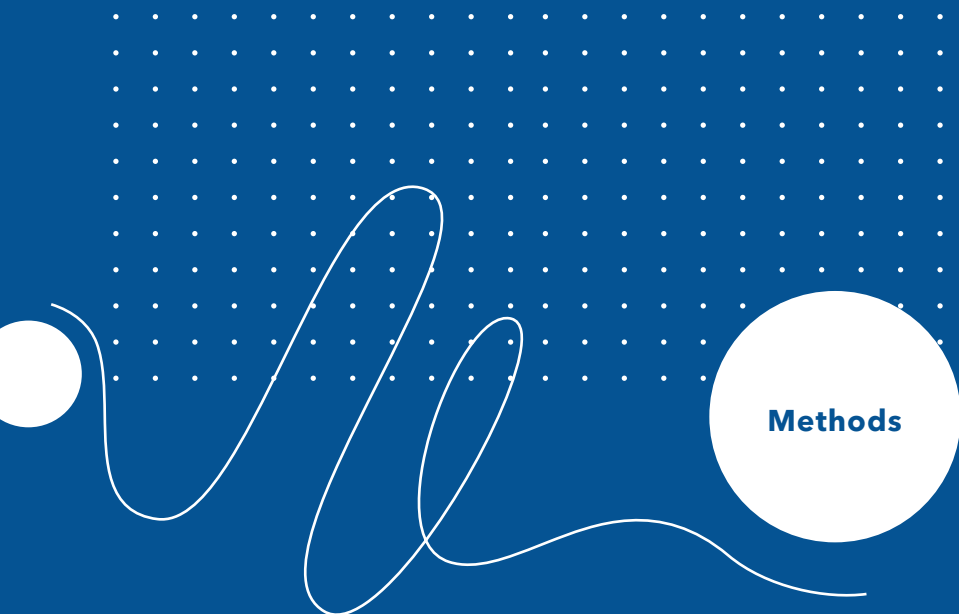


# DESIGN FOR DELIGHT





## EMPATHY DEBRIEF

You have customer empathy research findings and want to dive deeper as a team. The empathy debrief allows time and space for discussion of everyone's observations as well as differing perspectives. This ultimately helps a team align on the customer pain that they are going to solve. This method allows us to savor those surprises, uncover and discuss customer pain points, and identify patterns and themes. Debriefing helps us identify the key things we need to tackle in service to solving our customer's pain.

### How to do it:

You can use a whiteboard or a flip chart along with post-its, sharpies, and markers. Alternatively, you can debrief online using tools such as Mural or Google Docs. On the whiteboard, flip chart or virtual tool, draw a line down the center and title one side "Surprises" and the other side "Pain Points". Capture the group's answers as you go.

**Savor surprises.** Focus your team in discussing surprises first and dig deep as to why they found that observation so surprising. Ask: "What was unexpected?" "What was odd or didn't make sense?"

**Seek the pain point.** Once you have discussed all the surprises, focus on the customer pain points. These may be obvious if your customers verbally called these pains out. However, some may be less obvious due to the fact that it has become a way of life for your customers and they are not as aware of their pain level. Ask "What were the largest pain points that each of you observed?" "Where did you see strong emotion?"

**Step back.** Look for patterns that emerge, and feel free to cluster into themes. Circle and mark the patterns and themes that surface to help guide your team to identify the biggest pain that you should focus on first. Note the top ahas and insights for further exploration.

**Time:** 45-60 minutes per customer

## ★ PRO TIPS

- Using two different markers and alternating colors from each surprise or pain point will allow your team to scan at a glance and allow them to easily differentiate one point from another.
- Encourage everyone to share by actively listening, being curious, and writing down what's shared.
- Involve all team members and ask them to reflect: "Anyone else want to add onto this one?" "Who else has found a surprise?" "Did anyone else see something similar?"
- Dig deeper into what's shared by asking questions, such as "Why did the customer do XYZ?" "Why was the customer feeling XYZ?" other "Why's"
- Follow up on specific behaviors: "What is the behavior you observed? What did you see, what was the customer actually doing?"

### Helpful prompts:

What surprised you?

What did you observe that was unexpected?

What was an anomaly?

What did you see that was different from your life experiences?

What were the biggest pain points you observed?

Where did you see the biggest areas of negative emotion?

Where did you see folks investing time/effort in a work around?

## FOLLOW-ME-HOMES

Follow-me-homes are a fast and easy way to observe people experiencing the problems and pains we hope to solve. By observing real behavior, we gain insights, empathy, and shared understanding. We avoid second-hand information which might not be accurate, and create opportunities to be surprised.

### How to do it:

1. Start by deciding what type of situations or behaviors you wish to learn more about, then identify the customers you'll observe. Follow-me-homes are often conducted together as a small working team.
2. Find real customers (and/or potential customers) who you can "follow home". Reach out to your personal network of friends and family, or simply ask anyone who is your target customer.
3. Go to where the customer is experiencing the problem. Visit them in their home (ie: consumers), office (ie: small business), or anywhere in their natural habitat. Alternatively, you can connect virtually with them using video conferencing.
4. Set the context, observe and ask why, then wrap up and say thank you.
5. Debrief with your team. Share observations, pain points, and surprises.

**Time:** 45-60 minutes per customer

### ! WATCH OUT

Don't interview. It's OK to ask a few questions to get the conversation started, but don't let your follow-me-home turn into an interview. Focus on observing real behavior, listening, and asking "why" questions.

### ★ PRO TIPS

**Have a learning mindset.** Be curious and observe carefully. A Follow-me-home is not an interview. You want to see real behavior, not just hear talking.

**Ask customers to show you.** If the customer describes something they do, ask for a demonstration and to see real artifacts from their work.

**Look for surprises.** Insights often come from unexpected or unusual behaviors.

**Ask why.** Ask follow-up questions to dive deeper on behaviors or workarounds that you observe. Why did they choose to do it that way? Why?

**Everyone takes notes.** Each member of the team should listen, observe, and jot down their observations to share when the team debriefs.

**Debrief as a team as soon as possible.** Get together with your team, preferably within minutes, and capture the surprises and pain points you observed.

## Example:

Imagine a team is interested in learning more about the pains and problems small businesses experience when sending invoices to their customers. One team member has a friend who owns a small business, so they ask the small business owner if they can visit her office.

### **Before you go**

Make sure the customers you plan to visit are real customers or potential real customers. In this case, make sure they send invoices frequently. Ask one or two team members to join you, so you'll have multiple perspectives and help recording what you hear and observe. Respect your customer by arriving at the customer's location on time.

### **When you arrive... Set the context (5 min)**

You: "Nice to meet you [customer name]. Thank you so much for taking the time to meet us today. Our goal is to learn more about challenges you encounter when sending invoices to your customers. We are hoping to learn from you."

### **Observe and dig in deeper (15-45 min)**

You: "OK, let's get started. Can you show me how you send an invoice to one of your customers? (Observe, and listen to the customer's story.)

You: "That was very interesting. Can you show me more?" (Observe)

You: "Why did you do it that way?" (Listen to the customer's answer.)

You: "Interesting, can you show us what you did next..?" (Observe)  
(continue asking questions as needed...)

### **Clarifying questions you might ask**

Why do you do it that way? What is good about the process? What do you hate most about it? Why? What's the very next thing you do afterwards? What do you do before? Why? Can you show me exactly how you do it in detail, step by step? Why those steps? Do you mind if I take a quick picture of it (then take a picture)?

### **Wrap up**

You: "Wow, [customer name]. We really learned a lot by watching how you work. We'll use this information to help us improve the product. Thanks so much for your time today." (End the follow-me-home visit)

### **Debrief as a team**

As soon as possible after the Follow-me-home (in the car ride back to the office or at a nearby coffee shop), ask to hear your teammates' observations.

You: "OK team, what pain points did you observe? What surprised you most?"

## DEEP PROBING INTERVIEWS

Observing behavior shows us what people do, but not why they do it. Deep probing interviews are one good way to understand why people behave as they do. Deep probing interviews are best when used to understand behaviors that just occurred, such as why a person just started a trial, or why a person recently stopped using a product. Proximity to the actual behavior is important—strive to conduct interviews as close as possible to the behavior you wish to learn about.

**How to do it:** The first answers customers provide to our questions are often not the real reason or root cause answer. Repetitive probing questions help get to the real answer or root cause. To dig deeper, repeat the same or similar questions in order to probe deep on the topic.

1. Decide what behavior you want to learn more about (for example, why are customers canceling their subscriptions).
2. Find a source of people right in the moment or right after the moment of that behavior - ideally within minutes or hours. For example, call phone numbers of customers when they cancel their subscription, or observe in person if possible.
3. Ask deep probing questions about the behaviors, repeating if necessary.

**Time:** 45-60 minutes per customer

### ! WATCH OUT

Interviews, even deep probing ones, are not a substitute for observing actual customer behaviors. What people say is often different from what they do.

### ★ PRO TIPS

**Build rapport first.** Connect with your customer before asking questions.

**Use affirmation statements** so that customers don't feel self-conscious.

**Start by stating the observed behavior.** For example, "I saw you canceled your subscription yesterday." Then follow up with open-ended probing questions.

**Ask why.** Keep drilling down in order to get to specificity and to understand the root-root cause.

**Repeat the probing questions multiple times (or similar probes).** For example, you might ask "why is that?", followed by "how come?", then "why?" three times in a row, so the customer must continue answering.

**Don't give advice or try to sell.** Your goal is to listen and understand the customer's behavior, not to change their behavior.

# Example Probing Interview Questions

If you are new to this method, spend a few minutes practicing together as a team. Learn how to conduct deep probing interviews, then role-play a few practice interviews so the team can watch one another. Ask each person on the team to practice and be critiqued by their peers, until each person does it well.

Remember you might need to repeat your probing questions in order to get beyond high level responses, and get specific answers to the customer's pains, problems, and goals. The questions below are not prescriptive, or a step by step sequence, they should be viewed as inspiration to get you started.

## General

Can you tell me more about that?  
Why is that good? (if customer mentions something good)  
Why is that bad? (if customer mentions something bad)  
How does that happen?  
Tell me the steps you went through.  
How did this start?  
What else did you try?  
Can you go back to the part about X?  
What exactly did you mean by that?  
What was going through your mind when you did X?  
What were you hoping to see?  
What exactly did you see?

## Goal Related

What were you trying to achieve?  
What's the outcome you'd wish for?  
What was your intention?  
What was your expectation?  
How will you know when your goal is reached?

## Root Cause

Why is that? And why is that? etc...  
So what caused that to happen?  
What was behind that decision?  
What was your reasoning there?

## Confirm

Can you say that again to make sure I got it?  
Let me recount what you said to make sure I got it...



## CUSTOMER PROBLEM STATEMENT

Before we attempt to solve a problem, the most important thing to agree on as a team is the customer problem we're solving. If we don't agree on the customer problem, or we see it differently, it is hard for any team to work well. Customer Problem Statements help describe in detail "What is the customer problem?", so teams can align and agree on which problems to solve, and communicate with partners and stakeholders.

**How to do it:** Customer Problem Statements can be written anytime, but are most often written after conducting customer empathy methods such as Follow-Me-Homes, or after a customer debrief. The template can help get you started.

1. Go broad, and write down many potential problem statements based on your recent customer empathy. Don't speculate, focus on real problems you've actually observed. If you observed more than one problem, which is often the case, then write a specific problem statement for each one.
2. Share and discuss your list of problem statements as a team
3. Go narrow, and select a single problem statement on which to focus
4. Include problem statements in your team's communication

### ! WATCH OUT

The problem statement itself is not as important as the process your team will go through to develop it. Your understanding of the customer problem will improve over time, so don't be surprised if you and your team revisit and update the customer problem statement from time to time.

### ★ PRO TIPS

**Find the customer's problem, not Intuit's problem.** The "I" in "I am" is the customer, NOT you or Intuit

**Write specific, tangible, and detailed, using full sentences.** Avoid vague catch-all words such as "integration" or "personalization"

**Leave solutions out.** Avoid suggesting a solution in the problem statement.

**Look for the biggest pain.** Look for facial or physical reactions indicating pain. Look for "compensating behaviors" customers do to prevent or deal with pain.

**Write more than one problem statement.** Try writing many different problem statements based on what you observed

# Customer Problem Statement

**I am a:** \_\_\_\_\_

A narrow description of the customer (not you!) that highlights their motivations, attributes and/or characteristics

**I am trying to:** \_\_\_\_\_

Desired outcome

**But:** \_\_\_\_\_

Problem or barrier

**Because:** \_\_\_\_\_

Root cause

**Which makes me feel:** \_\_\_\_\_

Emotion



**DOWNLOAD**

Visit **[D4D.intuit.com](https://D4D.intuit.com)** to download worksheets and templates.

## THE IDEAL STATE

The Ideal State is a description of a future state where an important customer problem or opportunity has been solved to such an amazing degree that the outcome seems almost impossible. For example, when the Khan Academy describes their goal “providing a completely free education to every single person on earth”. That’s an Ideal State.

**How to do it:** Write down your Ideal State after you have identified one or more customer problems. The Ideal State template is designed to be the big bold, futuristic “flip side” of your customer problem statements.

1. Refer to your customer problem statement(s) as your starting point.
2. From the customer’s point of view, imagine “a perfect world” in the customer’s future, then write down as many Ideal States as you wish to using the Ideal State template.
3. From your Ideal State templates, select one Ideal State that best captures the future vision for your team. The best Ideal States motivate and inspire.

**Time:** 15-20 minutes

### ! WATCH OUT

Don’t stop with an incremental Ideal State, or an Ideal State that describes solutions that already exists today.

### ★ PRO TIPS

**Be bold.** This is your opportunity to think big! The Ideal State should be aspirational, and borderline impossible to achieve.

**Customer-backed.** Ideal States are written from the customer’s perspective.

**Focus on the customer benefit.** Avoid describing a specific solution. Instead, focus on describing the customer benefit: what is the dramatic improvement in the customer’s life we hope to help them achieve?

**Flip a problem.** Imagine the complete opposite of the customer problem you identified. What does the world look like when the problem is perfectly solved?

**Be specific, tangible, and measurable.** An effective Ideal State is clear and measurable: how high is up? How will you know when you have achieved it?

**Define “From-To” states.** Write down words or sketches that highlight what the current state looks like, feels like, and sounds like. Then repeat the same exercise to highlight what the Ideal State looks like, feels like, and sounds like. Finally, fill out the Ideal State template using the “from-to” states as inspiration.

## Ideal State Template

**In a perfect world:** \_\_\_\_\_

Bold statement of a future state that is borderline unachievable (perfect outcomes, not specific solutions)

**The biggest benefit to me is:** \_\_\_\_\_

The improvement in the customer's life once the Ideal State is achieved.

**Which makes me feel:** \_\_\_\_\_

Emotion



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## Example: Toyota

Toyota Motor Company has a reputation for building the most reliable vehicles in the automotive industry. When Toyota first entered the auto industry in 1937, cars were unreliable, and often broke down leaving motorists stranded. Although we were not at Toyota's headquarters to observe the founders write down an Ideal State, we can imagine it might look something like the example below.

### **Toyota's Ideal State:**

**In a perfect world:** Vehicles never break down

**The biggest benefit to me is:** Reliable car to drive, no worry of break down.

**Which makes me feel:** Safe and confident when I drive

## BRAINSTORMING

When the team has defined key opportunity areas with “How might we...” questions, it’s time to start brainstorming. Remember – this is your time to go broad and get all your ideas out there. Teams tend to use the word brainstorm to describe casually talking about ideas, but a brainstorm is actually a focused, purposeful activity.

“The best way to get a good idea is to get lots of ideas, then throw the bad ones away.” - Linus Pauling

**How to do it:** Refer to your brainstorm topics, such as “how might we” statements or Ideal States, and remind participants of the ground rules.

1. Choose a topic on which to brainstorm
2. Warm up with a quick 1-2 minute practice exercise
3. Begin brainstorming! If participants encounter slumps, encourage them to continue by using prompts and constraints.

The perfect group size for brainstorming is 4-6 people. For larger groups, simply break into smaller sub groups. Don’t brainstorm as a group of 15 people.

Get warmed up. It’s important to get the group in the right frame of mind for a brainstorm. Go over the ground rules, then get loose. Encourage creativity and fun without judgment of any kind.

Consider designating a facilitator for your brainstorm, such as an Innovation Catalyst, so they can pay attention to the energy of the group, keep everyone focused, and push for quantity. A facilitator should not participate in the brainstorm. You might even need more than one if you have big groups.

Supplies matter. Space matters. Small post-its lead to two word ideas, so use the 3x5 post-its. Pens lead to writing that’s hard to read at a distance, so always use sharpies - one idea per post-it. Each idea should be clear and concise enough so that other people reading it will understand the idea.

### ! WATCH OUT

Be mindful to ensure that diverse voices, perspectives, and personalities are expressed equally. Encourage quiet people to share, and remind energetic people to provide space for others. It takes a village to generate great ideas!

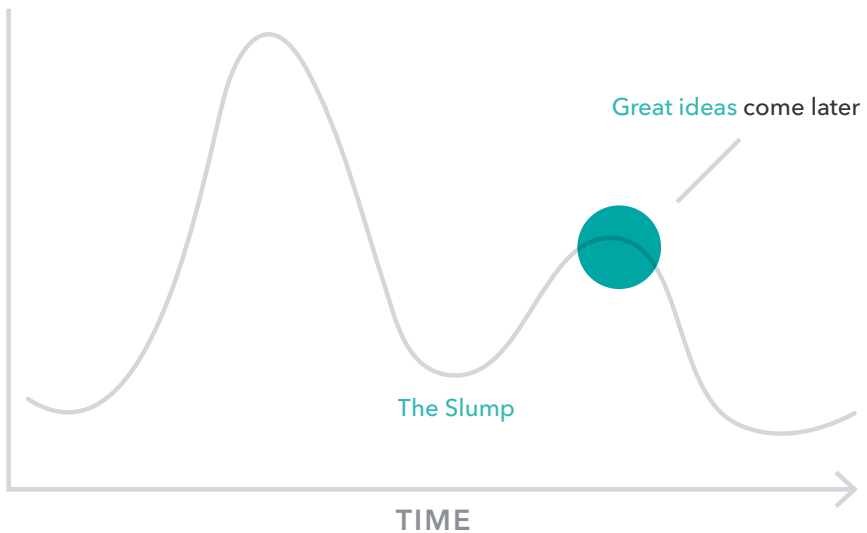
# Ground Rules

Before you begin brainstorming remind everyone of the ground rules below to ensure a positive experience.

1. Defer judgment.
2. Encourage wild ideas.
3. Build on the ideas of others.
4. Stay focused on the topic.
5. One conversation at a time.
6. Be visual.
7. Go for quantity.

*Thanks to IDEO for the ground rules.*

## Embrace the slump



### ★ PRO TIPS

**Embrace the slump.** Obvious ideas will come out first, then there will be a slump in ideas and energy. The best ideas often come next, so push past the slump by adding creative constraints like "What if we had no money?", "What would get us fired?", or "What if we had to build it in 24 hours", etc...

## 7 TO GET 1

The 7-1 method is a great way to turbo-charge your brainstorming, and help you and your team explore truly different ideas. Most of us we have a tendency to lock onto our first ideas, and believe our initial ideas are the best. Research and observation shows us that our initial ideas are often not the best ideas, and in fact the best ideas come from exploring a wide variety of divergent ideas. This 7-1 method is one way to help do it.

**How to do it:** Start by capturing your initial idea you believe would be best. Then consider several divergent ideas which are very different, sharing your ideas with other team members as you go. Generate new ideas based on what you hear from others, remixing, rebuilding, and re-creating. Strive for each idea to be very different.

1. Start by asking each team member (and yourself) to silently write down or sketch their "best idea" on a single sticky note, or in one box if using the "7-1 Worksheet". Do this in just 1-2 minutes.
2. Quickly share your ideas with the rest of the team, brainstorming and writing down and sketching additional ideas that emerge as you go. Try your best to be bold, and consider very different ideas.
3. Continue sharing as you remix, rebuild, and generate new ideas until each person on the team has at least 7 distinctly different ideas.

**Time:** 10-15 minutes

### WATCH OUT

If you want bolder ideas after your initial 7, select the boldest idea on your 7-1, then start the process over again using the boldest ideas as your starting point.

## ★ PRO TIPS

**Be bold.** Include crazy ideas, anything goes! Do not filter or critique at this stage. Don't worry if ideas are feasible in the short term. Consider crazy ideas from other products, other industries, or from nature.

**Think outside the box.** You know you're on the right track if all of your ideas are very different from each other. Make sure each idea is very different, avoid simple "variations" of the same theme.

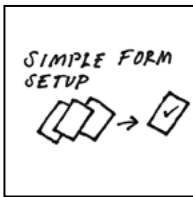
**Be inclusive.** Be sure everyone on the team has a chance to share their ideas multiple times, and don't judge or critique ideas as they flow.

**Go for volume.** The best way to have good ideas is to have lots of ideas. Be sure your ideas are specific and tangible, so they are understood by others.

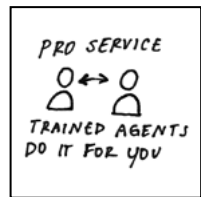
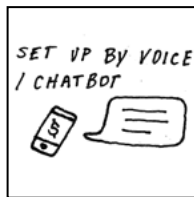
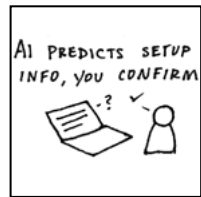
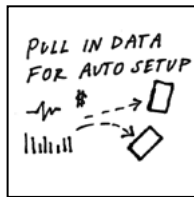
**Build on and remix ideas.** Your teammates' ideas will likely spark new ideas for you, so capture these new ideas and keep new ideas flowing.

**Keep moving.** Don't get stuck over-thinking or over explaining one particular idea. Jot ideas on a sticky note and move on.

1. Write down and sketch your first idea:



2. Then, sketch 6 more ideas that are entirely different from your first idea...





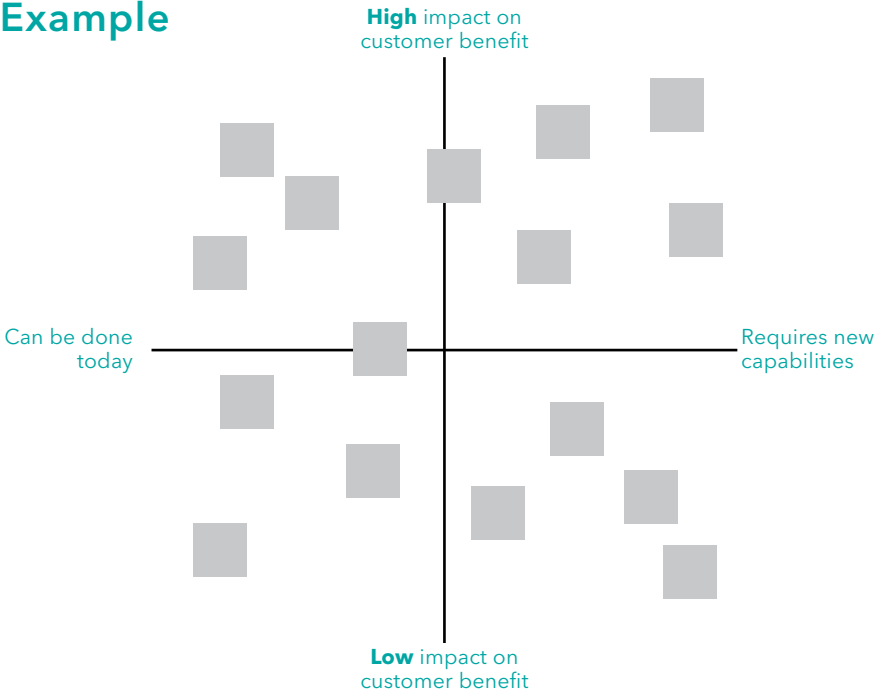
## 2X2 NARROWING

Narrowing is about making decisions with intention. It's not about reaching consensus on the easiest idea to implement or voting for your favorite.

When you vote with your opinion, you just encourage group-think and bias. You throw away all the rigor you've brought to innovating for customers.

There are a handful of tools to help teams narrow, but a 2x2 is probably the most accessible and effective. A good 2x2 forces the team to balance the tension between two distinct criteria. Ideas are then placed on the 2x2 matrix relative to each other, which fosters productive debate and intentional decisions about which ideas the team will pursue. For example, the 2x2 below uses the criteria "requires new capabilities" (horizontal axis) and "Impact on customer benefit" (vertical axis).

### Example



**Discuss as a group** - Honor the different perspectives on your team.

## How to create a good 2x2 criteria

Make sure your criteria are customer-backed. Good axis criteria are important for the customer problem you're trying to solve, or related to your ideal state. Include your team in the process, so you avoid bias and make transparent decisions.

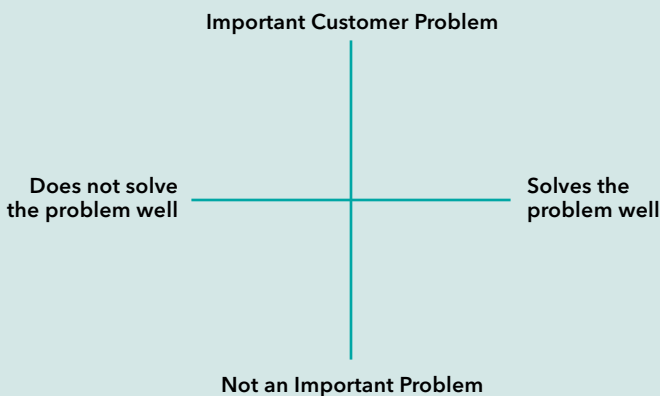
Create real tension between your criteria. If all your ideas are in one quadrant, there's no tension pulling them apart.

Be clear why each criteria matters. The top-right quadrant doesn't always win. Sometimes a 2x2 can help you map the whole landscape of options and make decisions. You might choose to pursue the lower-right quadrant, and the 2x2 will have helped you make that decision with intention.

Make changes if your first attempt is not working. Be ruthless about prototyping your 2x2. Start using post-its for each axis criteria so you can easily change the criteria if they aren't working. The more you iterate, the better your conversations will be about which criteria really matter for your decision.

### ★ PRO TIPS

If you're new to this method, start with CDI principles for your axis criteria. Remember, you can always change the criteria and re-prioritize if your first attempt is not working.



# STORYBOARDS

Once you have narrowed to a specific idea, it is important to make the idea tangible so you can communicate the idea to others. Creating a simple storyboard helps answer key questions about how your idea works in the real world, such as how customers engage with your idea, how it works technically, and what the key moments are in the experience.

**How to do it:** Consider how your solution idea works in practice, as the customer engages with the idea. Focus on the key moments in this journey, then draw each moment with a quick description. Most often we focus storyboards on 6 key “moments”, but you can add more moments if more detail is needed.

1. Fold a piece of paper into 6 squares (or use 6 sticky notes, or 6 pieces of paper, etc.), then draw a picture of the following steps in each of the 6 boxes, along with brief description. Be clear and concise, so someone else can understand you.
  - Box 1 - The customer experiencing their problem in context
  - Box 2 - How the customer discovers the proposed solution idea
  - Boxes 3, 4, and 5 - The “steps” or sequence of events the customer experiences
  - Box 6 - The end result, where the customer benefit is delivered
2. Share your storyboard with someone who is not familiar with your concept, and check to see if they understand your idea. Use their feedback to improve or clarify the storyboard as needed.
3. Update your storyboard to include more “steps” and more detail as you learn what works and what does not, and to help foster a conversation on your team.

**Time:** 15-20 minutes

## ! WATCH OUT

Avoid words or drawings which are too abstract or high level. Try your best to draw what it actually might look like when a customer uses your solution.

Don't waste time making your drawings perfect. Just capture the essence of the idea quickly, so you don't over-think it.

## ★ PRO TIPS

**Be visual** Show how your solution will impact the customer in their daily work. Tell a story with pictures that will bring the idea to life.

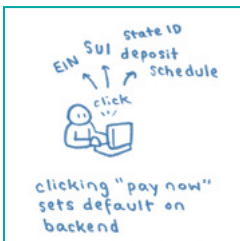
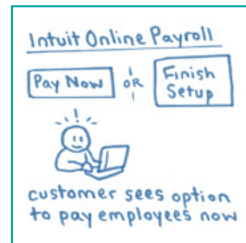
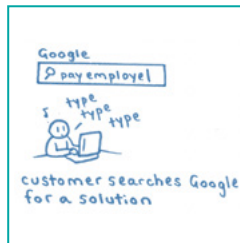
**Keep it simple** You don't have to be an artist to make a great storyboard. Stick figures will do just fine!

**Everyone draws** Get the whole team to participate in creating the storyboard. Everyone will feel more ownership of the final idea.

**Keep it high level** No need to detail out the specifics of the interface or precise implementation plans yet. Remember, the goal is to make your overall idea concrete so you can start to test it.

**Show someone** Have a colleague or customer review your storyboard to make sure your solution is clearly expressed.

## EXAMPLE:



## 100 POINT NARROWING

The "100 points" is one method to quickly narrow. Use this method after going broad, when your team has many options and must narrow. e.g. too many customer types or situations, too many customer problems, too many different ways to solve a problem, or too many features, etc.

How to use it: Allocate 100 points to each person in your group, then ask each person individually to allocate their points to each idea, based on a specific criteria such as "Which idea provides the biggest customer benefit" or "solves the biggest customer problem". Once allocated, tally the points for each idea.

### How to do it:

1. Place your ideas generated from your brainstorm where they can be viewed by all team members (on a white board, or table, etc.). Take a quick moment to remove duplicate ideas.
2. Allocate 100 points to EACH PERSON on your team. Then ask each person to allocated their individual points across the ideas they believe fit the criteria provided. Note, points may be allocated in any manner each person sees fit. Write the points next to each idea, or on the sticky note for each idea.
3. Once each team member has allocated their points, tally the points for each idea and write down the total points received for each idea.
4. Focus on the idea that received the most total points. Usually, one is the clear point winner, but it is OK if there is a close 1 and 2 (remember, you can experiment with more than one idea).

Optional: If the decision is not clear, reallocate your 100 points across the top 2-3 ideas from the first round of points (ignore the other ideas).

**Time:** 15-20 minutes

### WATCH OUT

This method is an aid to judgment, not a replacement to judgment. Do your best to focus on the customer-backed decision criteria, not your opinion or what will be easiest to build.

## ★ PRO TIPS

**Include bold ideas.** Be sure your idea list contains big and bold ideas. You can't narrow to a bold idea if there are none on your list to start with.

**Customer-backed criteria.** Pick one customer-backed goal or criteria on which to decide how you'll allocate points.

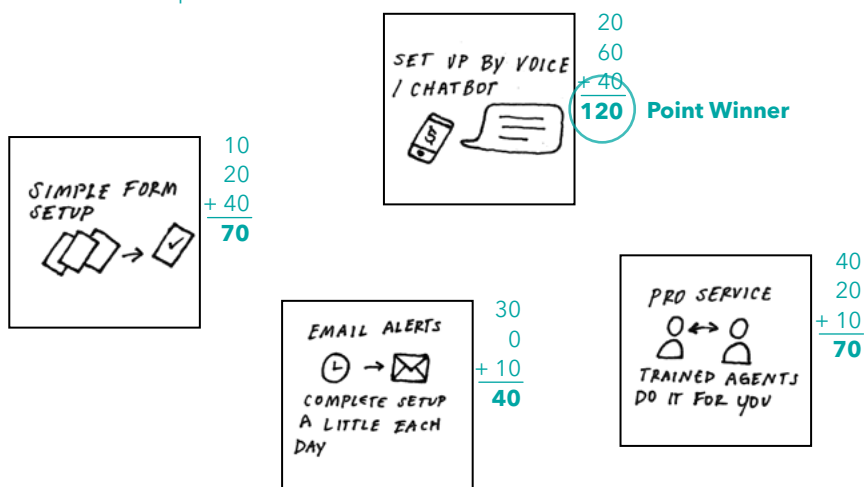
**Remove duplicates.** It's hard to allocate points if ideas are similar in concept.

**Work fast.** This method is for quick decisions, not ongoing debates. Set a short time schedule for each step and stick with it, 5 minutes is more than enough.

**Expect most ideas to garner few points.** That's the genius of the method.

**Avoid consensus.** Don't let consensus prevent you from allocating points based on your point of view.

Allocate 100 points per person across your ideas, then add the total points to determine the top idea.



## LEAP OF FAITH ASSUMPTION (LOFA)

Once you have identified a solution, the first step in the process of rapid experimentation is identifying Leap of Faith Assumptions (LOFAs). LOFAs are a subset of all the assumptions you are making about your solution, and help focus your experiments and energy on the areas of greatest risk. LOFAs should be relative to your specific solution idea, and are defined as “the assumptions that are most crucial for a product or feature to succeed” and “have not yet proven to be true in practice elsewhere”.

**How to do it:** Start by documenting all the assumptions that must be true for your idea to be successful, then prioritize these assumptions to identify your top “Leap of Faith Assumption”.

1. Brainstorm as many assumptions you can, writing one assumption on each sticky note. Consider all the assumptions that must be true for your idea to be successful, such as customer behaviors, technology, business, data, etc. It can be helpful to do this as a team.
2. Draw a 2x2 matrix on a white board, or a large piece of paper, and assign the following criteria to each axis of the 2x2.
  - Vertical Axis Criteria from top to bottom = “Crucial” to “Not Crucial” (Must be true for the success of our solution to optional to our success)
  - Horizontal Axis Criteria from right to left = “Unproven” to “Proven” (Not yet proven true in practice to proven true in practice)
3. Once you have a large list of assumptions on sticky notes, place each sticky note on your 2x2 matrix relative to each other according to the criteria above. To make things easier, consider focusing on one axis first, followed by the second axis.
4. When all assumptions have been placed on your 2x2, confirm each assumption is in the proper relative location. Your “Leap of Faith” assumption is now located in the upper right corner!

### WATCH OUT

**Be specific, not generic.** Assumptions should be specific to your solution idea, and written as a positive statement. Avoid generic statements such as “people want my solution” or “we can build it”, or “we can charge money”.

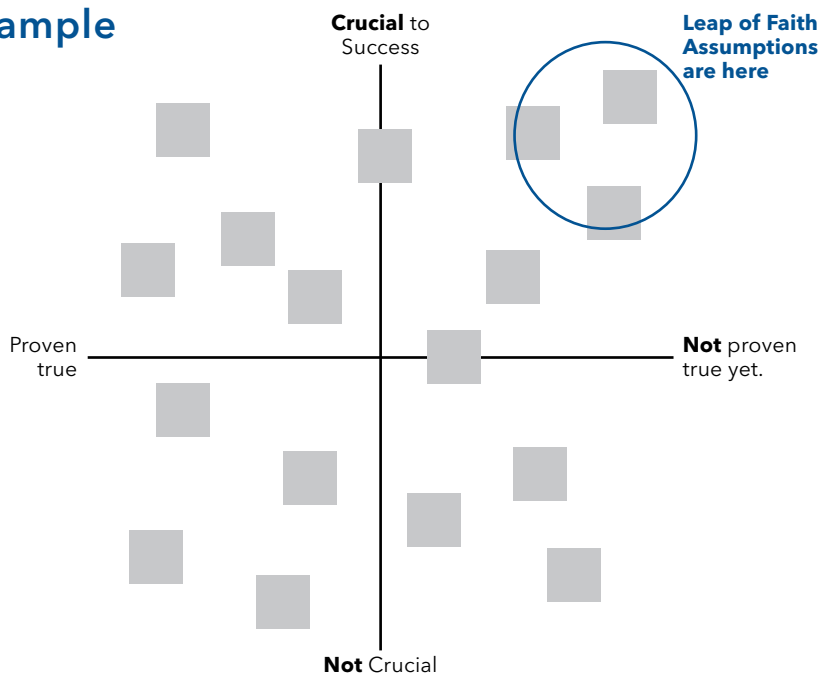
## ★ PRO TIPS

**Consider different types of assumptions.** Assumptions are often in more than one category, so be sure to highlight them as such. Assumptions most often exist as customer behavior, technology, data, or business model assumptions. Note customer behavior is often the top priority, but not always.

**Relative priority.** Once you have a long list of assumptions, prioritize the assumptions relative to one another, not in absolute terms. A bit of judgment is often required, especially for bold new ideas.

**Consider thresholds.** As your idea makes progress, consider including thresholds as your follow-up LOFAs. For example, an early stage LOFA “Customer will connect with an accountant in our app...” might evolve to become “30% of existing customers will connect with an accountant in our app...”.

## Example





# PROTOTYPING

The word “prototyping” tends to make teams think of iPhone paper templates and click-through screens in InVision, but in reality prototyping is a mindset. Prototyping is all about making our conceptual ideas tangible as quickly and cheaply as possible, so that we can get feedback and improve the idea. You can, and should prototype everything, whether it’s a sentence for your ideal state, a deck for a presentation, or an experience to test with a customer.

## When to prototype

**Stop a debate.** If you or your team find yourselves debating about which is the right path to take, building out prototypes for each path and testing them out with customers can make the choice clear.

**Communicate.** If you or a team member has an idea – show it with a prototype, rather than just telling people about it. This helps get everyone aligned and clear that they are interpreting it the same way.

**Learn fast.** If you have an idea for a change to an existing feature you can quickly learn how customer will respond, before putting more money and time into building the idea.

**Confidence in decisions.** If you or your team is not sure what to prioritize next, use prototypes as quick way to generate customer-backed data that can help you make better decisions.

**Be bold.** Explore ideas which might dramatically improve the customer benefit. The risk is low with cheap and fast prototypes, so take bigger swings.

**Get feedback early.** When developing new ideas, concepts, or event courses of action, getting feedback early can help avoid surprises later.

# Principles for effective prototyping

**Rapid.** Your goal is to learn directly from customers and iterate as fast as possible. If you prototype your ideas early and often, you'll accelerate progress.

**Rough.** You don't need high-fidelity screens to convey an idea. Usually a sharpie marker and paper work just fine. In fact, tailoring the fidelity to the situation is critical. Don't bring polished screens to a customer test or a meeting with stakeholders if you don't want feedback on button colors.

**Right.** Don't aim for completeness or perfection. Instead, aim for addressing the right question with your prototype. Resist the urge to get distracted and focus on things that are irrelevant to what you're trying to learn. By designing your prototype around the biggest question you want answered, you'll move quickly and ensure you don't get feedback on the wrong stuff.

**Build to think.** Teams often spend way too much time talking about ideas. Putting pen to paper and sketching ideas early not only helps teams get on the same page, but often makes it easier for them to build on each others' ideas.

**Build to learn.** Prototypes are crucial when it comes to learning from customers. Whether it's getting quick feedback or designing an experiment, use prototypes to test your ideas and understand how to make them better.

**Build to share.** When teams just talk about an idea, they risk everyone picturing something completely different. A prototype – even if it's as simple as a sketch on the white board – can help ensure that everyone is on the same page about the potential of an idea. Some of the best stories are told through prototypes.



## WATCH OUT

Don't wait to prototype! When you're in a meeting and see too much spinning about how to execute something, go to the whiteboard or pull out paper and a sharpie. Even better, bring a prototype to the meeting, no matter how rough.

Discussion about a tangible prototype is more productive than theoretical debates about conceptual ideas.

# RAPID EXPERIMENTATION

Rapid prototyping with customers facilitates quick learning and iterations, but experimentation helps teams assess an idea in light of true customer behavior. A good experiment helps you get past what customers say they would do and discover what they actually do.

Running experiments requires some rigor. You need to be clear about what you're testing, articulate a hypothesis, and define how you'll assess what you learned.

Teams often see experimentation as an expensive way to prototype, but it doesn't need to be. It's only expensive when you wait too long.

An experiment is just a way of gathering behavioral data to help you learn more about an idea. Sometimes that means faking it and putting out a minimum viable product (MVP) that doesn't have the back-end built yet.

## Top Five Most Common Experiment Types:

**Fast Cycle Sketch Test:** Observe testers "using" a sketch prototype

**Fake-o Test:** Part of the front-end experience, or back-end tech is fake

**Concierge Test:** Deliver the experience manually, then automate later

**Technical Test:** Prove the technology can work

**Fully Built A/B Test:** Live in production

### ⚠ WATCH OUT

**A survey is not an experiment.** Surveys have their place in D4D, just not in rapid experimentation. Experiments help close the say-do gap.

Rapid experimentation is challenging because it involves repeated zooming in and out to find your way forward. In this case, you'll want to brainstorm and narrow at each step –assumptions, hypothesis, experiments, currency.

### ↓ DOWNLOAD

Visit [D4D.intuit.com](https://D4D.intuit.com) to download worksheets and templates.

# Designing a good experiment

- 1. Identify your “Leap of Faith” assumptions (LOFAS)** – the assumptions about your idea that must be true for success and are not yet shown true in practice elsewhere. List all of the assumptions you’re making for an idea, then narrow on the riskiest assumptions using the “2x2 Method”. Select your top LOFA.
- 2. Define a hypothesis.** Without a clear hypothesis statement, you won’t know whether or not your experiment was successful. Write down your hypothesis statement using the “Describe if we, then, will...” before you run your experiment, and choose minimum success criteria(s) relevant to the type(s) of experiment you are running.
- 3. Run your experiment.** You should be able to run it quickly and cheaply. Be sure your experiment records qualitative AND quantitative results.
- 4. Assess what you learned, and then decide what to do next.** This is the most important part of the rapid experiment loop, where you decide if you should keep going, make changes, or pivot to the next solution. Compare your hypothesis to your actual success metric results, as well as any surprises and qualitative feedback or observations.

## Hypothesis Statement

**If we:** \_\_\_\_\_  
Describe how the experiment will work

**Then:** \_\_\_\_\_  
What is the outcome you expect from your experiment

**Which we will measure by:** \_\_\_\_\_  
(How you will know if it was successful)

**Success metric(s) will be:** \_\_\_\_\_  
The minimum number or percentage needed for success

# THE NEXT LOOP POSTER

The “NEXT Loop” poster helps your team create, document, and “make visible” the information associated with your rapid experiment loops. The goal is to ensure your team is being intentional with rapid experiments, as well as discussing the unique points of view on your team.

The NEXT Loop poster follows the steps of the rapid experiment loop, so you use the NEXT Loop poster in conjunction with the rapid experiment methods. By making the logic behind your experiments visible it is easier to stay focused, and easier to share your story with stakeholders, partners, and team members.

## ★ PRO TIPS

**Start with Bold Ideas.** The NEXT tool should be used after you have identified a bold solution idea you wish to test.

**Be Precise and Concise.** As you capture the details of your experiments, do so with precision and clarity. Include exact numbers for your metrics, specific dates when experiments begin and end, and specifics about the most important aspects of the experiments.

**Tell a Story.** The NEXT poster is a guide for telling the story behind your idea. Each step should align with the previous step, so there is a logical path anyone can follow

**Be Data Driven.** When making your decisions after the experiment is complete, be sure to use actual data from the experiment to do so. Use both qualitative and quantitative data, and share your logic as a team.

## ⚠ WATCH OUT

Don't use the NEXT loop if you cannot yet describe a narrow customer problem, ideal state, and your specific solution idea. Avoid using it with conceptual ideas, or high level experiments which do not align directly with your customer problem statement. Surveys are NOT experiments!

# How to use the NEXT poster

Post a physical version of the NEXT poster in a visible location, such as a wall in your team neighborhood, a hallway, or a white board. Follow the steps listed on the poster by placing sticky notes in the appropriate boxes as you go.

**Top Row:** Start with your customer problem statement, ideal state, and proposed solution idea you will test with customers. Be concise and precise.

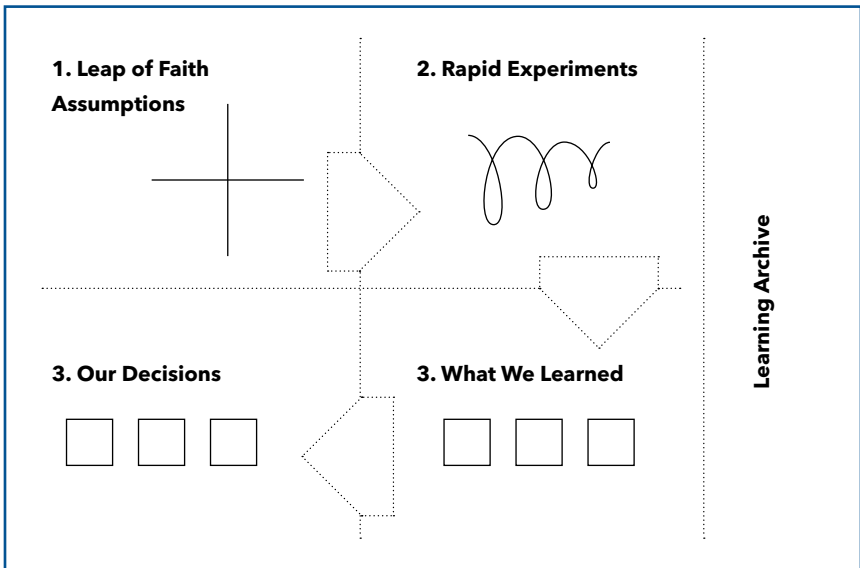
**Box 1:** Identify your Leap of Faith assumptions

**Box 2:** Brainstorm rapid experiments your might run, and write a hypothesis

**Box 3:** Capture qualitative and quantitative data as the experiment is running

**Box 4:** Focus on what actually happened, then decide what to do next.

**Archive:** As you complete each "loop", move your sticky notes to the "Learning Archive" columns, then repeat the process starting at the top row.



## IMPROV: 3 THINGS

**Why:** To demonstrate the value of divergent ideas and/or supporting others' ideas.

**When:** When energy levels are down or when teams need help with brainstorming and building off of each others' ideas before brainstorming.

### How to do it:

1. Participants gather in a circle with play going clockwise (though it isn't to say that the game would crumble if play proceeded counterclockwise.)
2. One participant is chosen to begin, and they do so by turning to their left and asking the person to name "Three things..." that are in the same category or possess a similar trait (for example, "Three things that are blue").
3. The participant who received the command must then name three things that fit within the guidelines as quickly as possible (for example, "the sky, suede shoes, jeans").
4. Once the participant is able to list three items, the entire group celebrates with a quick chant of "Three things!"
5. The participant then turns to their left and provides another category, and the process repeats until the facilitator feels that enough time has elapsed.

## Debrief

After the activity is complete, share with participants why they did the improv activity. Select the reason below that corresponds to your reason and explain it to participants:

**Going broad.** Because you are told to go quickly, it's effective in turning off your internal filters and allowing you to give out ideas and thoughts that you might have otherwise guarded.

**Deferring judgment.** Given the speed of the activity, you aren't able to react and to judge; instead you are focused on how quickly the three items can be named so that everyone can chant "Three things" and proceed.

**Supporting others.** Everyone cheers enthusiastically when you list the three items not only validating what you said but also creating a safe environment that better fosters diverse ideas.

### PRO TIPS

Give a few examples of "three things" categories that are different from one another:

"Three things that you eat for breakfast"

"Three people you wish to meet before you die"

"Three things you can say to a cop to get out of a speeding ticket"

Emphasize speed over correctness; the goal is to go around the circle as quickly and with the most energy as possible, not to have the "best" answers for everything.



## IMPROV: I AM A TREE

**Why:** To demonstrate the value of building on prior ideas and/or supporting others' ideas.

**When:** Before brainstorming as an Ice Breaker.

**How to do it:**

1. Participants gather in a circle with play going clockwise (though it isn't to say that the game would crumble if play proceeded counterclockwise.)
2. One person steps out into the middle of the circle, places out their arms as if they were a tree, and says, "I am a tree."
3. Another person steps into the middle and adds something to the tree and states it to the group (e.g. "I am a nest on a branch").
4. Finally, another person steps into the middle and adds one more item to the scene. After the second person has added to the scene, the three people have completed the scene.
5. The person that started the scene (i.e., the tree) chooses one of the two others to leave the circle with them.
6. For the other person that's left in the middle, they repeat what they are, and the process repeats with another two people adding to the new scene.

**Note:** It's nice to end the game when the last person to add to a three-person scene is a tree (bringing everything full circle), but it's not required.

## Debrief

After the activity is complete, share with participants why they did the improv activity. Select the reason below that corresponds to your reason and explain it to participants:

**Building on ideas.** This activity is all about seeing what's in front of you and finding ways to add to it. With brainstorming, we should have the mindset that ideas are additive and look for ways to build upon them.

**Supporting others.** When the first person is alone in the center of the circle, it can be lonely and intimidating; however, with two other people rushing in to join and help out, it helps to develop a sense of trust, support and teamwork among your fellow participants over time. With brainstorming, people feel comfortable and open to contributing ideas when they know that they are going to be supported by the group.

### PRO TIPS

Remind people to repeat what they are so that people can quickly come up with ideas and join them.

Don't let someone stay in the middle by themselves. Tell people to support each other by not letting anyone stand alone.

If people are going too crazy and not listening to others' ideas, stress that they should be paying attention and listening to what their team members are saying, and trying to guess what they want.