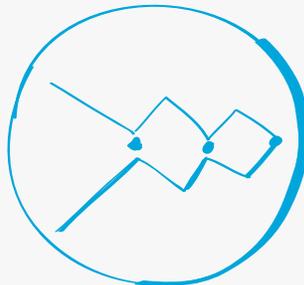


# Catalyst

DEEP CUSTOMER  
EMPATHY



GO BROAD TO  
GO NARROW



RAPID EXPERIMENTS  
WITH CUSTOMERS



An Intuit Innovation Experience  
January 29th, 2013

## WELCOME

Welcome to Catalyst, a day-long immersion in Intuit's innovation culture. Catalyst will not be your standard conference. The PowerPoint will be minimal. Instead, you will take part in exercises where you will actively use innovation techniques and learn by doing. Working with our Innovation Catalysts, you will practice building deep customer empathy, quickly running experiments, and applying our Design for Delight principles to solve business problems.

## WHAT TO EXPECT

Today is a day where we will be learning new ways of approaching old problems. It is a day of learning how to be comfortable with being uncomfortable and all the great insights that can come from failing fast. Most importantly, it is a day for learning practical innovation tools that will evoke change and creativity. We are glad you are here and look forward to spending a rewarding day together.

## A FEW GROUND RULES

1. Everyone is a designer.
2. Be open to new possibilities.
3. Be present.
4. Everyone has an equal voice.
5. Work as a team.
6. Share what you learn. #innovationcatalyst | @Intuitinc

## A message from Brad Smith, President and CEO

Welcome to Catalyst!



You are part of a select group invited to participate in this inaugural event. We are excited you are here and excited to share our approach to innovation with you, our partners and friends.

Today, we are living in a world where the pace of change is not evolutionary, but revolutionary. As the world becomes more global and more connected, new models and methods are reshaping the way we do business across industries and cultures.

This new landscape presents all of us with both great opportunities and great challenges.

Many of the most innovative companies are transitioning to an experiment driven culture, where it is not the opinion of the highest paid person in the room that drives key decisions, but the data derived from experiments. In this new data-driven world, the role of leader is changing. No matter what you do or where you do it, strong innovation skills are a critical part of the modern workplace.

At Intuit, we have experienced this first hand. The tools and techniques you will learn today have helped turbocharge our own innovation culture, inspire our employees and ultimately delight our customers.

Our hope is that when you leave today, you will be armed and inspired with a new set of skills to lead innovation in your own organizations. So roll up your sleeves and enjoy your day innovating at Intuit!

Brad

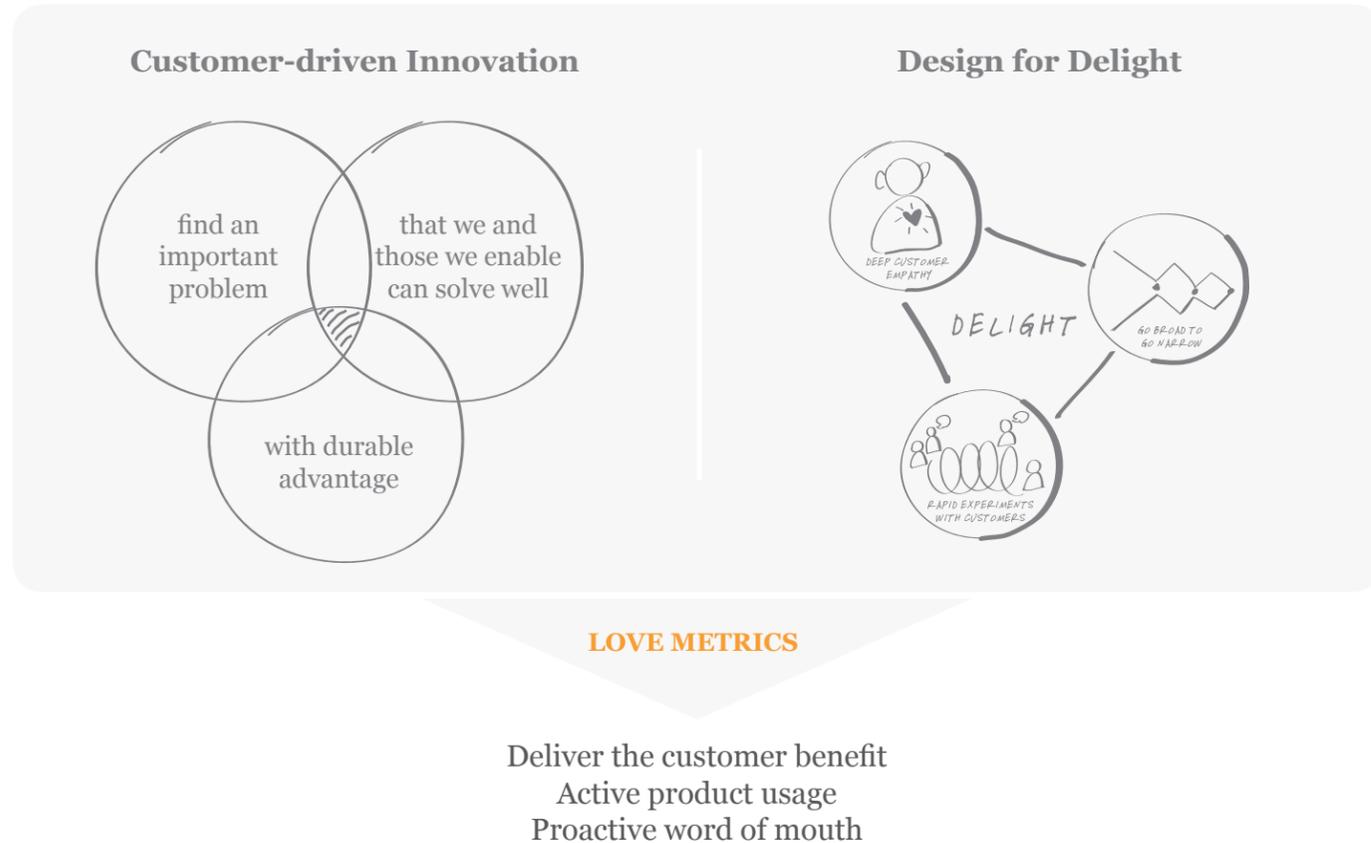
## AGENDA

- 0930 Welcome & Leadership in an Agile Age (*Scott Cook*)
- 0950 Design for Delight: part 1 (*Lionel Mohri and Innovation Catalysts*)
- 1145 Lunch
- 1230 Design for Delight: part 2 (*Lionel Mohri and Innovation Catalysts*)
- 0145 Reflections (*Scott Cook and Lionel Mohri*)
- 0220 Break
- 0230 Intuit Innovation Case Studies (*Kaaren Hanson & Suzanne Pellican*)
- 0300 Fireside Chat (*Brad Smith*)
- 0400 Innovation Gallery Walk

# INNOVATION at INTUIT.

## INNOVATION AT INTUIT

Intuit applies two core capabilities to delight customers...



Innovation at Intuit is systematic. Yet, we afford our employees the autonomy to tap into their own passions to delight customers and grow the company. Innovation at Intuit is the intersection of customer, technology and business insights. We encourage our employees to know our customers - watch them, listen to them, visit their homes and workplaces - so they can discover and solve important customer problems. Our secret sauce for innovation is Design for Delight (D4D), our way of looking at design thinking.

Intuit has mechanisms in place to grow & reward our innovators...

### UNSTRUCTURED TIME

... 10% time to pursue your ideas

### INNOVATION AWARDS

... 3 months time for top innovators

### BRAINSTORM

...digital platform connecting people to help ideas grow

### IDEA JAMS

...sessions dedicated to move ideas forward

### INNOVATION CATALYSTS

...a community of 200 driving Design for Delight in the DNA

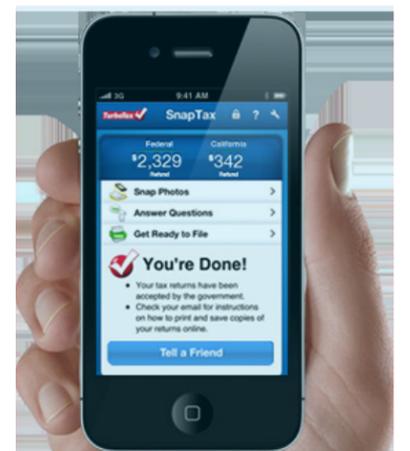
### RAPID EXPERIMENTS, LEAN START-INS

...test our hypotheses with customers "in the wild"

#### EXAMPLE

Consider the success of SnapTax. It's an app that people use to prepare and file simple tax returns on their iPhone in a matter of seconds.

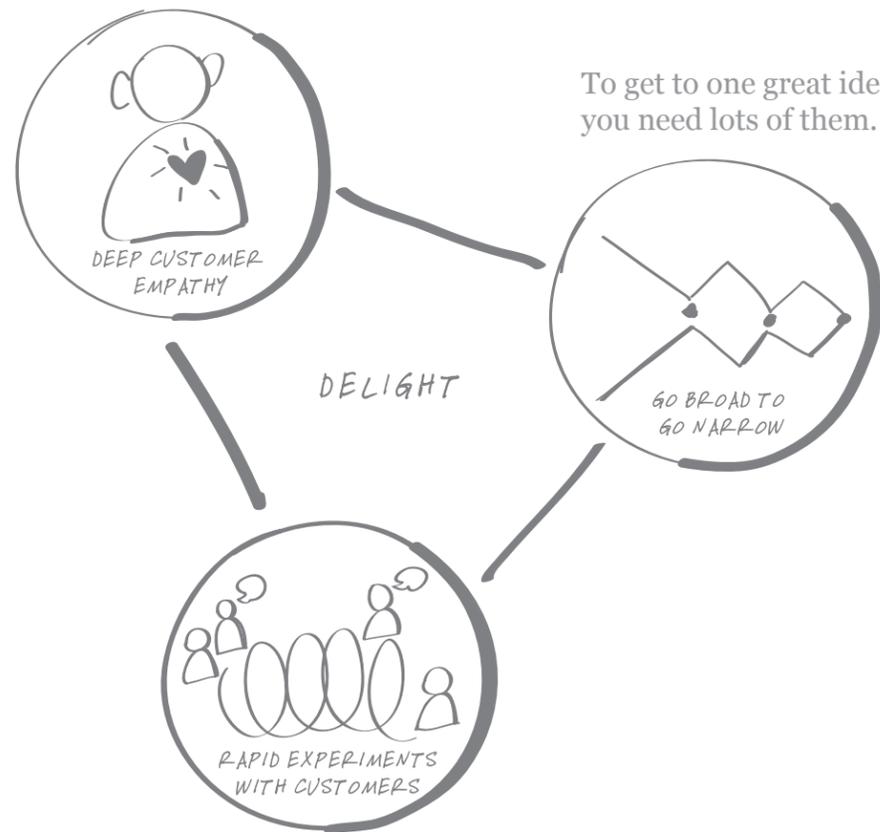
First conceptualized by a small team using their 10% unstructured time, SnapTax has become one of our most interesting new offerings.



# DESIGN FOR DELIGHT

Design for Delight is ultimately about evoking positive emotion throughout the customer journey by **going beyond customer expectations** in delivering awesome product experiences that people want to tell the world about.

Knowing your customer better than they know themselves.



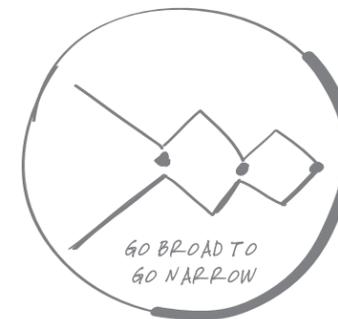
To get to one great idea, you need lots of them.

You can never learn too early or too often from customers.

Today, you will get a chance to **put these principles into practice**, and we are also including a few methods in this notebook in case you want to try them out on your own projects.



Method 1: Customer Safari  
Method 2: Empathy Map



Method 3: Brainstorming  
Method 4: 2x2



Method 5: Storyboarding  
Method 6: NEXT tool

**NOTES & DOODLES**



**NOTES & DOODLES**



**NOTES & DOODLES**



**NOTES & DOODLES**





# TOOLS & METHODS

# DEEP CUSTOMER EMPATHY



## CUSTOMER SAFARI

### WHEN TO USE IT

You want to get deep customer empathy and insights on the experiences of existing customers, new or prospective customers, or early-adopters who may help you understand longer-term opportunities.

### HOW TO USE IT

1. **VISIT** the location where your customer is
2. **OBSERVE** the activities in their environment
3. **CAPTURE** a list of:

*WHO are the people you observe?*

*WHAT are they trying to do?*

*WHAT are the barriers or problems they encounter?*

*WHERE is the problem occurring?*

*WHEN does the problem occur?*

*WHY is it occurring?*

*HOW do they deal with it?*

### WHY USE IT

- To identify the artifacts and environmental factors that influence your customer.
- To understand the current solutions in context.
- To identify opportunities for improving or changing the experience.
- To find new opportunities for disruptive innovation.

### TIME

60 to 120+ minutes

### TIPS

- Take photos of the environment, the customer, and the problem, so you can review them later and share them with others on your team.
- Identify as many possible problems as you can.
- Don't stop with one WHY. Try to get to the root cause.
- Once you have identified problems worth investigating in more detail, consider conducting in-person interviews.



## EMPATHY MAP

### WHEN TO USE IT

You have research findings and want the team to understand what they mean at a deeper level.

### HOW TO USE IT

1. **PLAN** Set out Sharpies and Post-Its.
2. **UNPACK FIELD RESEARCH** What was surprising? Individually, write down your top three observations. Then as a group, share each customer's story out loud, one at a time. Take notes on Post-Its, capturing observations, quotes, and inferences.
3. **WALK THE MAP** Stick Post-Its in the appropriate areas, starting with the explicit (say/do), and then to the implicit (feel/think) for each observation. What did this person:
  - Say?** (quotes and keywords)
  - Do?** (actions and behaviors)
  - Feel?** (infer emotions using words/facial expression)
  - Think?** (infer beliefs, logic – if I do this, then...)
4. **IDENTIFY CONTRADICTIONS** Where did this person say one thing and do another? What motivation, belief, or unarticulated need resolves these truths?
5. **STEP BACK** Look for patterns across customers.
6. **CLUSTER & IDENTIFY** Group related observations and insights. Note the ahas and insights for further exploration.

### WHY USE IT

- To sink into a customer's perspective and related emotions.
- To uncover underlying motivations and beliefs that drive behaviors and words. Feelings are key to delivering delight.

### TIME

20 to 30 minutes per customer

### TIPS

- Using a unique Post-It color for each customer will make it easier to identify patterns across customers, and help to identify duplicate notes.
- Expressing needs as verbs helps to ensure a focus on the problem to solve rather than the solution to address it.



## GO BROAD TO GO NARROW



### BRAINSTORMING

#### WHEN TO USE IT

You want to quickly generate a bunch of ideas from a variety of perspectives.

#### HOW TO USE IT

1. **SET CONTEXT** by grounding participants in the problem or opportunity space, project history, personas and insights.
2. **WARM UP** with group exercise to get energy up.
3. **FOCUS ATTENTION** by writing a provocative question on the board (How might we...? or What ways can...?).
4. **QUIET IDEATION** to balance different thinking styles, spend two to three minutes capturing ideas individually, one idea per Post-It. Use Sharpies.
5. **ENGAGE EACH PARTICIPANT** by asking them to share an idea.
6. **REINFORCE** the idea by repeating and clarifying it, and then sticking it on the board.
7. **BROADEN** When ideation slows, build on ideas (see Tips).
8. **CLUSTER** ideas into themes.
9. **NARROW** the idea set by polling or voting.
10. **HIGHLIGHT** the winning ideas and discuss next steps.

#### WHY USE IT

- To quickly generate many new ideas.
- Incorporate diverse perspectives.
- Probe more deeply into a problem or opportunity area.

#### TIME

30 to 45 minutes

#### TIPS

- Brainstorms are only successful when their results are put into action. An effective brainstorm should net 50 to 100 ideas. If you have more than eight participants, break them into groups of five or six. That will generate even more ideas and generate a higher level of engagement. To generate even more ideas when the stream has slowed to a trickle, try one or more of the following:
- Add or remove constraints. For example, ask “What if we had a million dollars?” Follow that with “What if we had \$5 dollars?”
  - Use analogies and metaphors. Ask “What else is like...?” “What qualities are important?”
  - Use opposites to spark energy and uncover unarticulated needs or desires. “What’s the opposite of ...?”



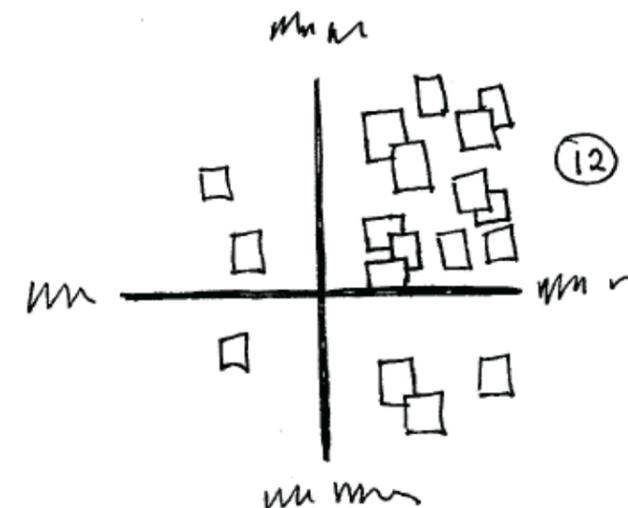
### 2x2 NARROWING

#### WHEN TO USE IT

You have a number of ideas and need to evaluate them to narrow your focus.

#### HOW TO USE IT

1. **EXPERIMENT** with word pairs for axis labels. It often takes a few iterations to arrive at useful labels for analyzing ideas.
2. **PLACE** idea Post-Its in the appropriate quadrants. You should have Post-Its in all quadrants. If you find they are all clustered in one quadrant, brainstorm another axis label.
3. **PHOTOGRAPH** the populated 2x2 and the related notes.
4. **ITERATE** Develop multiple versions of 2x2s to uncover additional insights and refine your point of view on which ideas to explore first.



#### WHY USE IT

Explore relationships and tensions between two goals, values, motivations, or other characteristics. Prioritize your ideas using criteria important to you and your customers.

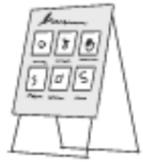
#### TIME

About 15 minutes per round

#### TIPS

- Make sure the best outcome is located in the upper-right quadrant of the 2x2.
- If you find Post-Its are crammed together in the upper-right quadrant, draw another 2x2 with the same axes. Then re-evaluate the Post-Its from the upper-right quadrant of the previous diagram, comparing ideas to others in the same quadrant.
- Enlist one group member as note taker. Using a whiteboard or easel pad, take notes on the discussion between team members as they place the ideas. The decision criteria that emerge are often more valuable than the actual position of the Post-Its.

## RAPID EXPERIMENTS WITH CUSTOMERS



### STORYBOARDING

#### WHEN TO USE IT

When you have an idea and want feedback on how well it solves the customer problem, meets the customer's criteria, or delivers a big customer benefit.

#### HOW TO USE IT

1. **SELECT** an idea or problem to storyboard.
2. **DETERMINE** what you want to learn: Ask the team, "What would be good about this solution?" Be very specific – "make it easy" is too broad. Narrow to the top 2-3 reasons. This is the hypothesis that you'll test for this idea.
3. **CREATE A SCRIPT** Place a Post-It in each cell. Write the customer benefit in the last cell. Describe the customer problem in the first 1-2 cells. Use the cells in-between to show how the story unfolds (your solution).
4. **REPLACE** each Post-It with a sketch of a key scene of the story.
5. **PILOT** your storyboard. Have someone who doesn't know the story read it aloud and tell you what's confusing. Revise.
6. **GET CUSTOMER FEEDBACK** Have the customer tell you what is happening in each cell. Then get their reaction to the problem, idea, and the benefit.

#### WHY USE IT

Enables your team to iterate quickly on new concepts before spending time designing or building high-fidelity mock-ups. Storyboards can also be used to gain deeper insight into the customer's experience.

#### TIME

60 minutes per iteration, including customer feedback.

#### TIPS

Participants who do not draw often will want to use words in each cell to describe what is going on. To get better feedback, try to use words very sparingly, only when necessary.



### NEXT TOOL

#### WHEN TO USE IT

- You have a clear customer-backed vision.
- You want to experiment with different ideas that ladder up to an established vision.

#### HOW TO USE IT

1. **OUR INSIGHTS** What is the big unmet problem? What was the compelling a-ha that is driving your vision?
2. **OUR VISION** Inspire your team with a grand challenge. Focus on the customer and ensure solutions are not included in the vision.
3. **OUR IDEA** Make it tangible and specific, while highlighting the customer.
4. **LEAP OF FAITH ASSUMPTION** Focus on the customer behaviors that must take place, and the most "unknown" assumptions.
5. **OUR HYPOTHESES** Ensure alignment with your Leap of Faith. Choose numeric targets that inspire your team, and behaviors that are measurable.

6. **OUR EXPERIMENTS** Test important behaviors that align with your hypothesis. Collect "currency" from customers as a way to measure real interest, and encourage teams to be open to surprises as well as collect metrics. Make sure the experiment will test your Leap of Faith.

7. **OUR DECISION** A team's default decision is often to persevere, so push teams to make a strong case if that's the way they decide to go.

#### WHY USE IT

- To be more intentional about how you set up rapid experiments with customers.
- To make more informed decisions, such as based on how people actually behave in the real world.

#### TIME

Iterative process.

#### TIPS

- Embrace failure. Seek surprises and new insights.
- Run experiments, don't debate.
- Make sure that your team is aligned on the customer behaviors you are trying to test, and why.

## LEADING IN THE INNOVATION AGE

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### Scott Cook

Principles for Leadership in the Innovation Age

#### PRINCIPLE 1

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**Leaders champion a grand challenge.** Challenge your organization with the problem, not your solution. Grand challenges are ambitious, tangible and memorable, solution-free and focused on your customer (not on yourself).

#### PRINCIPLE 2

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**Leaders install the systems and culture to enable experimentation.** Remove speed bumps in experimenters' way. Make experimentation easy for everyone in your organization. Ask yourself: What slows my newest employees from testing their best ideas to ace my grand challenge? How much lower can we drive the cost of experiments and the time it takes to get around the lean experiment loop?

#### PRINCIPLE 3

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**Leaders pull insights from successes and failures.** The real goal of experimentation is to gain insights used to create business success. Savor the surprises from tests, both positive and negative. Recognize and reward those who pull insights from experiments

#### PRINCIPLE 4

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**Leaders live by the same rules themselves.** Your own ideas have a leap of faith assumption, how can you test them fast and cheap? Recognize your idea is just one idea. Can your team find and test even better ideas?



Learn More About Innovation at Intuit  
<http://bit.ly/IntuitCatalyst>

