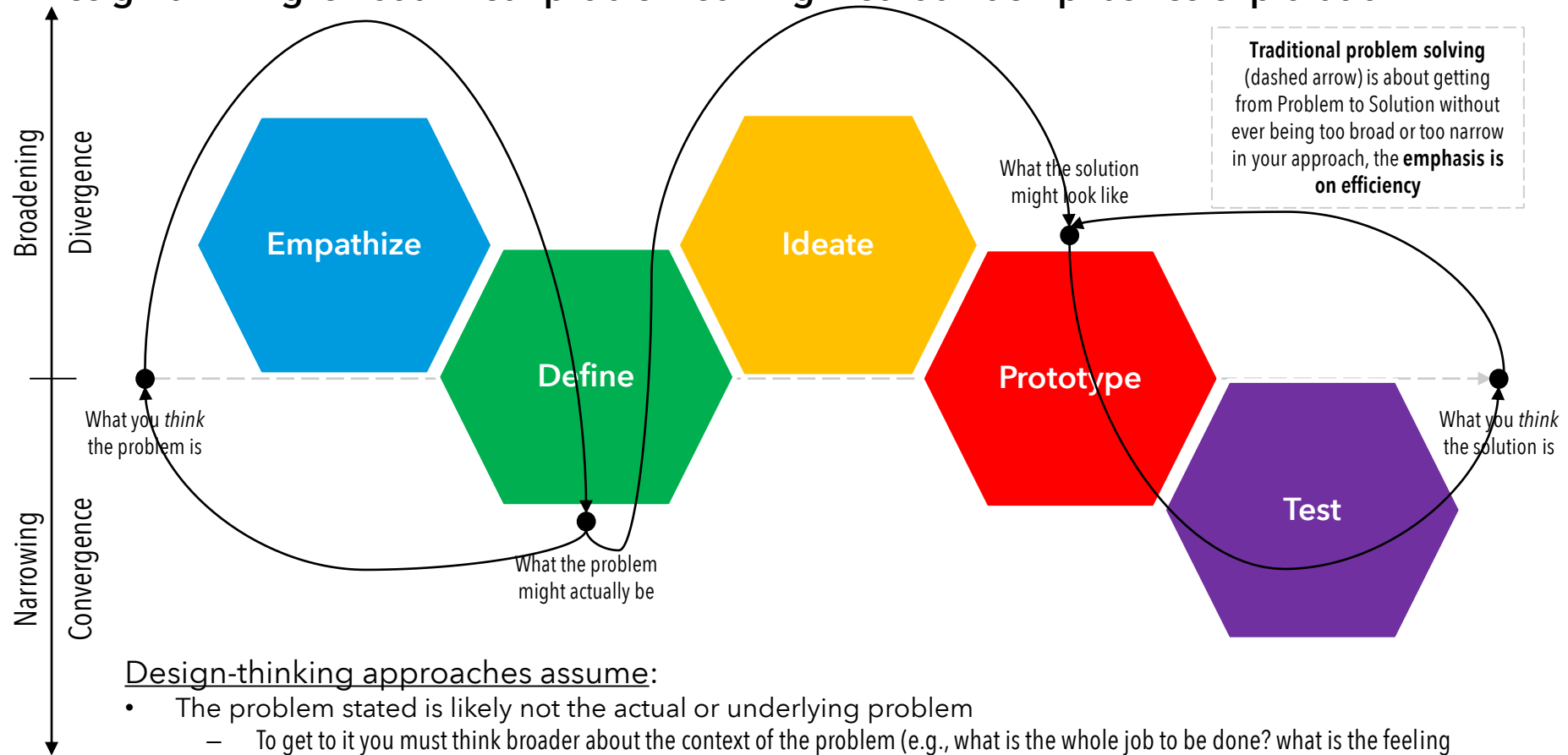# CAPITAL GROUP℠

Innovation for METS

Applying Design-Thinking Methods

Innovation is not an event. It is a (design) process:

Design-thinking is not a linear problem solving method. It emphasizes exploration.

Broadening / Divergence

Narrowing / Convergence

Empathize

Define

Ideate

Prototype

Test

What you *think* the problem is

What the problem might actually be

What the solution might look like

What you *think* the solution is

Traditional problem solving (dashed arrow) is about getting from Problem to Solution without ever being too broad or too narrow in your approach, the **emphasis is on efficiency**

Design-thinking approaches assume:
- The problem stated is likely not the actual or underlying problem
  - To get to it you must think broader about the context of the problem (e.g., what is the whole job to be done? what is the feeling we want to produce?)
- Solving for a specific person or narrow group of people creates a better, more resonant solution
  - Resonance with the consumer gives the solution a higher chance of success and wider applicability
- One must suspend criticism and embrace the outlandish to conceive of solutions that are truly innovative
- The best way to develop an idea is to create the simplest possible prototype to test
  - Getting reactions to something in the hands of the consumer is more valuable than getting thoughts on something theoretical
  - Rapid iteration in response to consumer feedback is critical to refining the solution

Empathy is about connecting with the user/consumer you are trying to solve for, taking on their mental state

The tools of empathy are interviews and observations

Do a guided interview exercise with specific audiences

<u>Interview Tips</u>

- Have a dedicated note-taker capturing direct quotes
- Get deeper: ask why 5 times, get to their true emotions/values
- Drive to specificity (e.g. "Tell me about the last time you _")
- Note nonverbal cues, then follow up (e.g. "Why'd you smile?")
- Ask questions neutrally, without suggesting answers
- Avoid binary questions
- Don't jump in with questions, force them to fill silences
- Try to note which of their interests are dominant
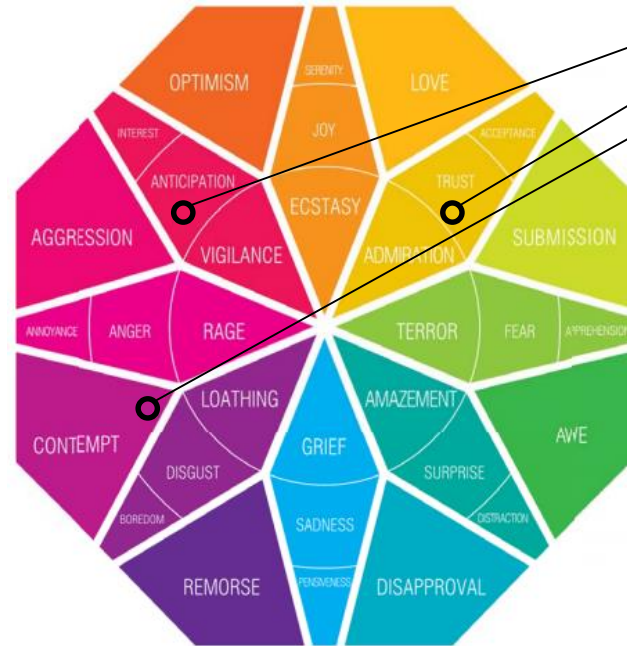
Aggregate quotes and non-verbal evidence into **emotional clusters** to **identify** how all of the audiences are **feeling about the process, task, or other groups involved**.

Some additional approaches:

Picture What/How/Why	Analogous Consumers	Journey Map
1) Take photos of a consumer as they perform a task	1) Identify a specific sub-task to evaluate (e.g. interacting with an admin or middleman)	1) Ask a consumer to document each step taken to complete a task (e.g., planning a multi-city, multi-company visit trip)
2) In concrete terms, state *what* they are doing (e.g. listening to a call with a planner)	2) Find another place where this sub-task happens (e.g. moderated qualitative research studies)	2) Highlight steps that seem intuitively unrelated (e.g., closing their door) or obvious (e.g. opening concur, meeting with their admin to discuss). Ask why these steps were included despite being unrelated or obvious.
3) Describe them and *how* they are doing it. (e.g. hunched over, checking email)	3) Observe success and failure at the sub-task in that new place	
4) Guess *why* they are doing it this way (e.g. it doesn't seem productive to them, they don't want to add anything to the conversation)	4) Interview the people performing that task in the analogous context	

Empathize

Two steps to defining the solution space: stating the insight, forming a point of view

Step One: Stating the Insight

The Leap → The Insight

Clustering observations, needs, emotions, tensions, contradictions, and surprises…

… forces you to wonder why all of these things are happening. What might it mean?

The insight is a provocative explanation that maintains the tension.

What you *think* the problem is

How can we change the structure of METS planner role to add value for our Investment Group partners?*
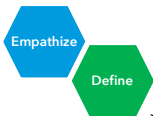
- The IG and other business partners do not know or care to know what the METS team is as distinct from broader OS or Meeting Planning
- METS employees want to work directly with analysts and PMs, but analysts and PMs don't want to have to think about this at all, would rather just interact with their admin or have planning be invisible
- METS employees are eager to meet customer needs, but become disheartened or resentful when the needs upend the plan
- The METS team does not feel like they are "adding value" when writing up an itinerary, but that is the part the IG values most.
- The METS team wants to interact directly with IG professionals, but end up taking orders from admins

…METS planners want to have a comprehensive understanding of IG needs before planning an event, but IG professionals can't be bothered to devote time to it and view it all as just "administrative work"

Step Two: Forming a Point of View

The Specific User(s) + The Insight = The Solution Space

A statement consisting of your specific user and your insight constitutes your **point of view** on what the problem might actually be.
USER needs to [VERB STATEMENT] because [INSIGHT]

The solution space is full of narrower "How might we" statements that contain all possible solutions

A METS planner needs to feel like an equally valued partner when planning meetings for the Investment Group because his job is not just "administrative work."

How might we get IG admins to collaborate with METS planners in meeting underlying IG needs?

What the problem might actually be

Why/How Ladder
For help making the leap
1) Begin at a need, emotion, etc.
2) Ladder down by asking how it's manifesting to create downward branches
3) Ladder up from the branches by asking why it's happening this way, continue moving up each branch 5 times/whys
4) Find the most provocative branch at the top

POV Want Ad
For help forming a POV
[DESCRIPTIVE CHARACTERIZATION OF A USER] seeks [AMBIGUOUS METHOD OF MEETING AN IMPLIED NEED] + [ADDITIONAL FLAVOR]

e.g. "undervalued METS planner seeks partner for planning perfectly executed meetings. Only collaborative, deep-thinkers need apply."

Empathize / Define

*Note: "add value" is not specific enough to be solvable. I'd emphasize getting to a more specific goal or emotion. I have specified the investment group as an example.

At the outset, ideation requires a suspension of all criticism, an elimination of any feasibility analysis… those come later

Step One: Brainstorm

Brainstorming is done in response to a variety of How Might We statements. The emphasis is on quantity. General guidance:

- One idea/how-might-we statement/conversation at a time

- Make individual ideas short/sweet, add by saying "Yes, and"

- Build on the ideas of others before proposing new ones

- Encourage outrageous, controversial, fanciful ideas

- Be visual: add post-its in clusters, draw it out

- Defer judgment and criticism

- Use the space: find a dedicated room will lots of walls/ space to stand and move around

- When energy/volume of ideas is low, pivot or add constraints

  - Constraints are like a finger on the hose, increasing pressure/speed without affecting flow volume

  - "all ideas must challenge authority," "must involve multiple people," "must incorporate magic"

> **"How Might We"**
> *For help making coming up with the "HMW?'*
> - HMW amp up the good parts of the POV (e.g. make METS planners more important?)
> - HMW remove the bad parts of the POV (e.g. make METS work less administrative?)
> - HMW question an assumption (e.g. eliminate METS planner roles?)
> - HMW change adjectives (e.g. make independent work collaborative?)
> - HMW add unexpected resources (e.g. make use of Travel?)
> - HMW explore an analogy (e.g. make METS more like Jarvis from Ironman?)
> - HMW explore the opposite of where we think this is going (e.g. make invisibility fun?)
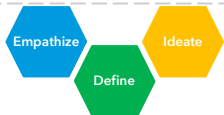
Step Two: Select

Choose multiple ideas to prototype using a preferred method (examples below):

> **Personal Top 3**
> - Each participant votes for their top 3 ideas
> - Closed ballot

> **Vote by Category**
> - Each participant votes for their top idea on 3 metrics:
>   - Easiest to accomplish
>   - Most likely to delight the user
>   - The most game-changing
> - Open ballot

> **Vote by Solution-Type**
> - Each participant votes for their top idea by solution type:
>   - Physical
>   - Digital
>   - Theoretical (e.g., a process)
> - Open ballot

> **Pitch**
> - Each participant pitches their top choice to the group
> - Leave room for clarifying/exploratory questions, discussion
> - Open ballot

Especially if prototyping more than one idea, the group should split into smaller teams before moving on to the next phase. Make sure each team has consensus and a common understanding of the solution they will prototype.

Empathize Define Ideate

Prototyping/testing is an iterative process that demands iteration and incremental change with low-fidelity materials

Build as little as is required to get a feel for the solution. Test. Repeat.

- Your solution will always be imperfect, refining at low-fidelity is cheaper than waiting/perfecting the look/functionality
- Mistakes cost more to correct the longer you've been building on top of them. Test early, and test often
- Spending too much time on a version of the solution makes you too committed to it, others less likely to be honest about it because it's too perfect
- Testing is really an exercise in user empathy to discover/define problems with your prototype, then ideate on solutions before building the next version of the prototype

Let users help build it/direct its construction

Suppose that our hypothesis is that each IG research group needs 1-2 METS planners on their local floor

- Assemble a small team of potential customers (analysts/admins) in an empty room.
- Have cheap supplies on-hand:
    - Cardboard, Styrofoam, Aluminum Foil
    - Paper, Markers, Pens, Pencils
1) Give the them a theoretical task (e.g., "plan a last minute company visit lead by one analyst for three other analysts/PMs")
2) Ask them to name what they would need to accomplish this task. With them, draw out the tools/furniture, build three dimensional versions, fill the room. If it's digital then draw out all the screens.
3) Once they have the tools they named, run through it as a story. Ask them to say/act out step by step together.
4) Capture their responses, ask questions, build additional tools/improvements as necessary

Capture feedback across 4 categories

$+$ notable bits, likes	Δ wishes, criticisms
? confusing bits, questions raised	!! new ideas

Testing Tips

- Testing should always be centered on the user actually using/experiencing the prototype with as little explanation as necessary
- Try asking them to narrate what they are feeling, doing/trying to do aloud
- Observe use/misuse, then ask (e.g., "why did you _?"), don't clarify
- If they ask what something is/does, first turn the question (e.g. "what do you think it is/does?"), capture the response, then clarify
- Identify a single element/variable in the prototype you want to test one round, and focus on that almost exclusively
- Focus on testing the experience first, not functionality (think Wizard of Oz)
- Add fidelity slowly (e.g., paper→powerpoint→invision→wix→adobe web)
- Never pitch the solution to the user or sell its features
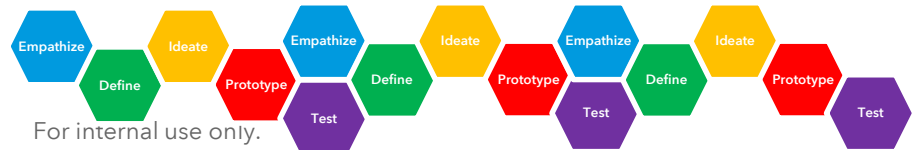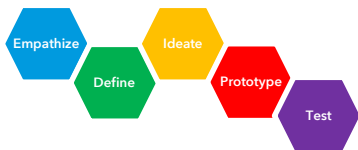
While much work has been done, there are gaps in the approach. The Innovation team is prepared to help

Let's talk about how we can assist your group whether just for a few workshops or a more structured engagement

- We bring expertise in innovation methodologies and experience in pushing forward bold concepts at Capital Group

- We can collaborate to develop a timeline and tasks to accommodate your group, including:

    - Empathy interviews to get at the true problem(s) among planners, analysts, PMs, admins etc.

    - Definition exercises to narrow to a specific solution set

    - Ideation sessions to create and identify truly out-of-the-box solutions

    - Prototyping and testing to refine ideas, get experience with how they will work

The process can be scaled up or down, but at ~4 hours/day, five weeks will be sufficient to learn the methods by doing

The Innovation team can provide coaching through a short sprint, which you can then replicate on your own for future problems

Day	Stage	Deliverables	Coaching Touchpoints	Time w/ Coach	METS-Only Time
1	⬡	Interview guides by audience	Process overview, interview training	4 hours	N/A
2	⬡	Empathy probes/emotional clusters	N/A		4 hours
3	⬡	Potential insights	Workshop on forming an insight	1 hour	3 hours
4	⬡	Empathy probes/emotional clusters			
5	⬡	Potential insights	N/A		12 hours
6	⬡	Empathy probes/emotional clusters			
7	⬡	The insight/POV	Workshop on constructing the POV	1 hour	3 hours
8	⬡	The solution space/potential solutions	Ideation workshop, voting guidelines	2 hours	2 hours
9	⬡	Potential solution(s)	N/A		4 hours
10	⬡	Prototype(s)	Workshop on prototyping, testing training	1 hour	3 hours
11	⬡	Feedback on prototype(s)			
12	⬡	Prototype(s)			
13	⬡	Feedback on prototype(s)	N/A		20 hours
14	⬡	Prototype			
15	⬡	Feedback on prototype			
16	⬡	Prototype	Check-in on prototype, next steps	1 hour	3 hours
17	⬡	Final prototype	N/A		4 hours
18	⬡	High-level biz case, competitor analysis, current state assessment	Review work plan	30 minutes	3.5 hours
19	⬡	Presentation draft	Review draft	30 minutes	3.5 hours
20	⬡	Refined biz case, competitor analysis, current state assessment	N/A		4 hours
21	⬡	Presentation draft	Review draft	30 minutes	3.5 hours
22	⬡	Refined biz case, competitor analysis, current state assessment	N/A		4 hours
23	⬡	Presentation draft	Review draft	30 minutes	3.5 hours
24	⬡	Refined biz case, competitor analysis, current state assessment	N/A		4 hours
25	⬡	Final presentation	Review final presentation	1 hour	3 hours