Concept Building Toolkit

A Guide to Building Effective, Sustainable, Evidence-Based Learning Resources

humanitarian leadership academy h

QUICKSAND

CONTENT OVERVIEW

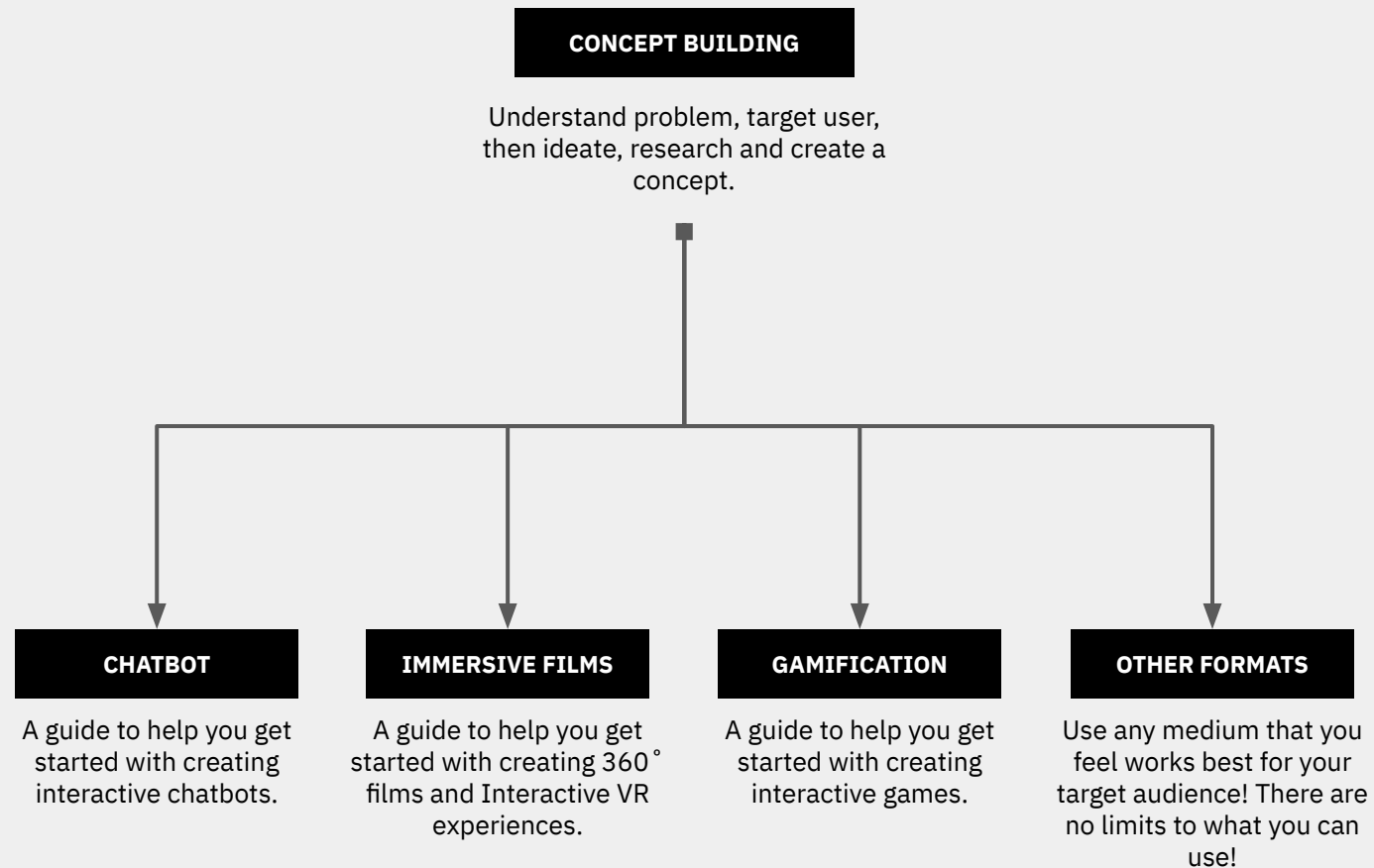## BUILDING INNOVATIVE LEARNING RESOURCES
PREFACE

This is the first in a set of toolkits to create user-driven, innovative learning resources in new and emergent formats.

While this toolkit will help you flesh out a concept from scratch, the other three parts will help you further develop your concept into a chatbot, immersive film or gamified experience. However, this is not to say that those are the only kinds of resources you can create — you can use this Concept Building Toolkit as a springboard to developing in other learning mediums and technologies.

This document will also take you through the process of evaluating impact and iterating on your creations.

HOW TO USE EACH TOOLKIT

CONCEPT BUILDING

Understand problem, target user, then ideate, research and create a concept.

CHATBOT

A guide to help you get started with creating interactive chatbots.

IMMERSIVE FILMS

A guide to help you get started with creating 360˚ films and Interactive VR experiences.

GAMIFICATION

A guide to help you get started with creating interactive games.

OTHER FORMATS

Use any medium that you feel works best for your target audience! There are no limits to what you can use!

GUIDING APPROACH

HUMAN CENTRED DESIGN

This toolkit adopts the approach of Human Centred Design (HCD) and, more specifically, Design Thinking. These approaches borrow from multiple problem solving methods, from a number of disciplines and subjects. The power of the method lies in an understanding of bringing people and systems together to frame sustainable solutions.

About Human Centred Design

Human Centered Design (HCD) is a creative and logical framework for solving complex problems through a lens that places the user and their context at the centre of any product or service.

About Design Thinking

As a process, Human Centred Design often manifests as 'Design Thinking'. This method moves from building a deep contextual understanding of people's lives and ecosystems, to the scoping of a problem or opportunity, synthesis of insights, generation of ideas, and, finally, the creation and testing of concepts with target audiences. The method is characterised by its willingness to improve solutions through iteration.

HUMAN CENTRED DESIGN

HOW DOES IT WORK?

The 5-Stage Design Thinking Process

EMPATHISE	DEFINE	IDEATE	PROTOTYPE	TEST
Building an initial understanding of a problem or opportunity, the context, and people who are impacted by or influence it	Framing the specific problem(s) you are trying to build solutions for, keeping the user at the centre of focus	Generating creative ideas to address framed problems or opportunities	Building experienceable early versions of the solution	Test prototypes with target users to gauge effectiveness and suitability
Outcomes	**Outcomes**	**Outcomes**	**Outcomes**	**Outcomes**
• Scoping of opportunity or problem • Research report • Mapping of users and stakeholders • Project planning and visioning	• Research plans and decision on tools to use • Data from on field and secondary research • Preliminary learnings and insights	• Insights and key solution principles	• Challenge statements and solution goals • Ideas • Early concepts	• Refined concepts • Experienceable prototypes • Learnings and insights from user testing

HOW DOES IT WORK?

An Iterative, Cycle-Based Approach

A core aspect of Design Thinking is the agile movement between stages in the process. Cycling back to different stages to further tweak your concepts and ideas whenever necessary is crucial to developing a foolproof solution.

EMPATHISE **DEFINE** **IDEATE** **PROTOTYPE** **TEST**

One simple example of this is revisiting the 'Define' or 'Ideate' stage of your project once you have tested your solution and return with new findings.

Key Elements of Design Thinking

Empathy
The quality of understanding someone's joy, pain and anxieties without judging them. The commitment to making the time and effort understand someone's context first-hand.

Systems Thinking
A method of breaking down different aspects of a context and being able to see relationships and dependencies.

Making
The quality of converting thoughts into ideas, ideas into blueprints, and blueprints into concrete plans and real world objects and experiences.

Experience Centered
The quality of thinking of solutions as end-to-end journeys that people go through, and a desire to elevate certain moments.

Participatory
The quality of including diverse opinions and skills in the process of identifying, building and assessing solutions.

Iterative
The quality of constantly improving solutions based on learning and insight accumulated at each stage. To embrace the spirit of experimentation and exploration.

Phase 1 : Empathise

CONDUCTING RESEARCH

The first step towards building your concept is to understand the context and user you are addressing.

Using a combination of research methods, you will be able to directly engage with the people and environment you are designing for, an understanding that will inform the framing of problems and insights in the 'Define' phase.

PLANNING YOUR RESEARCH

Objective of Exercise

- To choose research methods that best suit the understanding you need to establish
- To plan how you will go about conducting your research

| EMPATHISE | DEFINE | IDEATE | PROTOTYPE | TEST |
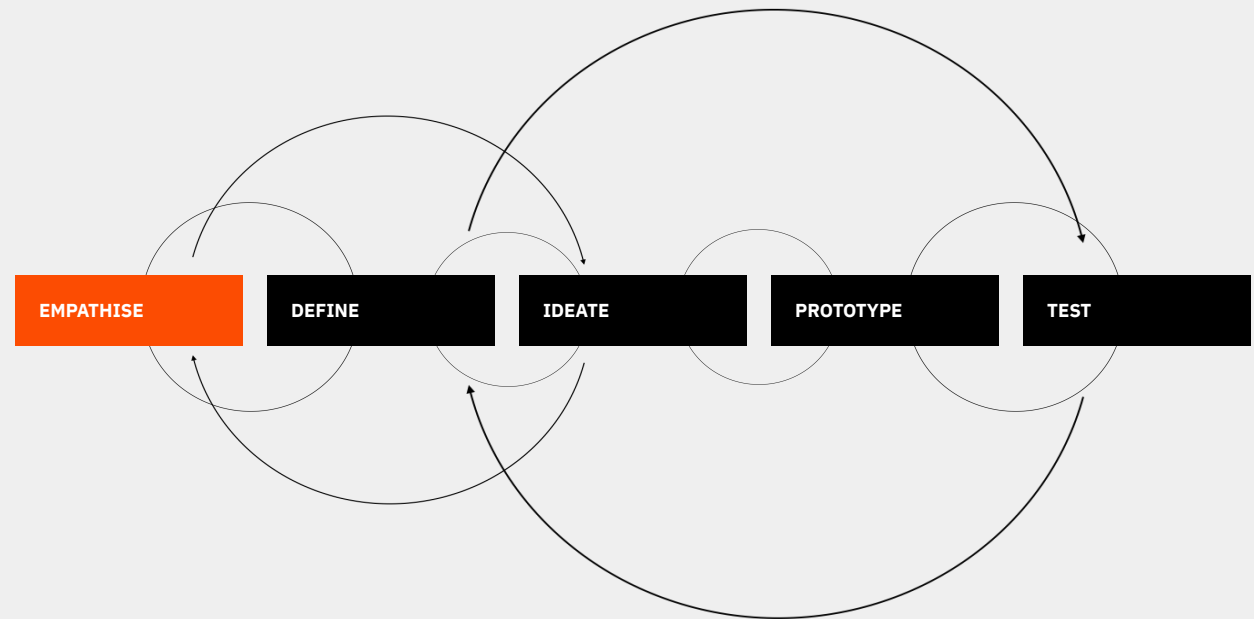
Tools

Secondary & Expert Research
This comprises research done by reviewing existing knowledge and content and through conversations with experts.

Primary Research
Research done through interactions with users, observing users and systems, and often by becoming a user/customer and experiencing a service or product first-hand. It is called primary because it is new research done that is not entirely dependent on existing knowledge or information.

Research Plan
The research plan serves as a template to organise your activities before starting research.

RESEARCH PLAN

Objective of Exercise
To plan out a research schedule and map out research activities

About 'Research Plan'
A Tool to help plan out research activities and distribute tasks amongst team members before starting.

HOW TO USE?

Research Tools	Key Themes / Lines of Inquiry	Questions to Ask	Place/Time	Research Participants	Team / Individual Responsible
Secondary Research					
Expert Research					
User Research					
Observational Research					

1 **Tools, Themes, Aspects**
Decide: The final tools, themes and key questions/aspects to focus on during research.

2 **Respondents & Locations**
Decide: Where and with whom will the research be conducted.

Phase 1 : Empathise

TOOL: RESEARCH PLAN

Research Tools	Key Themes / Lines of Inquiry	Questions to Ask	Place/Time	Research Participants	Team / Individual Responsible
Secondary Research *Research done by reviewing existing knowledge and news content (i.e. not in person research with users and other stakeholders)*					
Expert Research *Research done by interviewing subject matter experts*					
User Research *Research done through interactions with users, observing users and systems, and often by becoming a user/customer and experiencing a service or product first hand.*					
Observational Research *Research done by observing users and other stakeholders going about their rituals and routines without them necessarily realising that they are being studied.*					

RESEARCH TOOLS

Category 1: Secondary Research

Potential Sources:
(Online or Offline)
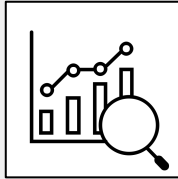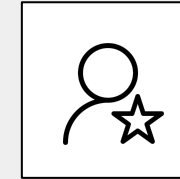

Company Reports
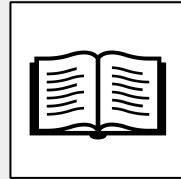
Academic Publications

News & Blogs
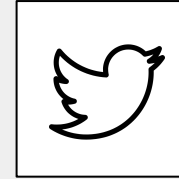
Social Media

Experts

1 **Scope of Research**
The reason for which the secondary research needs to be done, how it will be used, and potential sources

2 **Themes, Sources & Channels**
The problem tree can be useful for identifying themes. Sources and channels (online or offline) can be decided based on some preliminary research and listing.

3 **Logistics**
The amount of time the team will dedicate to the research. Also, whether the research will be done before primary research or will continue in parallel.

4 **Documentation**
The manner in which the secondary research data will be captured. Create a template that suits the research requirement/reason.

* **Research with Experts**
Expert interactions can be done in person, via email, chat, online meetings - depending on the constraints of the project.

Reasons to do Secondary Research

To understand a subject better: A team may require to build better understanding on a particular subject because of limited internal expertise or previous research.

To understand competition and other similar solutions: Mapping existing solutions and competitors is useful to understand what's working and what's not.

To map trends: Secondary research can help map specific to company trends and broader political, economic, social, cultural, technological, environmental and legal trends that may be relevant to the scope of your project.

To prepare for 'Primary Research': Secondary research helps one be more informed and appropriately frame primary research if done before. It can also continue in parallel if there is potential value in doing so.
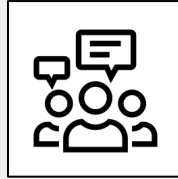
RESEARCH TOOLS

Category 2: Primary Research

Type 1: User Research

Tools

Interviews

Focus Groups

User Research Tools

Interviews: In-depth conversations with users and stakeholders that touch upon the themes identified. Design-related interviews are typically more conversational and open-ended.

Focus Group: Sessions with more than one participant at a time that can be framed around certain activities and discussions that yield useful insights.

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1 **Scope & Tools**
Plan: The tools, themes, and key questions that need to be addressed by the user research.

2 **Research Material**
Create: Research guides for the chosen tools. These guides will have the questions, flow of the activity (how much time, steps etc.)
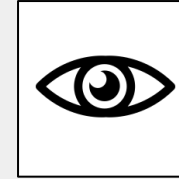
3 **Research Participants**
Choose and recruit: People from the stakeholder map who have the highest stake or influence in the problem or opportunity.

Type 2: Observational Research

Tools

Ethnography

Shadowing

Observational Research Tools

Ethnography: Although a larger concept, in this case, the tool is about observing users and other stakeholders going about their rituals and routines without them necessarily realising that they are being studied. There is no direct interaction with them.

Shadowing : Observing the user go about a task or their life routines in order to gather greater perspective on their attitudes, behaviours, and on the user experience.

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1 **Scope & Tools**
Plan: The tools, themes, key aspects of people's behaviours and systems that need to be observed, as well as the locations for research.

2 **Research Material**
Create: Research guides for the chosen tools. These guides will have the aspects to observe, and the overall flow of the activity

Phase 1 : Empathise

HOW TO USE?

Category 1: Secondary & Expert Research

Secondary Research - Open Template

Research Theme	Source	Type of Source	Data	Our Learning
Research Finding 1				
Research Finding 2				
Research Finding 3				

1

Reason & Theme
Decide: The reasons and themes on which the secondary research needs to be done.

2

Findings
Note down: The data that is found in the research in a template that captures sources, and learnings.

Category 2: Primary Research

Ethnography - POEMS Template for Observation

Objects	People	Environment
Services		Messaging

1

Location & Time Period
Decide: The location, amount of time, and frequency of observation.

2

POEMS
Note down: Observations in the the POEMS template (People, Objects, Environments, Messaging, Services)

Phase 1 : Empathise

TOOL: SECONDARY RESEARCH
Secondary Research | Open Template

Research Theme	Source	Type of Source	Data	Our Learning
Research Finding 1				
Research Finding 2				
Research Finding 3				

HOW TO USE?

Category 2: Primary Research

Components of a Discussion / Interview Guide

Respondent Info: Personal introduction and broad demographic data
Personal Intro: Researcher's introduction and purpose
Ice Breaker: The first few questions that set the mood and tone

Theme Based & Open-Ended Questions: That cover relevant aspects of the problem. Some fundamental things one aims to understand include -
- Aspirations and motivations that represent what the person wants in life
- Needs relevant to specific problems
- Current behaviours and actions relevant to the specific problem
- Specific motivators as a user to engage with a solution
- Specific pain points as a user engaging with a solution

Observing Activities (for Shadowing) : Any user activities that the researcher wants to observe and discuss with the respondent(s) while the activity is on.

①

Respondents
Choose respondent profiles that match target and stakeholders

②

Discussion Guide
Discuss & choose themes and questions to be included in the discussion guides

Category 3: Research Plan

Research Plan	Key Themes	Key Considerations	Research Tools	Research Participants	Location / Channels
Secondary Research					
Expert Research					
User Research					
Observational Research					

①

Tools, Themes, Aspects
Decide: The final tools, themes and key questions/aspects to focus on during research.

②

Respondents & Locations
Decide: Where and with whom will the research be conducted.

Research Best Practices

① **Plan before you head to the field** Know why and what you are doing

② **Put yourself in the shoes of users** Do not jump to your own conclusions

③ Seek **stories and experiences,** not just opinions

④ Ask **open-ended questions,** have **conversations** - do not lead!

⑤ **Record everything! Take notes, take photos, record video!** Don't miss out on texture and detail

⑥ **Inform** and **seek consent** before you start researching and recording conversations

⑦ **Reflect and note learnings** as you go over raw research data - do not leave it for later - **do it while it's fresh in your mind**

Phase 1 : Empathise

TOOL: DISCUSSION GUIDE

Respondent Info
Name:
Age:
Gender:
Occupation:
Income:

Remember to:
- Ask open-ended questions
- Circle back to identify contradictions
- Get to the heart of the topic (ask why creatively)
- Ask for stories or descriptions

1. Personal Intro
Hi, thank you for agreeing to participate in this research, I'm _____ and today we'll be chatting about your experience with _____ _____. There are no right or wrong answers, the more honesty the better, I may even ask you to repeat certain things, don't be surprised, it's to make sure I understand what your perspective.

2. Ice Breaker
I'd just like to start by having you tell me a bit about yourself. Age, occupation, hobbies?

How often do you [relevant action]?

When was the first time you [relevant action]? What was that like?

Open-ended Question (Reference)
- Can you walk me through a typical [day / routine / process]?
- Can you tell me of a time when you [experience]?
- How do you usually [routine / process]?
- What is your ideal setup for [experience / activity]?

Follow-up questions
- How does [activity / specific experience] make you feel?
- Why is [specific process step] important?
- Can you tell me more about [recent statement]?
- What about [action / situation] makes you feel [emotion described]?

3. Open-ended Question (Theme 1)
-
-
-

Follow-up questions
-
-
-

4. Open-ended Question (Theme 2)
-
-
-

Follow-up questions
-
-
-

5. Open-ended Question (Theme 3)
-
-
-

Follow-up questions
-
-
-

Phase 1 : Empathise

TOOL: OBSERVATION RESEARCH

Ethnography | POEMS Template

Objects
What are the key physical objects that form part of the experience?

Environment
What are the notable aspects about the space and ecosystem?

People
Who are the people involved? What are some of the interactions with them?

What are the key processes, interactions, and service elements that form part of the experience?
Services

What are some key communication elements that form part of the experience?
Messaging

Phase 1 : Empathise

Phase 2 : Define

DEFINING LEARNING OBJECTIVES

Now that you have a deeper understanding of the context and your user, the next step is to synthesise your finings into usable material to better understand the issue you want to tackle.

HOW TO USE?

DEFINING LEARNING OBJECTIVES

STAKEHOLDER MAP

Objective of Exercise
To identify the target user and understand people/organisations/ entities that constitute the ecosystem that influences the target user.

About 'Stakeholder Map '
The tool is used to develop an overarching understanding of the ecosystem of people, institutions, organisations, and any other entities who influence a user. The concentric circles are used to visually depict the distance of influence (direct or indirect). The size of bubbles/circles representing a stakeholder can be used to depict the degree of influence.

Target

Direct
Influencers

Indirect
Influencers

Other
Stakeholders
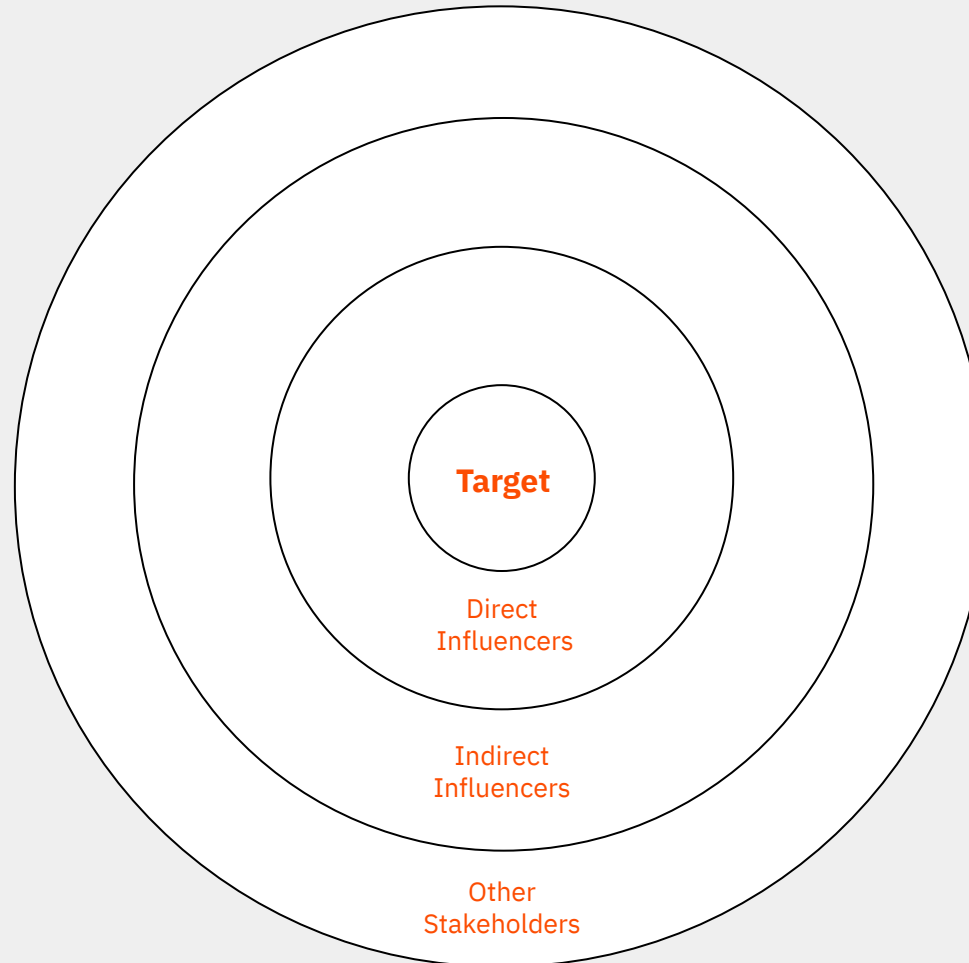
1

Target
Note down: The core target user/customer being designed for.

2

Direct Influencers
Note down: Those who have the most immediate influence on the target player.
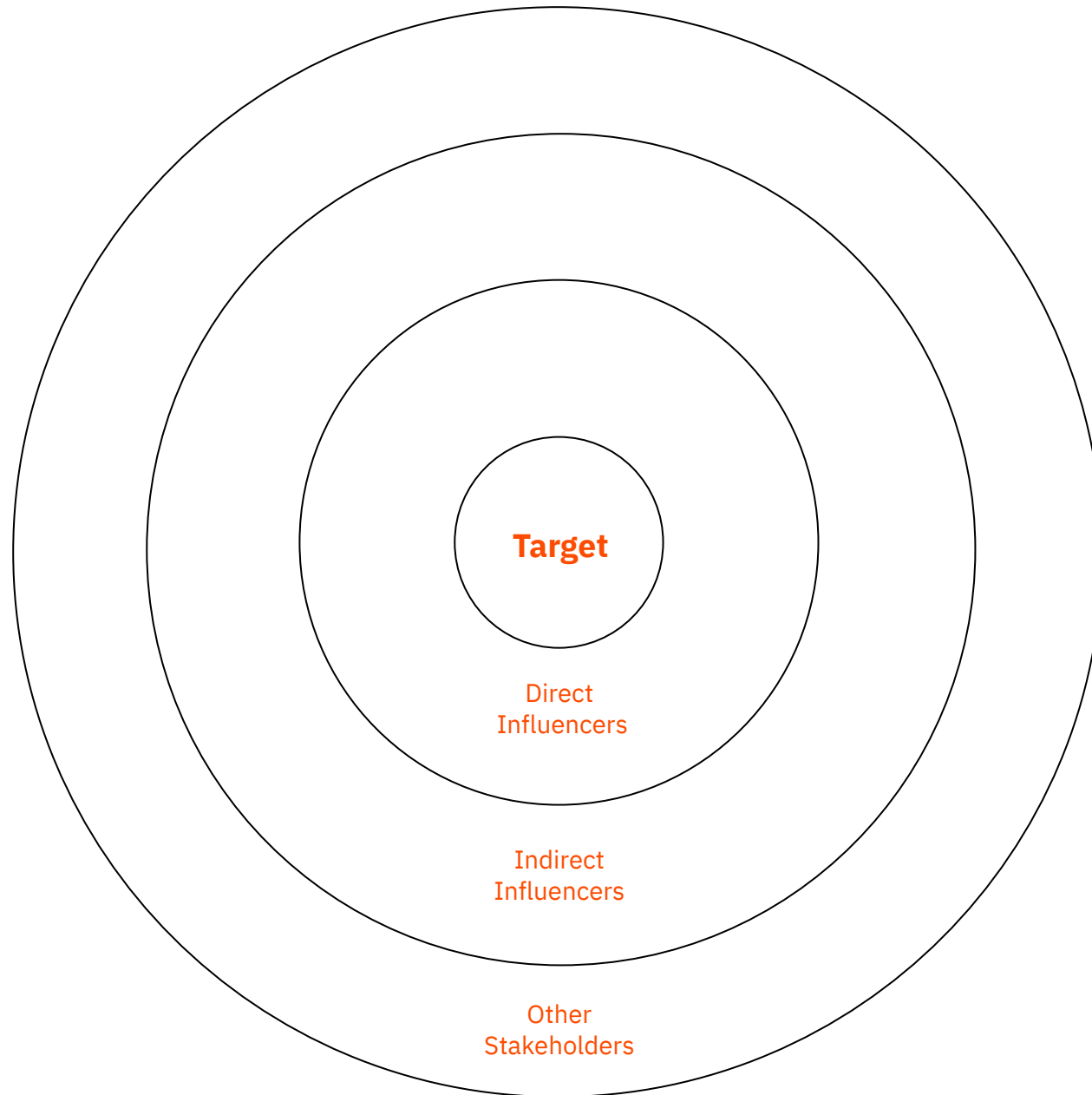
3

Indirect Influencers
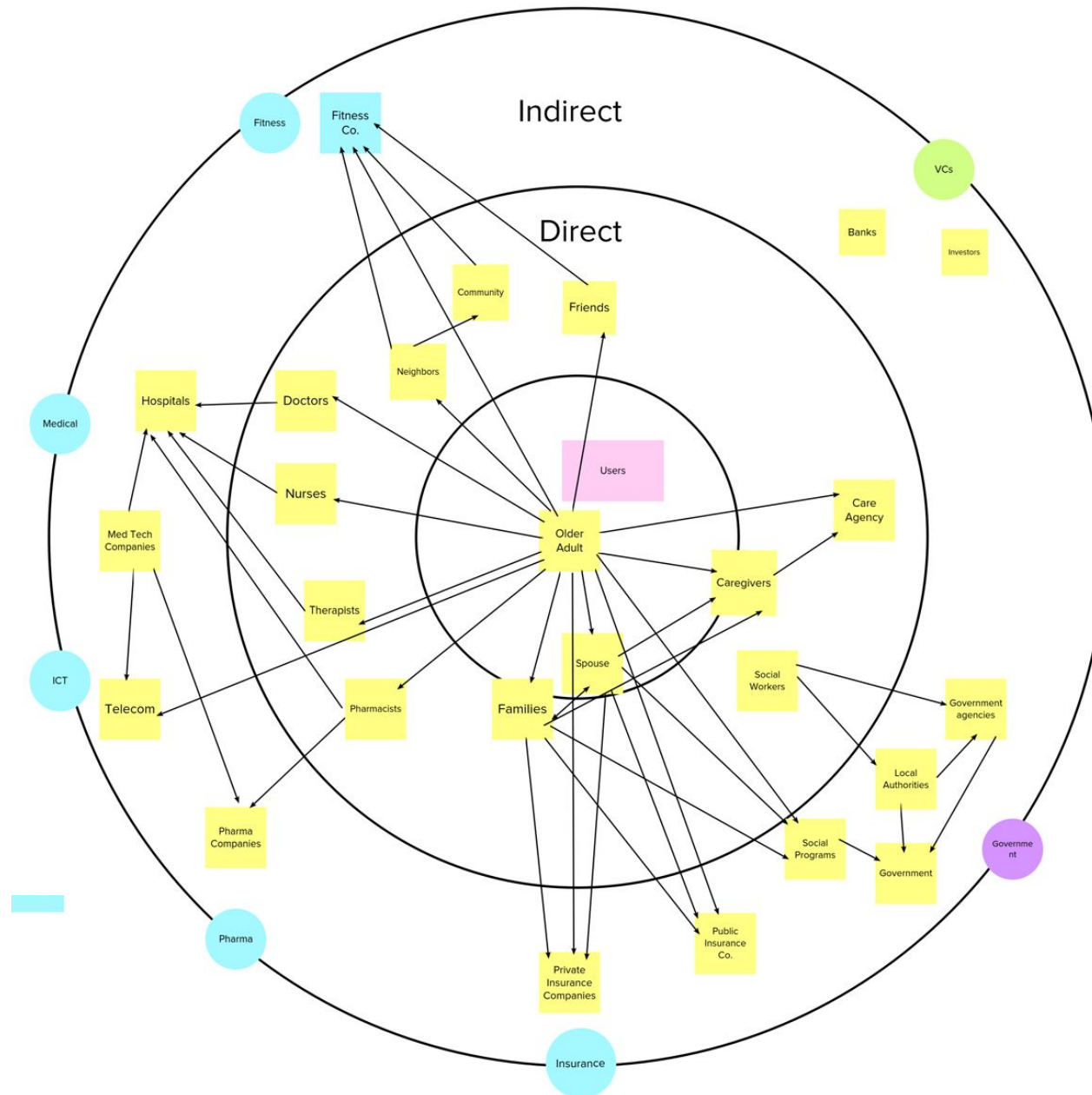**Note down:** Those who are not directly connected to the user but have important influence.

4

Other Stakeholders
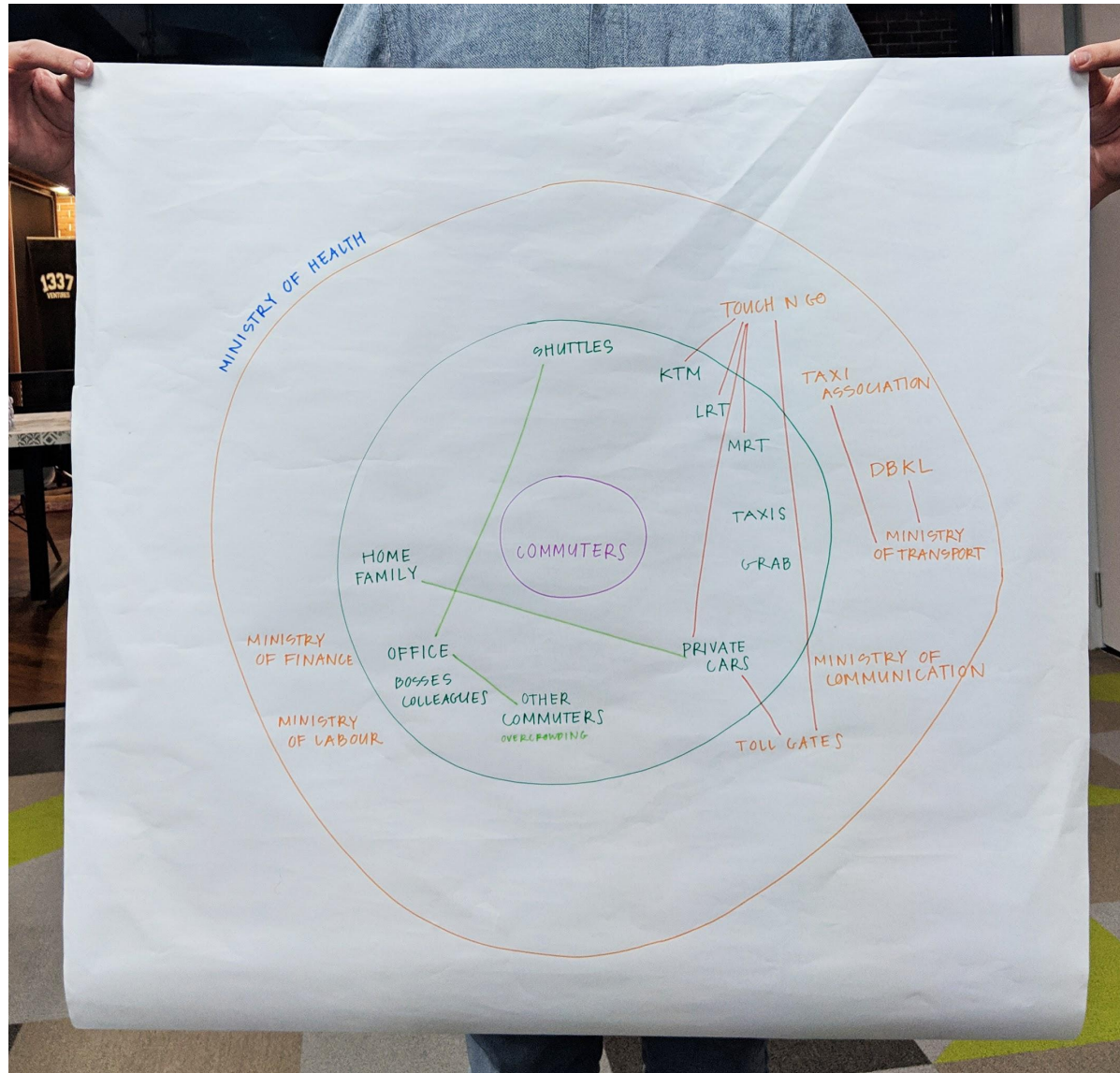**Note down:** Any other stakeholder who might have some influence on target user.

Phase 2 : Define

TOOL: STAKEHOLDER MAP

Target

Direct
Influencers

Indirect
Influencers

Other
Stakeholders

TOOL: STAKEHOLDER MAP

Indirect

Direct

Fitness

Fitness Co.

VCs

Banks

Investors

Community

Friends

Neighbors

Medical

Hospitals

Doctors

Nurses

Users

Care Agency

Med Tech Companies

Older Adult

Caregivers

Therapists

Spouse

Social Workers

Government agencies

ICT

Telecom

Pharmacists

Families

Local Authorities

Pharma Companies

Social Programs

Government

Government

Pharma

Public Insurance Co.

Private Insurance Companies

Insurance

HOW TO USE?

DEFINING LEARNING OBJECTIVES

PROBLEM TREE + 5 WHYS

Objective of Exercise
To establish a primary understanding of the elements of a problem or opportunity.

About 'Problem Tree'
The tool has three parts - the trunk (problem/opportunity), the branches (effects/signs), and the roots (causes/reasons). While traditionally the tool is looked only through a problem lens, we can also use it to evaluate opportunities.

About '5 Whys'
A tool that is a series of questions that helps us get to the root cause of something. It is used as a complementary tool to the problem tree.
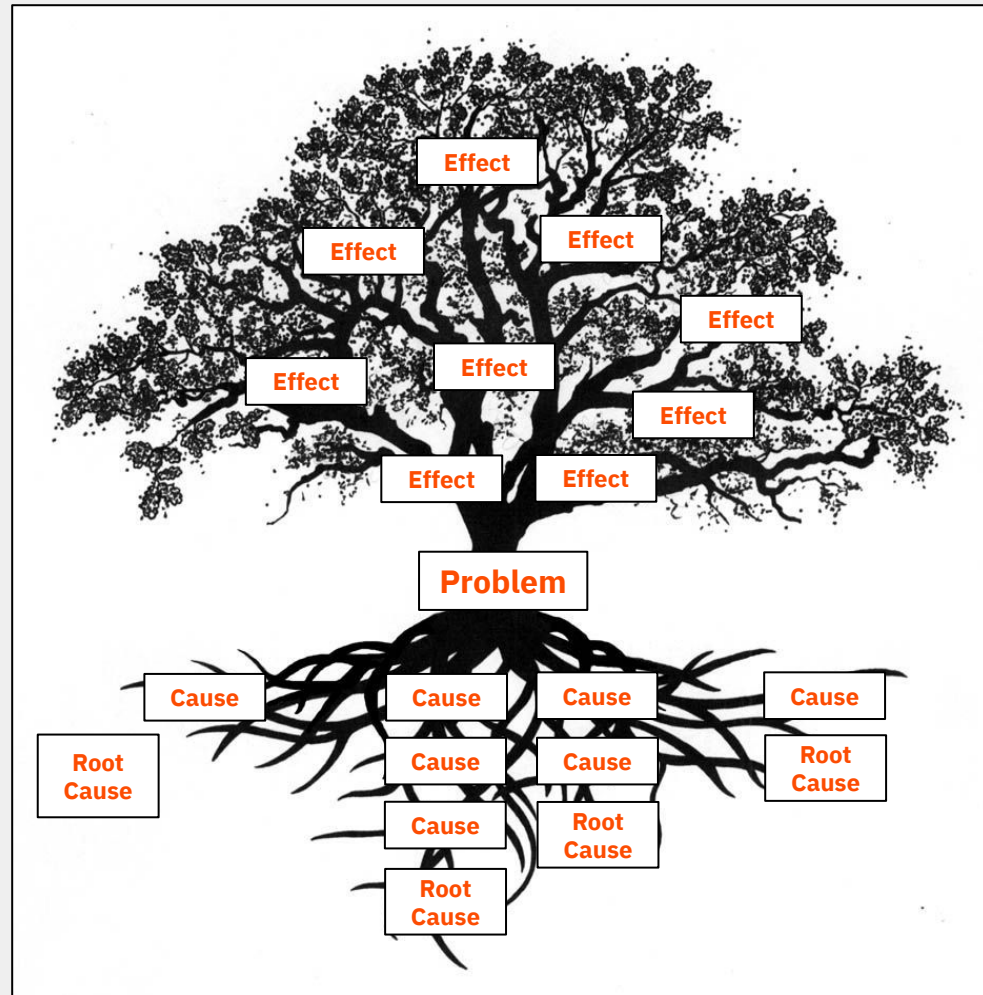
2

Effects
Note down: The effects and signs that qualify the problem or opportunity.

1

Problem or Opportunity
Note down: The main problem or opportunity that you are looking to work on.
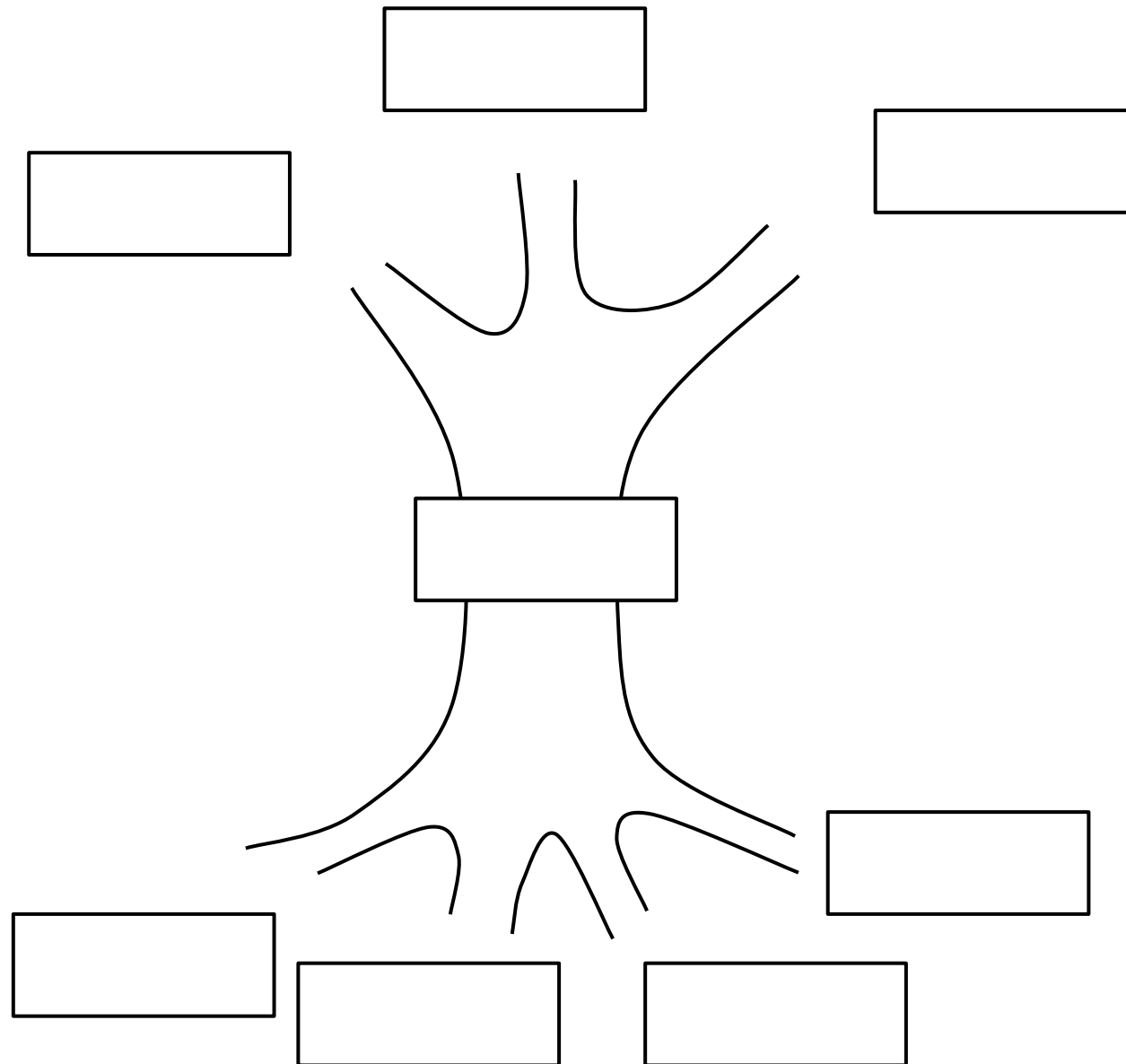
3

Causes
Note down: The causes or reasons that make it a problem or an opportunity.
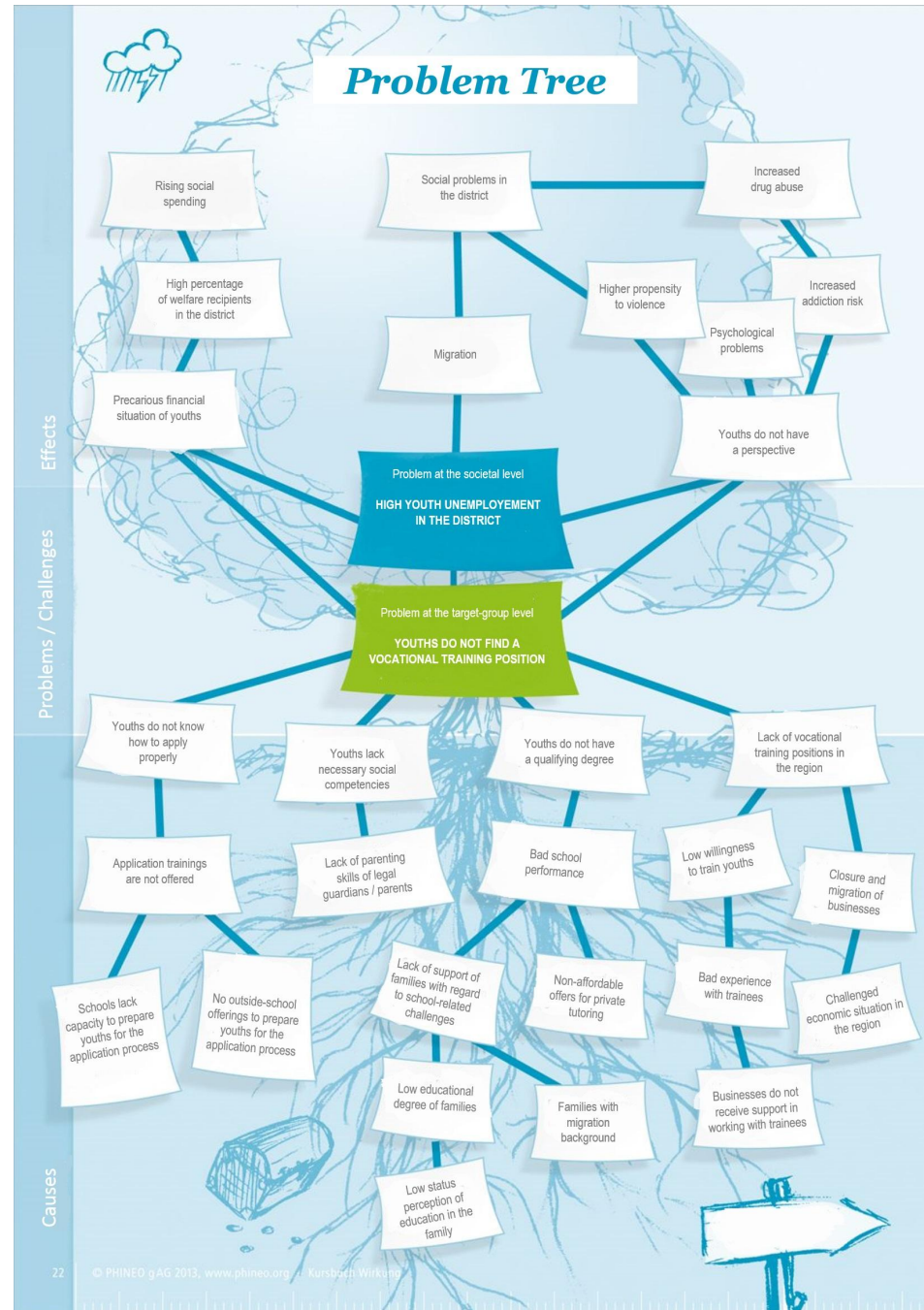
*

5 Whys?
To really get into the depth (or root cause/reason) of what makes something a problem or opportunity, we can use the '5 Whys' tool. Keep asking 'why?', until you feel that you have a strong enough root cause.
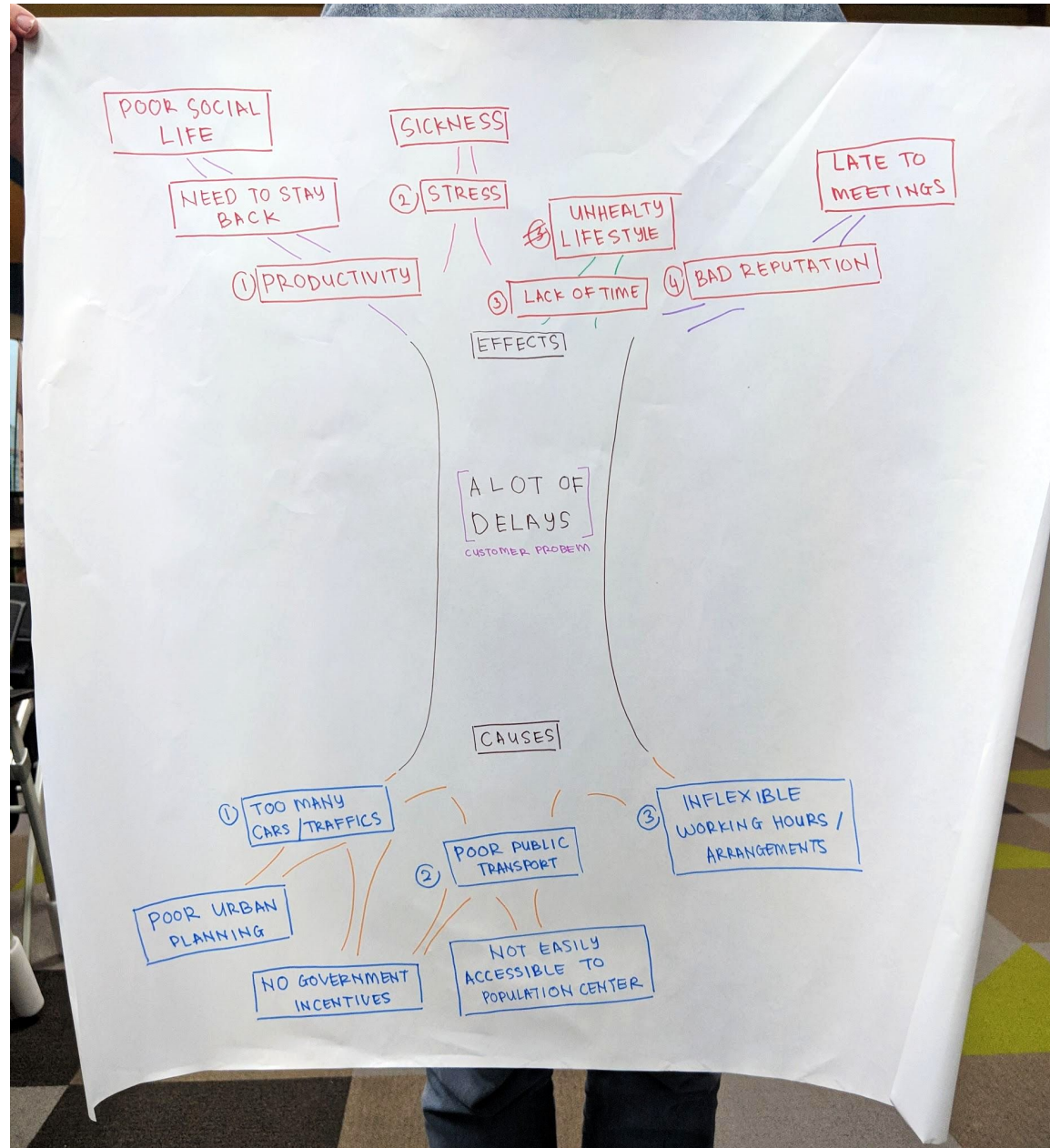
Phase 2 : Define

TOOL: PROBLEM TREE + 5 WHYs?

TOOL: PROBLEM TREE + 5 WHYs?

Problem Tree

Effects

- Rising social spending
- Social problems in the district
- Increased drug abuse
- High percentage of welfare recipients in the district
- Higher propensity to violence
- Increased addiction risk
- Migration
- Psychological problems
- Precarious financial situation of youths
- Youths do not have a perspective

Problem at the societal level
HIGH YOUTH UNEMPLOYEMENT IN THE DISTRICT

Problem / Challenges

Problem at the target-group level
YOUTHS DO NOT FIND A VOCATIONAL TRAINING POSITION

- Youths do not know how to apply properly
- Youths lack necessary social competencies
- Youths do not have a qualifying degree
- Lack of vocational training positions in the region
- Application trainings are not offered
- Lack of parenting skills of legal guardians / parents
- Bad school performance
- Low willingness to train youths
- Closure and migration of businesses

Causes

- Schools lack capacity to prepare youths for the application process
- No outside-school offerings to prepare youths for the application process
- Lack of support of families with regard to school-related challenges
- Non-affordable offers for private tutoring
- Bad experience with trainees
- Challenged economic situation in the region
- Low educational degree of families
- Families with migration background
- Businesses do not receive support in working with trainees
- Low status perception of education in the family

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Phase 2 : Define

USER PERSONA
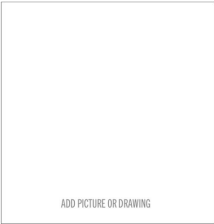
Objective of Exercise
To establish the needs and challenges of your user. To humanise the user to the point that one can empathise with, and create solutions for them.

About 'Persona'
Personas are fictional "characters" we create to represent a pattern/type of user or stakeholder for whom your game has to be developed. The persona is not a generic demographic profile but a summary of needs, behaviours, motivations, and challenges.

PERSONA
HOW TO USE?

	WHO AM I?	3 REASONS FOR ME TO ENGAGE WITH YOU	3 REASONS FOR ME NOT TO ENGAGE WITH YOU
ADD PICTURE OR DRAWING		1.	1.
PERSONA NAME:		2.	2.
AUDIENCE SEGMENT:		3.	3.

MY INTERESTS	MY PERSONALITY	MY SKILLS	MY DREAMS	MY SOCIAL ENVIRONMENT

1

Persona
Identify: Based on the research data, identify if there is a pattern emerging with regard to a particular type of user. This type can be the basis of the persona.

2

Details
Fill out: The sections under the different questions on the template based on the research collected, and the pattern emerging.

3

Image
Add: An image of a person who represents the pattern/persona. The image does not need to belong to a person who has participated in the research..

Phase 2 : Define

TOOL: PERSONA

ADD PICTURE OR DRAWING

PERSONA NAME:

AUDIENCE SEGMENT:

WHO AM I?

3 REASONS FOR ME TO ENGAGE WITH YOU

1.

2.

3.

3 REASONS FOR ME NOT TO ENGAGE WITH YOU

1.

2.

3.

MY INTERESTS

MY PERSONALITY

MY SKILLS

MY DREAMS

MY SOCIAL ENVIRONMENT

TOOL: PERSONA

I want to know the people I'm working with
by visualising their key characteristics

PERSONAS

ADD PICTURE OR DRAWING

PERSONA NAME:
MUSTAFA KHAN

AUDIENCE SEGMENT:
URBAN, MIDDLE CLASS

WHO AM I?
I AM 28 YEARS OLD, A SOCIAL WORKER. IN THE MENTAL HEALTH SPACE

3 REASONS FOR ME TO ENGAGE WITH YOU
1. COMMITTED TO CREATING SAFE SPACES
2. A SAFE WORLD FOR QUEER INDIAN MEN
3. WANTS TO BE ACCEPTED BY HIS FAMILY

3 REASONS FOR ME NOT TO ENGAGE WITH YOU
1. NO FAITH IN GOVT. INSTITUTIONS
2. NOT CLOSE TO FAMILY; FEELS ALONE
3. DISILLUSIONED; JUDGEMENTAL

MY INTERESTS
ACTIVISM
PAINTING
THEATRE

MY PERSONALITY
QUIET,
INTROSPECTIVE,
JUDGEMENTAL,

MY SKILLS
WRITER, POET,
ARTIST, ELOQUENT
SPEAKER

MY DREAMS
A SAFE INDIA
FOR QUEER MEN
—
ACCEPTANCE OF
MENTAL HEALTH
ISSUES

MY SOCIAL ENVIRONMENT
URBAN;
MIDDLE CLASS;
ISOLATED FROM
FAMILY;
FEW FRIENDS

The persona tool need not strictly stick to the template and can be used to hold additional information if needed for the project. Feel free to make it as expressive as you would like!

Phase 3 : Ideate

BUILDING IDEAS FOR LEARNING

Now that you have a good understanding of your subject and target users from your research and synthesis, it's time to start building ideas for the issues you have framed! Phase 3 will help facilitate your ideation sessions, at the end of which you will be able to express your ideas and the form they will take.

The next phase will involve choosing the medium in which you idea manifests, and what it could look like

GOAL & DESIGN CHALLENGE FRAMING

Objective of Exercise
To focus on the most important causes and the target audience while solving a problem. To approach problem solving in an actionable and strategic manner.

Tools
Solution Goal
Design Challenge Statement (How Might We?)

About Solution Goal
The Solution Goal is a statement that defines the overall strategy adopted by the problem solvers. It connects the overall problem, the cause of the problem, and the target audience.

About Design Challenge
'How Might We?' questions allow approaching the goal in a manner that can generate ideas. 'How Might We?' questions can be framed in different ways to generate different kinds of ideas and solutions.

Solution Goal

Address **(Problem/Opportunity for Target User / Persona)** by solving/exploring **(chosen cause/reason)** to achieve **(Desired Results)**

Design Challenge 1

How Might We **(potential action based on insight)** to achieve **Solution Goal**?

Design Challenge 2

How Might We **(potential action based on insight)** to achieve **Solution Goal**?

Design Challenge 3

How Might We **(potential action based on insight)** to achieve **Solution Goal**?

Final Design Challenge

1

Solution Goal
Note down: The goal that has to be met by the solution.

2

Design Challenges
Frame: Versions of challenges that could help approach the solution goal.

3

Final Design Challenge
Choose: A final design challenge that ideas can be identified for.

*

Framing a Design Challenge
The challenge should neither be broad nor too narrow. The goal and challenge should be rooted in what is known based on your research. It should also be anchored around the earlier framed personas.

TOOL: GOAL & DESIGN CHALLENGE

Solution Goal

Address **(Problem/Opportunity for Target User / Persona)** by solving/exploring **(chosen cause/reason)** to achieve **(Desired Results)**

Design Challenge 1

How Might We **(potential action based on insight)** to achieve **Solution Goal**?

Design Challenge 2

How Might We **(potential action based on insight)** to achieve **Solution Goal**?

Design Challenge 3

How Might We **(potential action based on insight)** to achieve **Solution Goal**?

Final Design Challenge

Phase 3 : Ideate

TOOL: GOAL & DESIGN CHALLENGE
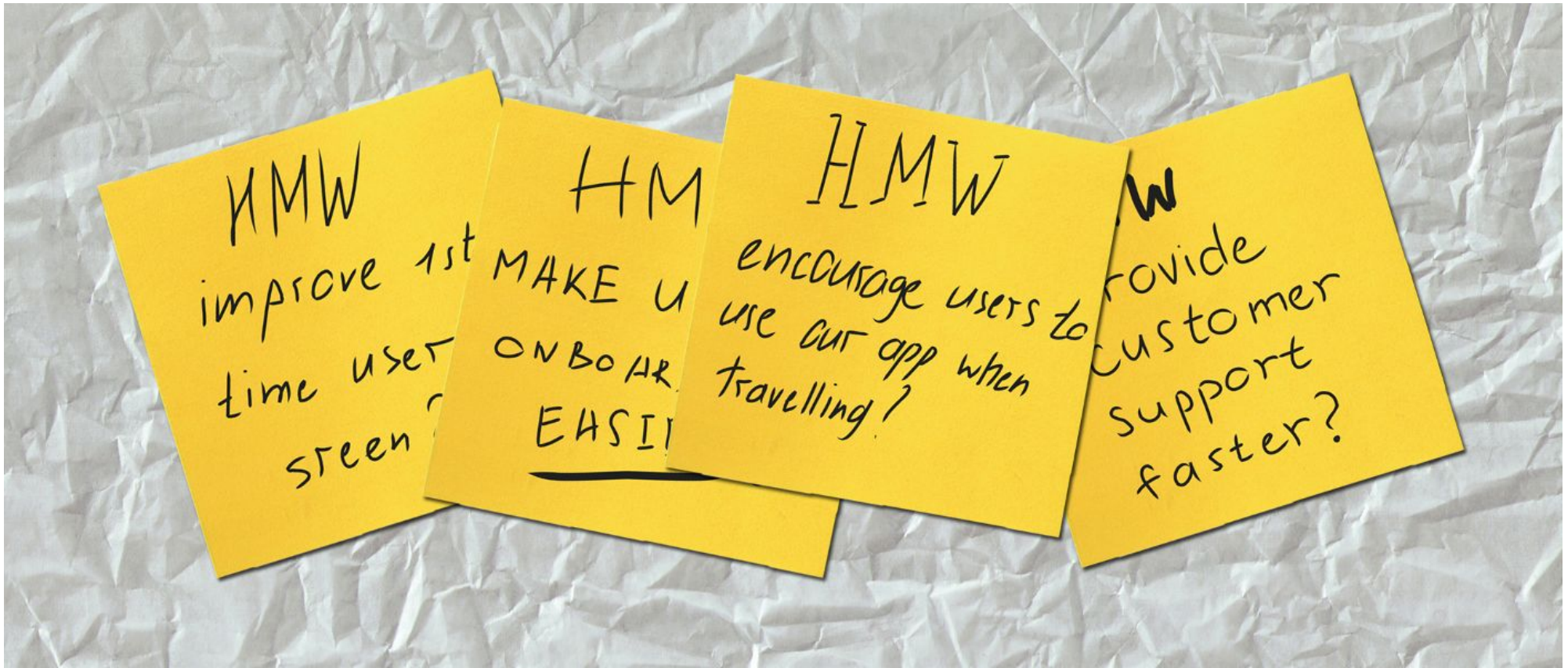
IDEA GENERATION

Objective of Exercise
To generate as many creative ideas as possible. To organise ideas by theme/focus/type.

Tools
First Idea + Crazy Idea
What If?
SCAMPER

About First Idea + Crazy Idea
To get the ball rolling, this is used to get the top of mind ideas out of the way.

About What If?
A tool that lists some fairly straight forward macro options there are for solutions.

About SCAMPER
A tool that is especially useful to think of options for solutions at a micro level.

HOW TO USE?

Brainstorming Principles

1 Encourage **wild ideas and don't judge** if they will work immediately.

2 Come up with as many ideas as possible - **go for quantity!**

3 **Record everything!** Don't miss out on important thoughts and discussions.

4 **Build on the ideas of others** and **stay focused** on the topic while discussing.

5 Encourage **one conversation at a time** so each idea gets full attention.

6 **Iterate!** Most times solutions are not obvious.

Tool 1: First Idea + Crazy Idea

First Idea
What are the first ideas that to your mind?

Crazy Idea
What are the crazy ideas that come to your mind?

1

First Ideas
Note down: The first, top of mind ideas that everyone participating has.

2

Crazy Ideas
Note down: The most crazy ideas that everyone participating has.

Phase 3 : Ideate

HOW TO USE?

Tool 2: What If?

What if the solution...?

- Is a physical object or a thing
- A service or process
- A person or set of people
- A digital interaction
- A piece of communication

1

Design Challenge
Review: Review the design challenge, insights, journeys, and persona.

2

What If?
Note down: Ideas under each of the types (physical object, service, person, interaction, communication)

Tool 3: SCAMPER

Does the solution lie in...?

- **S**ubstituting, replacing or changing some part or whole of something?
- **C**ombining two or more parts of something into something new?
- **A**dapting or being inspired from something else that has worked?
- **M**odifying, magnifying or minimising some part of whole of something?
- **P**utting something to a different use than initially thought?
- **E**liminating some part or entirety of something?
- **R**earranging the sequence or order of parts of something?

1

Insights, Journey, Persona
Review: Review the insights, the journey map, and the persona.

2

SCAMPER
Note down: Ideas that emerge by asking the seven different questions under SCAMPER (Substitute, Combine, Adapt, Modify, Put to Another Use, Eliminate, Rearrange).

IDEATION TOOLS: First Idea + Crazy Idea, What If?

First Idea + Crazy Idea

First Ideas
What are the first ideas that come to the minds of individuals on the team?

Crazy Ideas
What are the crazy ideas that come to the minds of individuals on the team?

What If the solution...?

Is a physical object or a thing

A service or process

A person or set of people

A digital interaction

A piece of communication

IDEATION TOOLS: SCAMPER

SCAMPER | Does the solution lie in...?

Substituting, replacing or changing some part or whole of something?

Modifying, magnifying or minimising some part of whole of something?

Rearranging the sequence or order of parts of something?

Combining two or more parts of something into something new?

Putting something to a different use than initially thought?

Adapting or being inspired from something else that has worked?

Eliminating some part or entirety of something?

IDEATION TOOLS: SCAMPER

Glass Lunchbox
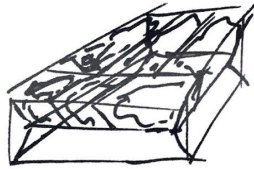
"Substitute"

Lunchbox/Pencil Case
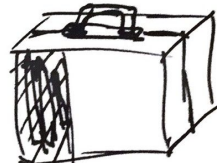
"Combine"

Lunchboxketball
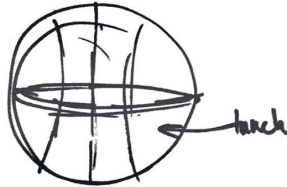
lunch

"Adapt"

Commute
Pannier Lunchbox

"Manify/Modify"

Lunch Speaker box
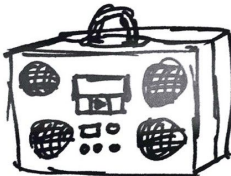
"Put to other use"

Lunchbox with removable tray

"Eliminate"

Cooler and Heat box

"Reverse/Rearrange"

PUT TO OTHER USE

Use for cleaning supplies
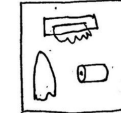
Use for bathroom supplies

Use for craft supplies

ELIMINATE
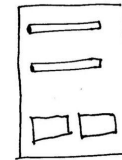
No paper towel holder
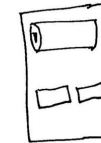
No foil or paper holder

No plastic bag holder

REVERSE/REARRANGE

Inverted layout
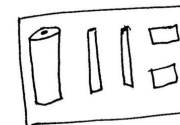
landscape rather than portrait

IDEATION
IDEA PRIORITISATION

Objective of Exercise
To choose the ideas to take forward into prototyping. To ensure that ideas are taken through a robust prioritisation process.

Tool
Idea Prioritisation Grid

HOW TO USE?

Idea Prioritisation Grid

High Impact

High Feasibility

Low Feasibility

Low Impact
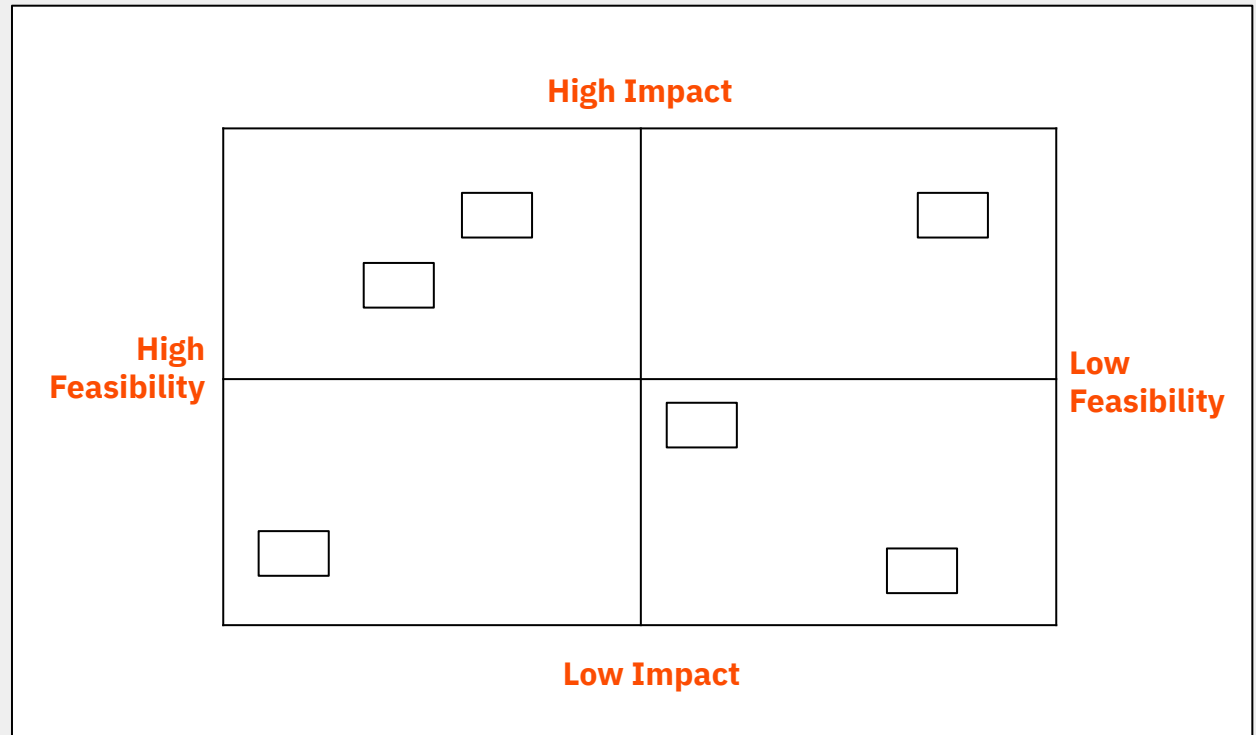
1
Criteria
Review: Criteria for the prioritisation grid (2x2).

2
Ideas
Organise and map: The ideas for prioritisation on the tool.

3
2x2 Grid
Map: Ideas on the prioritisation grid to a macro - impact (on user experience or need) and feasibility (technology, resources, skills) map - required to take decisions on ideas moving forward.

Phase 3 : Ideate

TOOL: IDEA PRIORITISATION GRID

Idea Prioritisation Grid

High Impact

High Feasibility

Low Feasibility

Low Impact
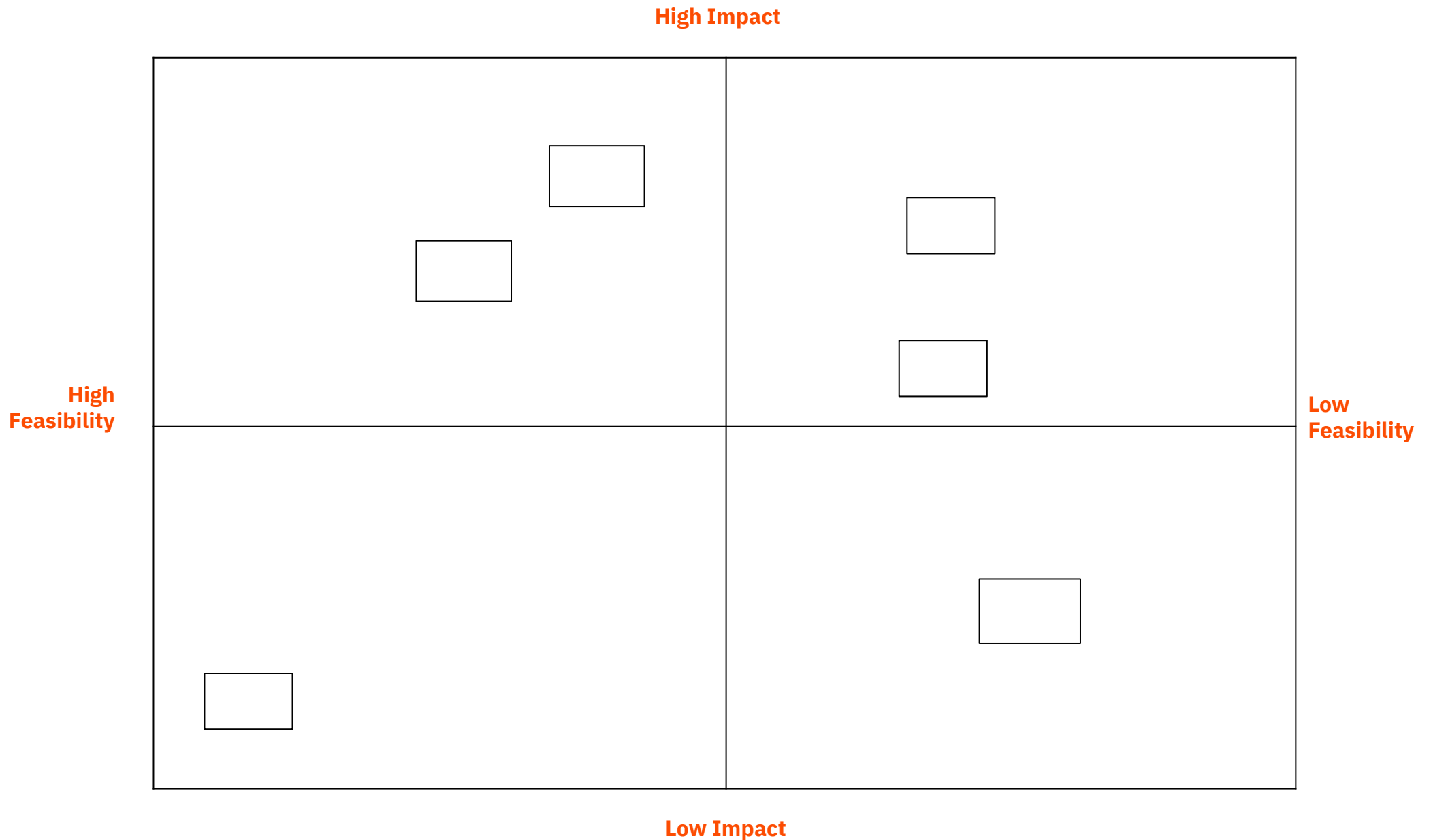
Phase 4 : Prototype

PRESENTING YOUR IDEA

In this phase, your ideas will start taking their first steps into becoming a reality. Here, you will take ideas as per your earlier prioritisation and attempt to represent them in an appropriate format.

Be sure to refer to the Gamification, Immersive Film and Chatbot toolkits at this stage in the event that your chosen format aligns with any of these.

Once you are satisfied with what you have created, the next phase will give you direction in how to test them as per performance on different parameters.

PROTOTYPE
BUILDING PROTOTYPES

Objective of Exercise
To bring ideas to life through quick representations that can help think through details. To create a testable asset for users to provide feedback on.

Tools
Storyboards
Role Play
Wireframes
Physical Models

About 'Storyboarding'
An end-to-end visualisation of a process or service with many parts. Inspired by film makers and comics, storyboards help see and react to the big picture before making a commitment to full production.

About 'Physical Models'
Physical representations of objects that form part of the solution, made usually with easily sourced materials.

HOW TO USE?

Tool 1: Storyboards

1.	2.	3.	4.
Summary:	Summary:	Summary:	Summary:
5.	6.	7.	8.
Summary:	Summary:	Summary:	Summary:

1 — ### End to End Journey / Service
Consider: If a storyboard is best used to represent the idea. Is the idea a process or service with many steps that need to be visualised?

2 — ### The Steps / Frames
Break it down: Into the distinct stages or steps that you want to visualise. These steps could belong to a macro level journey, or you may want to get into detail for one part. Each distinct step can be visualised and detailed as a frame.

3 — ### Visualise
Draw it out: Draw the key frames out including people, interactions, conversations, messaging etc. out to summarise the end to end journey or service.

* — ### Not fine art
The visualisations on a storyboard do not need to be of a high quality. They need to be functional and capable of communicating the essence of what is happening at each step.

Tool 2: Physical Models
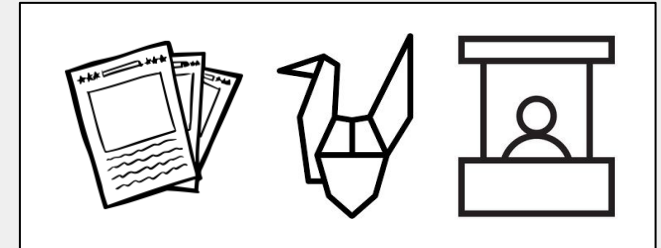
1 — ### Physical Objects
Consider: If physical objects are the best way to represent the idea. Is it a critical physical component (poster, form, machine, space etc.) of the service that needs to be modelled? Can the same job be done by a storyboard?

2 — ### Form & Material
Choose: The form that the physical model needs to take. The level of construction that should be appropriate to communicate the concept to a fair degree of similarity. The material used to build the physical object in the simplest form.

3 — ### Construct
Build: The physical object with the material available.

* — ### Physical Model vs. Storyboard
There may not be a need to build a physical model in case one is trying to explain a journey. Storyboards will be sufficient for this. A physical model should be built for a part of the product or service experience of the user that a storyboard can't quite do justice to. For example, physical models for a sign up form, or a physical booth, or a QR code poster — things that users will actually experience — can be made..

Phase 4 : Prototype

PROTOTYPE

STORYBOARDING TOOL

Objective of Exercise
To begin defining the narrative or story of your game. By putting down your story on paper, you will be able to see your narrative as a whole and spot any problems or opportunity areas.

About Storyboards
Storyboarding is a tool which will help you visualise your game. It is an end-to-end visualisation of the game. Inspired by film makers and comic artists, storyboards help visualise and react to the big picture before making a commitment to full production.

This tool can also be used to map non-linear journeys. Edit the numbering on the boxes to signify the flow, or you can also create visual flow charts if that helps.

STORYBOARDING TOOL
HOW TO USE?

1.	2.	3.	4.
Summary:	**Summary:**	**Summary:**	**Summary:**

5.	6.	7.	8.
Summary:	**Summary:**	**Summary:**	**Summary:**

1 **End to End Narrative**
Consider: If a storyboard is best used to represent the idea. Is the idea a process or service with many steps that need to be visualised?

2 **The Steps / Frames**
Break it down: Into the distinct stages/steps that you want to visualise. These steps could belong to a macro level journey or you may want to get into detail in one part. Each distinct step can be visualised and detailed as a frame.

3 **Visualise**
Draw it out: Draw the key frames out including people, interactions, conversations, messaging etc. out to summarise the game.

* **Not fine art**
The visualisations on a storyboard do not need to be of a high quality. They need to be functional and capable of communicating the essence of what is happening at each step.

Phase 4 : Prototype

PROTOTYPING TOOLS: STORYBOARDING

1.

Summary:

2.

Summary:

3.

Summary:

4.

Summary:

5.

Summary:

6.

Summary:
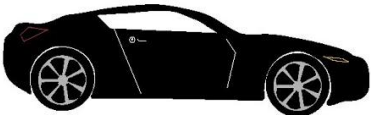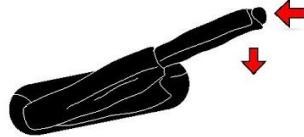
7.

Summary:

8.

Summary:

PROTOTYPING TOOLS: STORYBOARDING

HOW TO START A CAR	HOW TO START A CAR	HOW TO START A CAR	HOW TO START A CAR
	Place key in door	When key in hole, turn to unlock	Open door and hop in

HOW TO START A CAR	HOW TO START A CAR	HOW TO START A CAR	HOW TO START A CAR
Pull lever up to adjust the seat	Adjust mirror	Put seatbelt on	Put key in ignition

HOW TO START A CAR	HOW TO START A CAR	HOW TO START A CAR	HOW TO START A CAR
Put foot on brake	Turn key, to start	Place in drive, button in and move from park (P) to drive (D)	Take off handbrake, push in button and push lever down

HOW TO START A CAR	HOW TO START A CAR
Slowly remove foot off break, place slowly on accelerator	OFF YOU GO!

Phase 4 : Prototype

ADDITIONAL MATERIAL

As mentioned in the beginning of this chapter, refer to our ancillary toolkits to assist you with the process of creating certain kinds of outputs
(in the event that choose one of those formats)

Toolkit Links

Gamification Toolkit
Immersive Toolkit
Chatbot Toolkit

Each guiding document has an overview of the output format being talked about.

Choosing a Medium

Medium	Overview
Gamification	Serious games are games intended for a purpose other than pure entertainment such as training, learning or practicing an existing skill. There is plenty of evidence that these game-based learning has been applied successfully in different sectors.
Immersive Experiences	Virtual Reality and 360° video are mediums that provide for highly immersive experiences and can be leveraged to enhance storytelling. They can help create experiences which give the user the feeling of being in an environment that you want them to see. This can be especially useful when you want viewers to see someone's point of view, step into the subject's shoes and perhaps even empathise with what they are experiencing.
Chatbot	A chatbot is an automated and interactive program which can hold a conversation with a user, often helping answer their questions. They can often be found on websites, social media platforms, and instant messaging apps, amongst other places. Most commonly used in the customer service industry, these 'conversational agents' attempt to mimic written or spoken human speech to simulate a conversation with a real person.

Phase 5 : Test

GAUGING EFFECTIVENESS
& SUITABILITY

Now that you created a prototype of your idea, it's time to test it out! You can use the prototype you have created to test the idea with your target users and get initial feedback, after which you can iterate and make changes before starting work on the final solution.
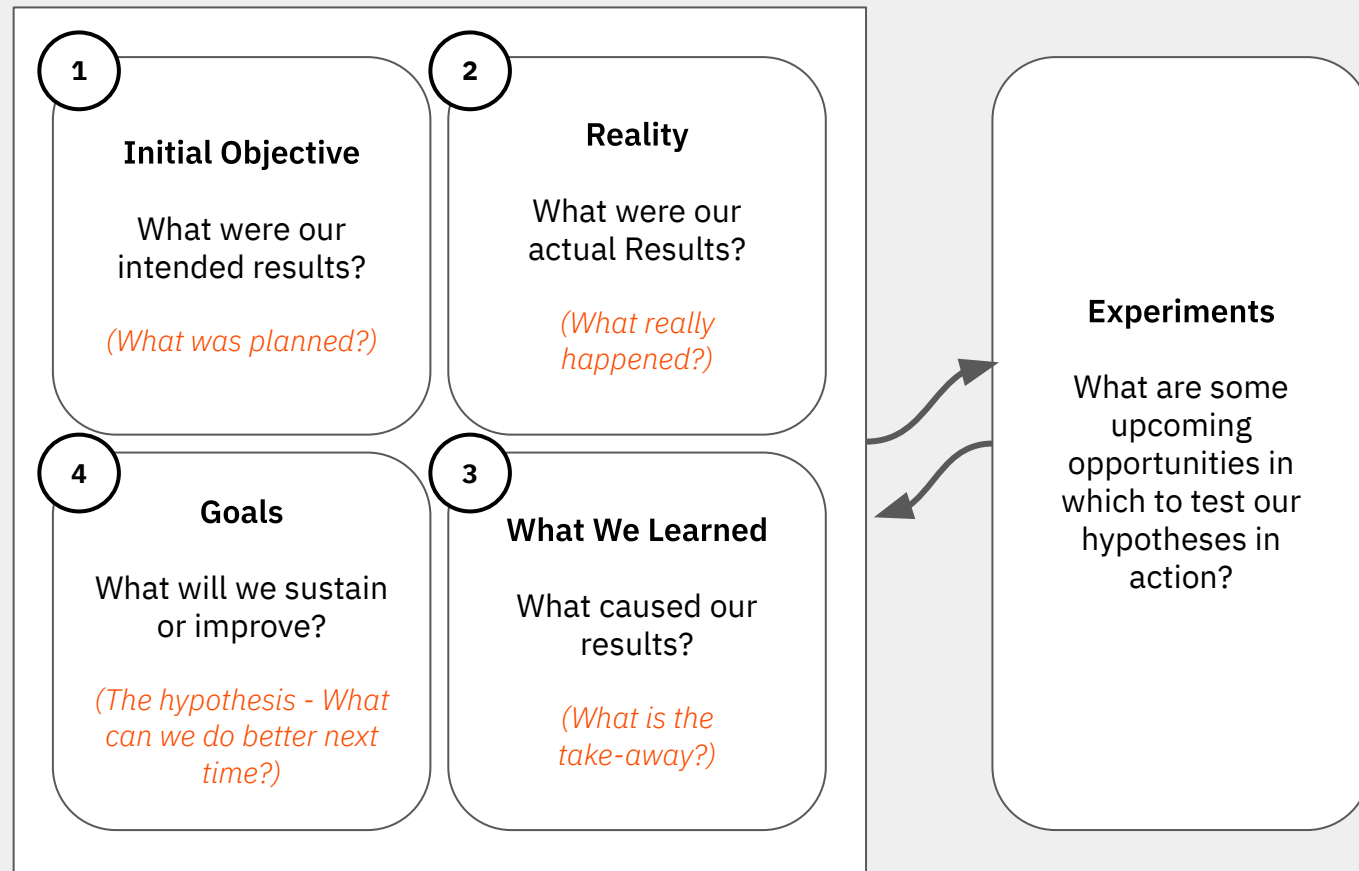
AFTER ACTION REVIEW

Objective of Exercise
To test players' reactions, the meeting of learning objectives, the transfer of work-related knowledge and skills, and the overall impact of the prototype.

About 'After Action Review'
AAR is a performance improvement tool to review and critique completed actions. It allows the group to reflect objectively on what happened in a given situation, in order to work out improvements for future practice.

AFTER ACTION REVIEW
HOW TO USE?

1

Initial Objective

What were our intended results?

(What was planned?)

2

Reality

What were our actual Results?

(What really happened?)

4

Goals

What will we sustain or improve?

(The hypothesis - What can we do better next time?)

3

What We Learned

What caused our results?

(What is the take-away?)

Experiments

What are some upcoming opportunities in which to test our hypotheses in action?

1

Discussion
Write the questions down on a large flipchart and ensure that the whole team is involved in giving opinions

2

Specific Actionables
Actionable recommendations should be as specific as possible

3

Purpose
Remember, an AAR is not a critique, problem solving, or allocating blame. This exercise is about comparing actual output of the process to the expected output

Phase 5 : Test

PROTOTYPING TOOLS: AFTER ACTION REVIEW

(1) **Initial Objective**

What were our intended results?

(What was planned?)

(2) **Reality**

What were our actual results?

(What really happened?)

Experiments

What are some upcoming opportunities to test our hypotheses in action?

(4) **Goals**

What will we sustain or improve?

(The hypothesis - What can we do better next time?)

(3) **What We Learned**

What caused our results?

(What is the take-away?)

Phase 5 : Test

Cycling Back

ITERATIVELY REWORKING YOUR PROCESS

Integral to this design process is the revisiting of relevant phases based on how your exercise progresses. You might want to go back to certain points or activities that new findings might have an impact on, or where you feel you could adopt another approach. For example, articulating problem statements in Phase 2 might throw up some information gaps which you might have to address by reverting to some of the research activities in Phase 1.

Get in Touch!

Do get in touch with us, and let us know what you thought of this toolkit! We'd love to hear from you.

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