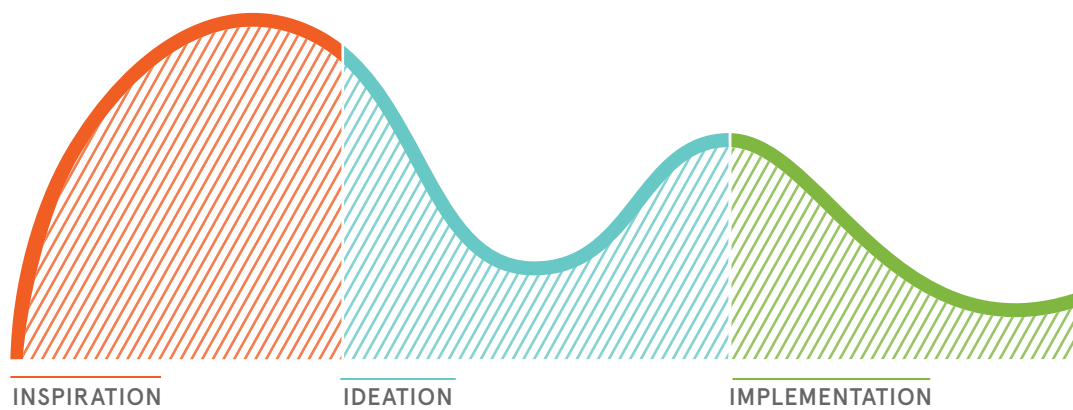


2

Inspiration Phase



The Design Process

Table Of Contents

Class 2 Inspiration Phase

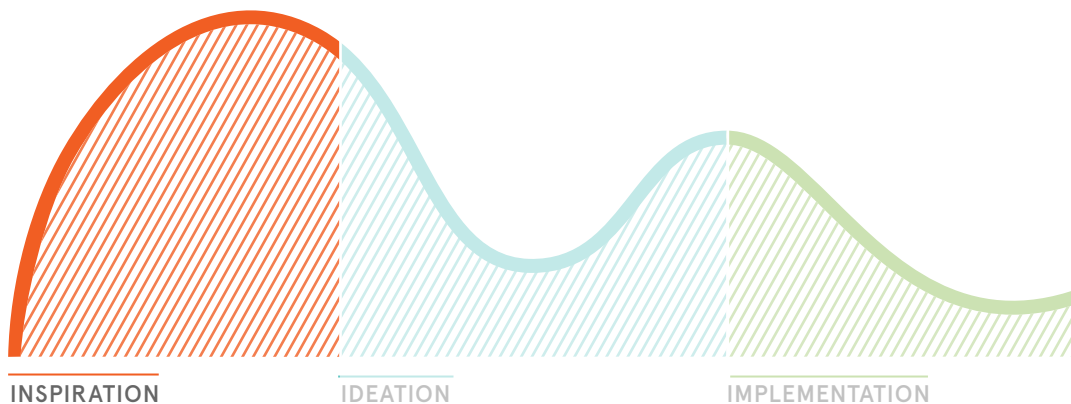
Readings

Overview of Inspiration Phase

- Step 1: Choose a Design Challenge
- Step 2: Plan Your Research Methods
- Step 3: Build Your Interview Guide
- Step 4: Additional Research Methods
- Step 5: Capture Your Learnings

Case Study: Vroom

Methods in Action



Overview of the Inspiration Phase

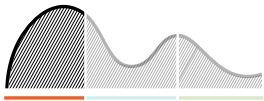
Creating meaningful solutions begins with gaining a deep understanding of people's needs.

In the Inspiration phase, you'll learn directly from the people you're designing for as you immerse yourself in their lives and come to deeply understand their needs and aspirations. The Inspiration phase is about learning on the fly, opening yourself up to creative possibilities, and trusting that as long as you remain grounded in desires of the people you're designing for, your ideas will evolve into the right solution.

Step 1: Choose a Design Challenge

As part of this course, you will either be selecting one of three precrafted design challenges or you'll be scoping your own challenge. You'll spend time with your team to select the design challenge that you wish to tackle and then create a common understanding of what you are working toward.

INSPIRATION



Collect Thoughts

As a team, your first step will be to talk about the design challenge you choose to work on. You'll collect and write down thoughts about your challenge. Your team will discuss how you can refine the challenge if it feels too broad, or too specific.

Review What You Already Know

Chances are good that members of your team will have some knowledge about the design challenge you choose. It will be important for your team to share what you already know, so you can build upon it and then focus on discovering what you don't yet know.

Define What You Don't Know

You'll also want to write down and share what you don't know or don't yet understand about the challenge. And remember, an important part of human-centered design is embracing your beginner's mind. It's not a bad thing if there are aspects of the design challenge that you don't yet grasp.

Review Constraints or Barriers

Your team will review a list of constraints or barriers that might prevent you from tackling the design challenge. You'll also brainstorm solutions for overcoming or working around these barriers.



This design team working on reproductive health in Zambia spent time as a team reviewing their assumptions, knowledge of existing barriers, and questions of things they didn't know, before heading to the field.

Step 2: Plan Your Research Methods

Research is the fuel for your ideas. During the Inspiration phase you'll want to plan research activities to learn from the people you're designing for and explore unfamiliar contexts. As part of this course, we've selected four good starting points—learn from people, learn from experts, immerse yourself in context, and seek analogous inspiration.

A. Learn From People

This team working on improving urban food security in Nairobi gathered information from vegetable sellers at a local market.

Human-centered design is built upon deeply empathetic research. It's spending quality time with people to gain insight about and inspiration from the people you're designing for. But learning from people requires practice and preparation. Here's where to start.

This Gives You

In-depth insight into people's needs and motivations.

Keep in Mind

Experts are everywhere—and you don't need a degree to be one. Treat your interviewee as an expert. You're interviewing them about their life, and in that, they are the expert. Be curious and always give them the respect they deserve.

Define Your Audience

Before you dig into your research, it's critical to know who you're designing for. Think about the people or groups that are directly involved in or reached by your challenge, and then add those who are peripherally relevant. Those are the people you want to talk to.

Extremes & Mainstreams

When recruiting people to interview, target both the big broad mainstream and those on either extreme of the spectrum. An idea that suits an extreme user will nearly certainly work for the majority too. More importantly, talking to extremes can spark creativity by exposing you to use cases that you'd never have imagined on your own.

Plan Logistics

Think about what exactly you want to do with each participant. Where do you want to meet them? How much time will you spend with them? Is there an activity you can do together to enrich conversation? What will you ask them to show you?

Recruitment Tools

It's important to have a strategy around who you talk to, what you ask them, and what pieces of information you need to gather. Don't be afraid to tap into your personal network: people are generally happy to share what they know, particularly if you tell them that you are learning a new design process for creating positive social change in the community.

Create a Trusted Atmosphere

Start the conversation on a casual note. Talk about a subject that is unrelated to your research first to make the interviewee feel comfortable. Be considerate of the space you are in and make sure you have an appropriate level of privacy.



CAPTURE...

Pay Attention to the Environment

Try to meet in the person's context—in their home, office, or workplace. This will help you get a better sense of what's important to them. During the conversation, be curious about the environment. Ask about objects or spaces you find interesting, and if you sense the person might be willing, ask for a tour.

Capture Quotes

During your interview, capture important quotes directly rather than interpreting what you think the person is saying. Later, when sharing back with your team, you'll have a more accurate record of who the person is—on their terms, in their language.

Take Photographs

Photographs help you remember who you talked to and what you saw. Photographs taken during your interviews will make your research more visual, meaningful, and easier to recall and navigate. But make sure to ask interviewees if it's OK to take photographs, and never use those photographs for anything beyond internal project use.

B. Learn From Experts

When designing a campaign for early learning, this team talked with an expert in child development who is working a continent away.

Though human-centered design is all about talking with people, there are moments where you'll need more context or history than a typical interview can afford. This is where both expert interviews and secondary research come into play.

This Gives You

Access to in-depth knowledge in a certain area of expertise.

Keep in Mind

Find the balance between using experts to get a good understanding of the current situation and preserving space to think beyond the existing models.

Expert Interview

Experts can often give you a systems-level view of your project area, tell you about recent innovations—successes and failures—and offer the perspectives of organizations like banks, governments, or NGOs. You will want to choose experts based on your objective. Are you looking for someone with a radical opinion, or do you want to gain a more historical overview of what's worked and what hasn't? Get a few different perspectives to balance out your information. You might also look to experts for specific technical advice.

Plan For The Conversation

Ask smart, researched questions and plan how you want the conversation to flow. Though you should come prepared with an idea of what you'd like to learn, make sure your game plan is flexible enough to allow you to pursue unexpected lines of inquiry.

You could even consider asking the expert to actively help you work on an early concept.

Using videoconferencing tools like Skype will allow you to share and build on visual concepts in real time.

Secondary Research

Social sector challenges can be really thorny, which is why secondary research, whether done online, by reading books, or by crunching numbers, can help you ask the right questions. A firm foundation of knowledge is the best place from which to tackle a design challenge. Try to find recent innovations in your particular area. They could be technological, behavioral, or cultural. Better yet, take a look at other solutions in your area. Which ones worked? Which ones didn't?

C. Immerse Yourself In Context

A team designing new ways to improve clean cookstove usage in Tanzania spent an entire Saturday with a local family cooking a meal.

The Inspiration phase is dedicated to hearing the voices and understanding the lives of the people you're designing for. There's no better way to understand the people you're designing for than by immersing yourself in their lives and communities.

This Gives You

Skills for learning from what's around you.

Keep in Mind

Approach your observation with an open mind and imagine this as the first time you have gone through this experience. Look for details you may have overlooked before.

Plan Your Observations

The best route to gaining an understanding of the people you're designing for is to see in person, where they live, work, and lead their lives. Choose an experience that can inform your challenge. For example, if you are looking for new ideas on ways to provide healthier food options for people in need, you might visit a low-cost cafeteria or fast food restaurant during the lunchtime rush. Wait in line, order a meal, and observe the space as you eat. If you have the opportunity, you can learn a lot by shadowing someone for a few hours.

Capture What You See

It's easy to interpret what's in front of you before you've fully understood it, but first be sure you're taking down concrete details and quotes alongside your impressions.

Think of certain aspects you want to capture, such as:

- Map out the different parts of your experience from beginning to end (we call this a "customer journey").
- How did you feel at different parts of the experience?
- What was unexpected? Challenging? Seamless?

Reflect on What You've Observed

Immediately after your observation, take some time to reflect upon the moments you found most interesting. Capture them on Post-its or in your notebook so you will be able to share back with your team in a way that is accurate, vivid, and visual.

D. Analogous Inspiration

When helping surgical teams deal with complex procedures, designers looked at how car racing pit-crews optimized their workflow for safety and efficiency.

You're probably familiar with what an analogy is: it's an associative thought-process that allows you to transfer meaning from one subject to another. Analogous research takes inspiration from a different context to give you a fresh perspective.

This Gives You

A new perspective on the challenge you're working on, as well as inspiration and energy.

Keep in Mind

Explore with an open mind, even if you do not immediately understand how to apply your experiences. After you regroup, spend time relating what you found interesting to the challenge you're tackling.

Brainstorm Analogous Experiences

Start with a large sheet of paper, and list the distinct activities, behaviors, and emotions you're looking to research in your own design challenge. Next to each one, write down a setting or situation where you might observe this activity, behavior, or emotion. For example, when one of our teams was designing an online college experience, they narrowed down one objective to learn how to create a sense of community. This team sought out and interviewed a former Navy SEAL to understand how they structure bootcamp to create intentional bonds amongst recruits.

Make Arrangements

If you want to talk with people while in a private (as opposed to public) space, it's best to get permission. For example, if you're going to a hotel for inspiration and want to interview staff or take pictures of the space, speak with a manager ahead of time.

Just Take It In

Don't worry too much about making sense of the experience in the moment. This part of inspiration is all about gaining learnings from unexpected places and experiences. In fact, your design team may find it helpful to keep an eye out for analogous experiences throughout the process, not just in the Inspiration phase. Later, it might influence your project in ways you never imagined.

Step 3: Build Your Interview Guide

Having a good conversation with someone you don't know isn't always easy. When speaking with research participants, you first have to help them feel comfortable. It might seem odd, but conducting an interview with a casual tone and feel requires rigorous preparation. Here's where to start.

Identify Objectives

As a team, think about the goal of your design challenge. Ask yourselves some basic questions: Why are you doing the research? What are you trying to find out? Who are you going to talk to or observe? Know that the most valuable part of creating a discussion guide is the thinking that goes into it.

Brainstorm Questions

When writing your guide, think about the kind of feedback that's going to be most useful and inspiring. Interview guides should not be seen as scripts for the observation, but rather guide rails to make sure you stay on track. Make questions easily scannable so you can maintain more eye contact with your interviewee.

Organize Your Questions

A good rule of thumb is to open with some general questions, then go deep. This will give your interviewee time to get comfortable with you. Here's some helpful guidelines:

- **Open General:** Gather basic demographics first. Ask people their age, what they do for a living, if they have children, etc. Begin with questions your participants are comfortable answering. For example, if you are designing new savings products, you might ask people to make a list of all of the things they purchased yesterday.

- **Go Deep:** Ask more profound questions about hopes, fears, and ambitions. It's best if these questions are open-ended, but relate subtly back to your design challenge. For example, if you were working on a project related to saving money, you might ask someone to draw the five big things they're saving money for over the next ten years and how those things fit into their life goals.

Word Questions Strategically

Frame questions in an open-ended way. This helps you to further explore your challenge and elaborate on interesting themes you discover during the conversations. Try:

- "Tell me about an experience ..."
- "What are the best/worst parts about ...?"
- "Can you help me understand about ...?"

Encourage people to tell you their whole story and avoid questions that lead to just a yes/no answer.

Use Tangible Conversation Starters

It can be helpful to share early ideas or concepts in your conversation, particularly when you are working on an abstract challenge. You can create a sketch, build a simple cardboard representation, or describe a scenario to elicit a reaction or response from participants. These are called conversation starters.

Confirm Your Plans

You should confirm date, time, and location for your research activities. Agree on logistics, including transportation, with your team. Can you conduct your research during the Class 2 Workshop? Consider scheduling Class 2 on a weekend so that your team has more time to talk with and meet people. We encourage you to take as much time as you need for the research activities. Don't feel like you must complete Class 2 within the allotted workshop time.

Assign Roles

As part of your field research, you'll designate one person to lead the conversation and a different team member to take notes. Remember to encourage them to write down direct quotes and capture the details we've outlined on page 6. The team should also select someone to photograph your interview subject and the surrounding environment. Make sure you ask for permission before taking any photos. It's often best to build trust with your interview subject before asking to take photos, so you may want to leave this until you've finished the interview.



RESEARCH TIPS

Establish Trust With Participants.

- Listen patiently. Do not interrupt, and allow for pauses to give participants time to think.
- Use nonverbal gestures, such as eye contact, nodding, and smiling, to reassure participants you are engaged and interested in what they are saying.

Encourage Participants To Show As Well As Tell.

- Have participants draw what they're talking about. Visuals often prompt more conversation.
- Try asking "why?" in response to five consecutive answers.

Know What To Look For.

- What people "say" is often different than what they actually "do." Look for cues in the things that people keep around them or the way they carry themselves.
- Notice workarounds that people have created in order to make a system or tool serve their needs better.

Capture What You See.

Take lots of notes and photos of what you see, hear, feel, smell, and taste during a field visit. Capture direct quotes when possible. Write down immediate thoughts without worrying about interpretation.

Step 4: Additional Research Methods

Though likely difficult to explore given the time constraints of this course, these are some other methods we use at IDEO.org to gain a deeper understanding of the people you're designing for. Just some food for thought!

Personal Diaries

Ask participants to reflect at the end of the day on certain moments or themes. This gives them time for personal and uninterrupted thinking, and gives you an interviewee's thoughts captured in their own words.

Use this when: You want to get a longer view of a participant's experience over an extended amount of time.

Photo Essays

Give participants a disposable camera and a list of objects and/or experiences to photograph throughout their day. This gives you a firsthand, visual perspective about your participants through things that are important to them, or are part of their everyday lives.

Use this when: You want to compare and contrast the different daily experiences and realities of a set of participants.

Customer Journey

Have participants create a personal timeline of an experience, then have them map how they felt at different points along the way. Use the map as a visual jumping off point for conversation.

Use this when: You want to discuss a complicated system or series of interactions with a participant. (The process of buying a car is a good example.)

Card Sorts

Create a series of cards with a single word or image on it and ask participants to prioritize what's most/least important, interesting, or relevant to them. Ask them talk through their decision process during this activity so you can understand why they make the choice they make.

Use this when: You want multiple participants to narrow down a set of ideas.

Concept Provocations

These are a series of concept drawings with accompanying explanations. Concepts could be outliers meant to elicit a strong reaction, or early ideas you might want to build into prototypes.

Use this when: You want early feedback on why participants like or don't like certain features.

Step 5: Capture Your Learnings

It's easy to feel overwhelmed by the amount of information you have gathered after an interview, so use a few minutes immediately after the session to capture what you've observed, as well as any new ideas you have as a result.

Take Time To Regroup

Plan extra time so that you can share your thoughts and impressions with your teammates right after your interview or observation. This may often happen in a coffee shop or while in transit.

Share Your Impressions

What are the things you found most interesting during the observation? Listen to each others recollections. Compare experiences and impressions, but don't worry about interpreting these stories yet.

To cover the most important topics, consider using these prompts:

- Sound bites: What were the most memorable quotes that people heard? Why were they memorable?
- Interesting stories: What was most surprising to you?
- Interactions: What was interesting about the way he/she interacted with his/her environment?
- Remaining questions: What questions would you like to explore in your next conversation?

Illustrate New Ideas

Did the observation spark a new thought or idea for you? Sketch it out. Don't worry about the way your sketches look or feel intimidated about being visual. These illustrations will help you communicate your ideas to others and give you all a head start on brainstorming concepts.

Case Study: Vroom

A Human-Centered Take on Early Childhood Development



Advances in neuroscience and child development confirm what many educators have long believed: Children’s readiness for kindergarten (and life beyond) hinges on positive engagement with their parents and caregivers during the first five years of their lives. This is the most active period for brain development—children’s brains form new connections at a rate of 700 synapses per second. But as a society, we underinvest in children and families during the earliest years, leaving far too much opportunity on the table. For low-income parents, who may have lacked good models themselves, much of the parenting advice is unattainable. The Bezos Family Foundation and IDEO.org set out to activate engagement through new tools and messages, and to broaden the prescription beyond commonly heard (but not uniformly embraced) directives about reading to children. Could there be a way to communicate brain science directly to parents in ways that positively influence behavior, and raises the value of all forms of positive interaction with babies and toddlers?



The Outcome

After extensive interviews with parents, child development experts, and pediatricians around the country, the team developed a large-scale messaging campaign celebrating everyday moments as learning opportunities. Whether sitting in the laundromat or shopping at the supermarket, the fundamental message was that taking advantage of the many chances to engage with a child strengthens the foundation of that child's brain development. The Bezos Family Foundation built upon our design team's key insights, further developed them, and in the spring of 2014, launched Vroom. Vroom advocates for the time parents do have and using it in different ways to help build their kids' brains.

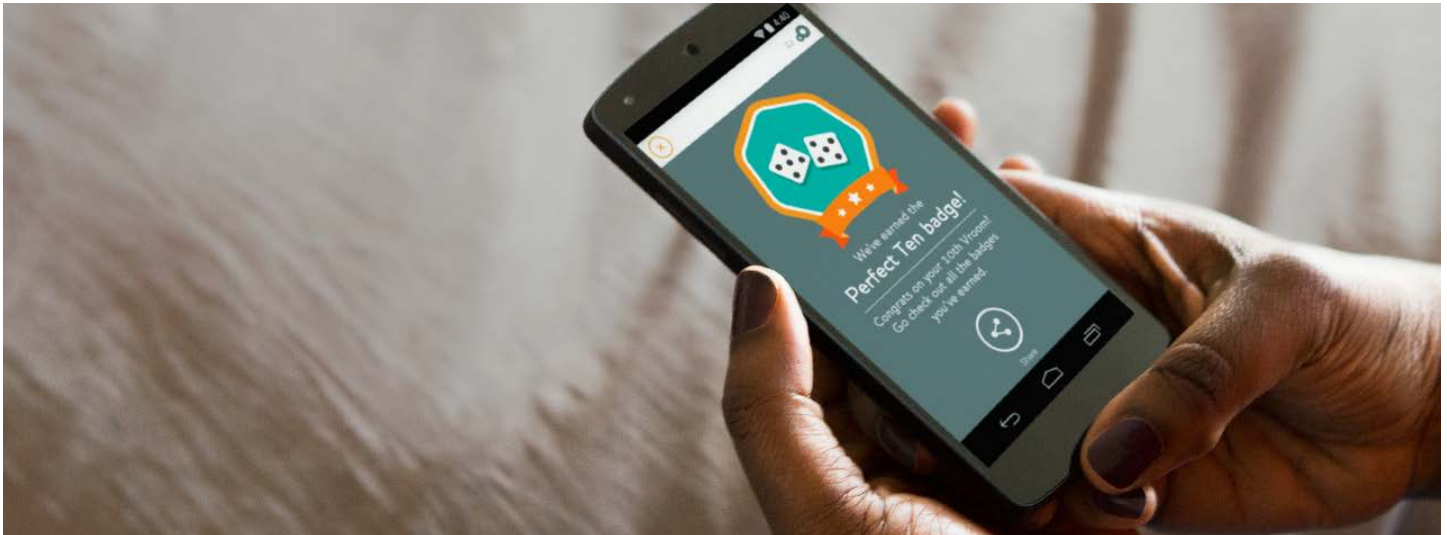
INSPIRATION

The IDEO.org team undertook a highly immersive inspiration phase, visiting low-income communities in California, New York, and Pennsylvania to conduct interviews with parents and to observe existing programs aimed at improving child development outcomes. The team learned that many of the parents they met had had very tough upbringings. These parents didn't feel fully equipped to engage with their children, because their own parents didn't engage with them. One of the most successful programs the team witnessed during their research was one in which nurses went into people's homes for several hours each week simply to play with the children in front of the parents.

By modeling play, they were able to affect behavior change and shift the parent-child dynamic.

Interviews with child development experts and pediatricians tended to reinforce the direct findings: If parenting advice is limited to reading books, those who don't feel comfortable reading aloud may forego all forms of engagement. One pediatrician in New York argued outright that playing, talking to, and responding to children trumps reading.

In the end, immersion turned out to be absolutely critical to the design team devising innovative solutions. Because the designers found themselves working on behalf of communities that are quite different from them, they had to push the boundaries of their own empathy, but in



doing so, they came to really understand the needs of low-income parents.

To the delight of the individual team members and to the benefit of the project, this approach eventually led to open doors in the participating communities. By immersing in the neighborhoods and communities they were looking to serve, the team established trust with a core group of individuals who then told their neighbors and referred friends, creating the critical mass necessary for understanding the audience and building the right brand voice.

IDEATION

When field research was complete, the team returned to San Francisco to synthesize its findings and look for patterns among the interviews. As they synthesized everything they learned, the team began to formulate a voice, identity, and set of design principles for the campaign. They came to some core principles that still guide Vroom today, ideas like Speak in the voice of their peers, Withhold Judgment, and All parents want to be good parents.

The team came up with a series of personas, each of them representing a woman from the communities being served, then invited mothers to the office to review mood boards, listen to sample voices, and

provid feedback on which character they'd trust for advice on child-rearing.

From this feedback period, the team discovered that most parents, though they weren't drawn to an academic approach to engaging their children, were very interested in the science behind behavior and brain development. Through a host of interviews, the team heard parents talking about a eureka moment after meeting with a neurologist who explained how the science worked. It was a revelation that had a big impact on how they saw their role in bringing up their child.

IMPLEMENTATION

By the end of the Inspiration and Ideation phases, the IDEO.org team had created a strong, well-defined creative brief that could be handed to an advertising agency and used as the foundation for a major campaign. They came up with provocations and prompts for people to play with their kids as well as an advertising strategy that included guerrilla interventions displayed in laundromats instead of on big billboards. After another couple years of refinement and more design work, the Bezos Family Foundation launched the pilot of Vroom in 2014 in King County in Washington State.

Method in Action: Immersion



In 2012, IDEO.org began work on a project with the Global Alliance for Clean Cookstoves, an organization that seeks to advance the global market for clean cookstoves. A compelling technology, clean cookstoves have the potential to improve health by reducing exposure to smoke from traditional fires and stoves, improve livelihoods through increased savings from reduction of fuel use, and help the environment via a decrease in carbon emissions. Emily Friedberg, a designer on the project, wrote about a day spent cooking with a Tanzanian family as part of her team's Inspiration phase research.



Given language and cultural barriers, it's relatively difficult to really get to know people in Tanzania in a short amount of time. To remedy this situation, our IDEO.org cookstoves team arranged to spend an entire day with one family, casually hanging out and cooking an afternoon meal.

Daniel and Gaudensia welcomed us into their family of nine in the Tanzanian town of Buhongwe. Our first stop was the market where we bought everything we needed for our feast including meat, beans, sweet potato, ugali flour, fruits and vegetables, and... a live chicken.

When we got home, the ladies quickly got to work lighting the three charcoal stoves and cutting up the meat and vegetables. The oldest boy, Godwa, was told to slaughter

the squawking chicken. Cameras ready, we watched as he cut through the bird's neck, drained the blood, and left the carcass twitching in a bowl ready for plucking. The meal took several hours to prepare. There was swapping of pots and lids, lids doubled as cutting boards, and each item including water and the chicken went through several discrete processes before it reached the table. And when it was done, three hours later, it was elaborately dished onto plates for the men and the guests and eaten out of cooking pots for women and children, and all consumed in the space of 20 minutes.

And then, when it was cleared, they lit the charcoal stove again and started preparing for dinner.