

DESIGN:FOR DELIGHT

PLAYBOOK

A guide to everyday innovation

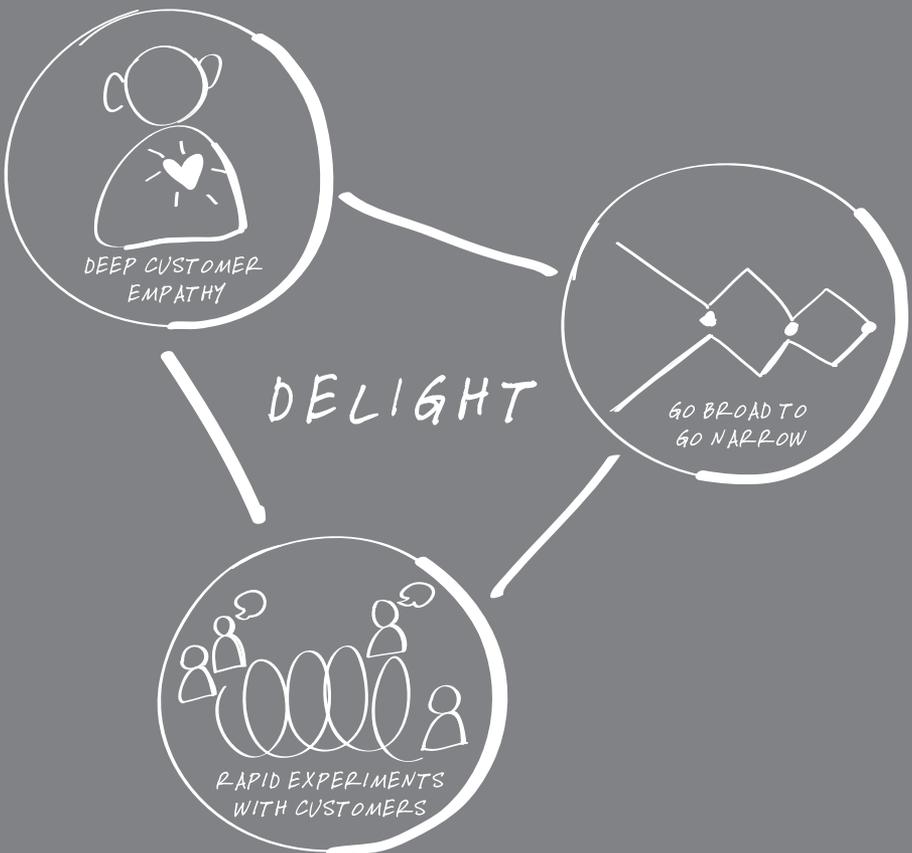
intuit® Education

DESIGN FOR DELIGHT

Intuit's #1 Innovation Capability

Design for Delight's goal is to help businesses create awesome solutions that their customers, employees and partners will truly love. When we create solutions people love, it dramatically improves our businesses, our lives and ourselves.

"Design for Delight" is a set of principles which describe how we innovate at Intuit. Each principle includes a variety of techniques which can be used to improve the chances of success when exploring new ideas, improving our products or working better as a company. Anyone can learn these principles, and anyone can use them to improve the world around them.



WELCOME

Thank you for joining us for this Design for Delight workshop. Intuit has experienced great success using Design for Delight to improve our products, and our hope is that you will discover how to do the same to improve your work.

Finding time and resources to explore new ideas is tough. This workshop will inspire you to be bold, think creatively, and help you learn how to try new ideas.

Design for Delight will help you:

Explore creative ideas

Explore new, more efficient ways to connect with the people you serve or work with - your customer

Explore new ways to manage your time - Explore how you might spend more time on the things that matter most to you

TODAY WE WILL...

- Meet new people
- Learn Design for Delight skills
- Practice these skills
- Have fun!

DEEP CUSTOMER EMPATHY

Gaining empathy for our customers, our partners and ourselves is a powerful form of inspiration.

By understanding people more deeply, we can identify their needs and desires in ways they can not articulate. We can use this understanding as the basis for developing new ideas, new solutions, and new ways of working together. Great ideas start with knowing people better than they know themselves, and acknowledging that customers are the single source of truth.

There are many techniques for gaining empathy, most of which can be captured in three high level principles: 1) observing real behavior, 2) asking probing questions, and 3) following up on the surprises and "reasons why". The secret is to observe real customers when they are experiencing the pain you wish to learn about, then listen and savor the inevitable surprises you encounter.

A few suggestions to get you started:

Watch a demonstration - Don't be shy to ask people if you can observe how they do things for real, since observing real behavior often reveals surprises. For example, ask "Can I watch you shop for a gift online?"; or "Show me how you purchased a recent gift."

Ask open-ended questions - Open-ended questions get people talking, focusing the conversation on what is most important to the customer. For example, asking "Tell me about the last time you purchased a gift for someone special" is a better question than "Have you ever bought a gift?"

Encourage stories - Stories reveal how people think and feel about the world, revealing clues about behavior, and giving you an opportunity to ask follow-up questions. Get customers talking, then sit back and listen!

Ask why, why, why - Why people do or say things, what they were hoping to accomplish, and why those things are important in their life. "Why" is often the source of profound inspiration for our ideas. Repeat your questions multiple times to make sure you get to the root cause.

CUSTOMER INTERVIEWS

Behaviors show us what people do, but not why they do them. Deep probing interviews are one good way to understand why people behave as they do. Interviews are best when used to understand behaviors that just occurred, like why a person just started a trial, or why a person recently stopped using a product. Proximity to the actual behavior is important—strive to do them as close to the behavior you want to understand as possible.

How to do it: The first things customers say are all too often not the real reason or root cause. It can take repetitive probing to get to the real answer or root cause. That's why we have to keep probing, at times even repeating almost the same question.

1. Decide what behavior you want to understand (for example, why are customers canceling their subscriptions).
2. Find a source of people right in the moment or right after the moment of that behavior - ideally within minutes or hours. (for example, how to get the names and phone numbers of customers when they cancel their subscription).
3. Ask deep probing questions about the behaviors of interest.

Time: 45-60 minutes per customer

Watch out: Interviews, even deep probing ones, are not a substitute for observing actual behaviors.

PRO TIPS

Build rapport. Spend a moment to connect with your customer before asking questions. Use affirmations so that customers don't feel self-conscious.

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

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

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

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

EXAMPLE PROBING QUESTIONS

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

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

General

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

Goal Related

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

Root Cause

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

Confirm

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

FOLLOW-ME-HOME

Observing real behavior is the gold standard for learning what people care about most. Follow-Me-Homes are a fast and easy way to observe people experiencing the problems and pains we hope to solve. By observing real behavior, we gain insights, empathy, and share understanding. We avoid second-hand information which might not be accurate and create opportunities to be surprised.

How to do it: Start by deciding what type of situations or behaviors you wish to learn more about, then identify the people you will observe. Follow-Me-Homes are most often conducted together as a small working team but can also be done “on the fly” as you go about your day.

1. Find someone you can “follow home”. Reach out to your personal network of friends and family, or simply ask anyone who is your target customer.
2. Go to where the person is experiencing the problem. Visit them in their home, office, or anywhere in their natural habitat.
3. Set the context, observe and ask why, then wrap up and say thank you.
4. Debrief with your team. Share observations, pain points, and surprises.

Time: 20-90 minutes (per customer)

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

PRO TIPS

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

Ask them to show you. If they describe something they do, ask for a demonstration to see real artifacts from their work.

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

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

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

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

EXAMPLE FOLLOW-ME-HOME “FLOW”

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

Before you go: Make sure the person you plan to visit...Ask one or two team members to join you, so you'll have multiple perspectives, and help recording what you hear and observe. Respect your customer by arriving on time.

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

You: “Nice to meet you [person’s name]. Thank you so much for taking the time to meet us today. Our goal is to learn more about challenges you encounter when...[topic/problem]. We are hoping to learn from you.”

Observe and dig in deeper (15-45 min)

You: “OK, let’s get started. Can you show me how you...[topic/problem or behavior you are looking to observe].” (Observe and listen)

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

You: “Why did you do it that way?” (Listen to their answer)

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

Clarifying questions you might ask:

Why do you do it that way?

What is good about the process? What do you hate most about it? Why?

What’s the very next thing you do afterwards? What do you do before? Why?

Can you show me exactly how you do it in detail, step by step? Why those steps? Do you mind if I take a quick picture of it (then take picture)?

Wrap up

You: “Wow, [person’s name]. We really learned a lot by watching how you work. We’ll use this information to help improve [problem]. Thanks so much for your time today.” (End the follow-me-home visit)

Debrief as a team

As soon as possible after the Follow-Me-Home, ask to hear your teammates’ observations. You: “OK team, what pain points did you observe? What surprised you most?”

THE CUSTOMER PROBLEM

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

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

1. Go broad, and write down many potential problem statements based on your recent customer empathy. Don't speculate, focus on real problems you've actually observed - see "Pro Tips" below to help.
2. Share and discuss your list of problem statements as a team
3. Go narrow, and select a single problem statement on which to focus
4. Include problem statements in your team's communication

Time: 15-20 minutes

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

PRO TIPS

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

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

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

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

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

CUSTOMER PROBLEM STATEMENT TEMPLATE

I am a: _____

A narrow description of the customer - not you.

I am trying to: _____

Desired outcome

But: _____

Problem or barrier

Because: _____

Root cause

Which makes me feel: _____

Emotion(s)

THE IDEAL STATE

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

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

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

Time: 15-20 minutes

Watch out: Don’t stop with an incremental ideal state, or an ideal state that describes solutions that already exist today.

PRO TIPS

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

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

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

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

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

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

IDEAL STATE TEMPLATE

In a perfect world: _____

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

The biggest benefit to me is: _____

The improvement in the customer's life once the ideal state is achieved

Which makes me feel: _____

Emotion(s)

EXAMPLE: Toyota

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

Toyota's Ideal State:

In a perfect world: Vehicles never break down

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

Which makes me feel: Safe and confident when I drive

GO BROAD to GO NARROW

The best way to develop a great idea is to start with a large number of different ideas.

In our busy lives it's understandably difficult to find time to explore new options to the challenges we face. We often default to doing things the way we've always done it, falling back on old habits and repeating the same ideas even though they don't work.

To break this pattern we need to be creative, be bold, and take calculated risks. We must be intentional about exploring new ideas, which are dramatically different to the way things are today. Only then can we discover the breakthrough ideas required to improve our businesses and our lives.

Once we explore many options, we can then narrow down these options to a single choice about what to do next. This narrow choice will likely be different than what we have explored in the past, giving us new opportunities to learn via our experiments.

A few suggestions to get you started:

Rapid fire - Set short time limits, forcing you and/or your team to generate ideas in a small amount of time. Build on each idea!

Use constraints - Constraints will drive your creativity. Ask "What would we do if we had a million dollars?", or "What if we only had \$5 dollars?" or "What would we do in 24 hours?" or "What idea is most likely to get me fired?"

Zoom-in - Break a large idea into very small pieces, then "zoom in" to only one piece of the puzzle. For example, Twitter began by zooming-in on a single 140 character status update.

Use analogies - Look for inspiration from unrelated industries. Ask, "What is "Uber" for my business?", or "What is the "concierge" version of my product or service" or "What would Ferrari do?"

Use opposites - To get yourself thinking in a new way, ask "What's the opposite of what we are doing today?" or "What would make things worse?"

Brainstorm Ideas

1
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11+

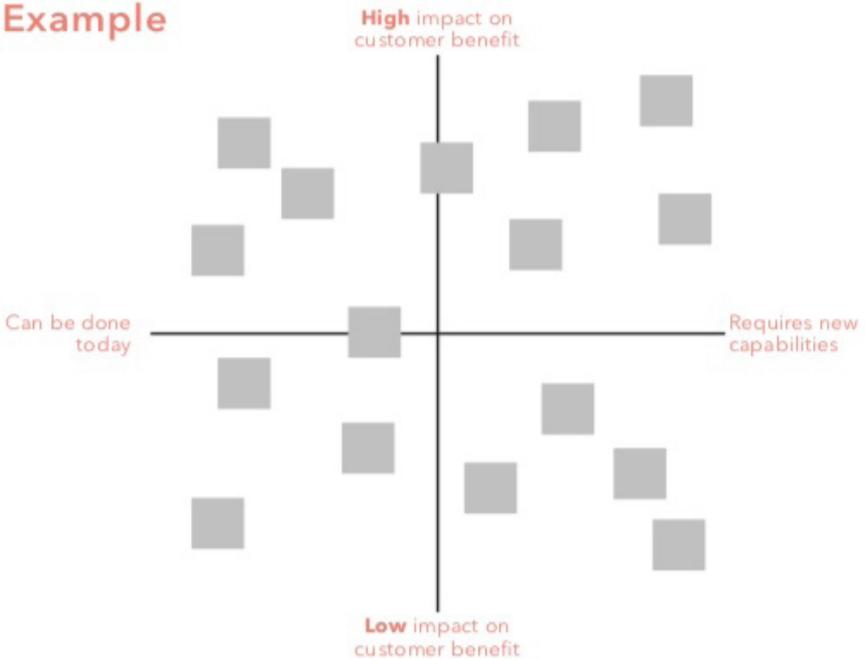
2X2 NARROWING

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

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

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

Example



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

How to create good 2x2 criteria

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

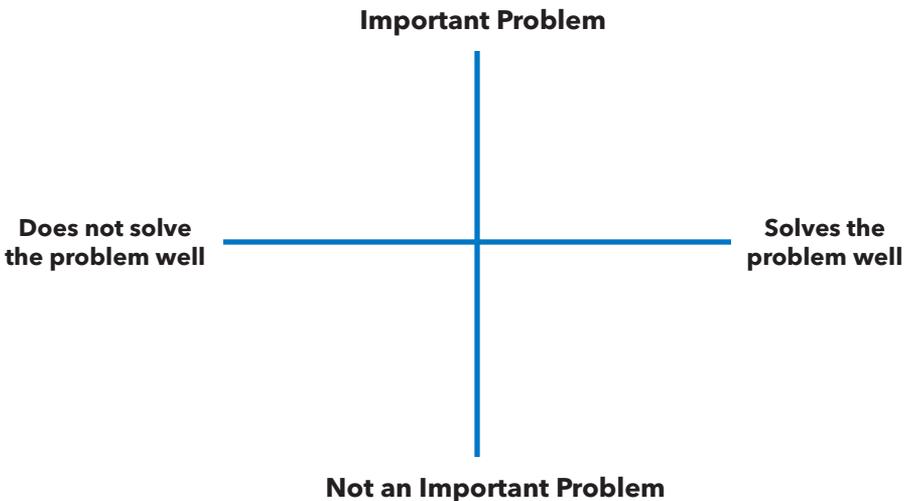
Create real tension between your criteria. If all your ideas are in one quadrant, there's no tension pulling them apart.

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

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

PRO TIPS

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



RAPID EXPERIMENTS

Before you invest time and money on your idea, quickly test whether or not it is likely to work.

We've all had exciting ideas which we invest our time and energy, only to realize these ideas don't end up working the way we expected. Luckily we've discovered a way to avoid this trap, by creating simple, very small scale experiments which test our ideas quickly and cheaply. You'll discover the truth with little investment.

As you run experiments over time, you will generate more evidence for or against your idea. Use this evidence to tell a story to friends, partners, students, teachers, etc. then tweak the idea until it works.

Steps in the rapid experiment "loop"

1. Focus on Leap of Faith Assumptions: *"What do I hope will happen?"*

Your "leap of faith" is the most important behavior that must be true for your idea to work in the real world. These are things you assume it to be true, but have not yet been proven with real evidence.

Ex: "I hope students will learn to be more innovative"

2. Run Experiments: *"How will I quickly test my Leap of Faith?"*

Build the absolute minimum required to test your leap of faith, and nothing more. Write down a hypothesis, run your experiment quickly and be sure to measure real behavior.

EX: "If I teach innovation, 20% of students in this room will go home and run experiments with their own business ideas."

3. Learn & Decide: *"What actually happened and why?"*

Review data and surprises from your experiment. Consider why your hypothesis passed or failed, and what new insights you discovered. Decide on what changes you'll make to your original solution idea, then start the process over again with Step 1.

EX: "Only 12% of participants ran experiments when they returned home. Maybe I should provide more in-depth training over a longer time period?"

Picture Experiment

What was your biggest surprise? Why?

What else did you learn?

What will you do next?

NOTES

HOW MIGHT THESE STORIES APPLY?

SUMMARY PAGE

Your Target Problem

"What problem will you try to solve?"

Your Solution Idea

"How will you solve the problem?"

Your Leap of Faith

"What do you hope will happen?"

Your First Experiment

"How will you quickly test your leap of faith?"

Hypothesis:

When will I get my answer?:

TAKE THE D4D CHALLENGE

TRY IT YOURSELF:

Get inspired, then run experiments.

HOW TO:

STEP 1: Commit to running your experiment!

Get inspired, then choose an experiment to run. Just do it!

STEP 2: Run your experiment!

Just like your example experiment, run a quick test to learn what works and what doesn't.

STEP 3: Repeat Step 1!

Take what you learned and make changes to your idea, then run the next experiment.



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