

UBC STUDIO *for* DESIGN AND INNOVATION

THE STRATEGIC DESIGN METHOD: ASK.TRY.DO.

JUNE 8, 2017

Professor Moura Quayle,
Director *pro tem*, UBC School of Public Policy and
Global Affairs

Policy Studio | UBC
Liu Institute for Global Issues

UBC SAUDER
SCHOOL OF BUSINESS

d.studio

GOAL *and* OBJECTIVES

Goal:

See the big picture – STRATEGIC DESIGN METHOD

Objectives:

1. Introduce the strategic design method as a useful approach to problem solving and solution finding.
2. Apply a Strategic Design Method “technique” to designing a charrette process with “non-designers”.

STRATEGIC DESIGN

Strategic design is an emerging discipline that integrates ***design*** (human-centred research, problem finding, design and creative thinking) and ***strategy*** (systems thinking, problem solving, practical reasoning and planning) techniques.

It has a role in investigating and defining the transitional paths that guide and support innovation processes inside and outside organizations.



DESIGN + BUSINESS ■ DESIGN + POLICY



DESIGN AS PRODUCT: AESTHETIC, PACKAGING AND POLISH (TACTICAL)



DESIGN AS PROCESS: BUSINESS OPERATIONS AND STRUCTURES (ORGANIZATIONAL)



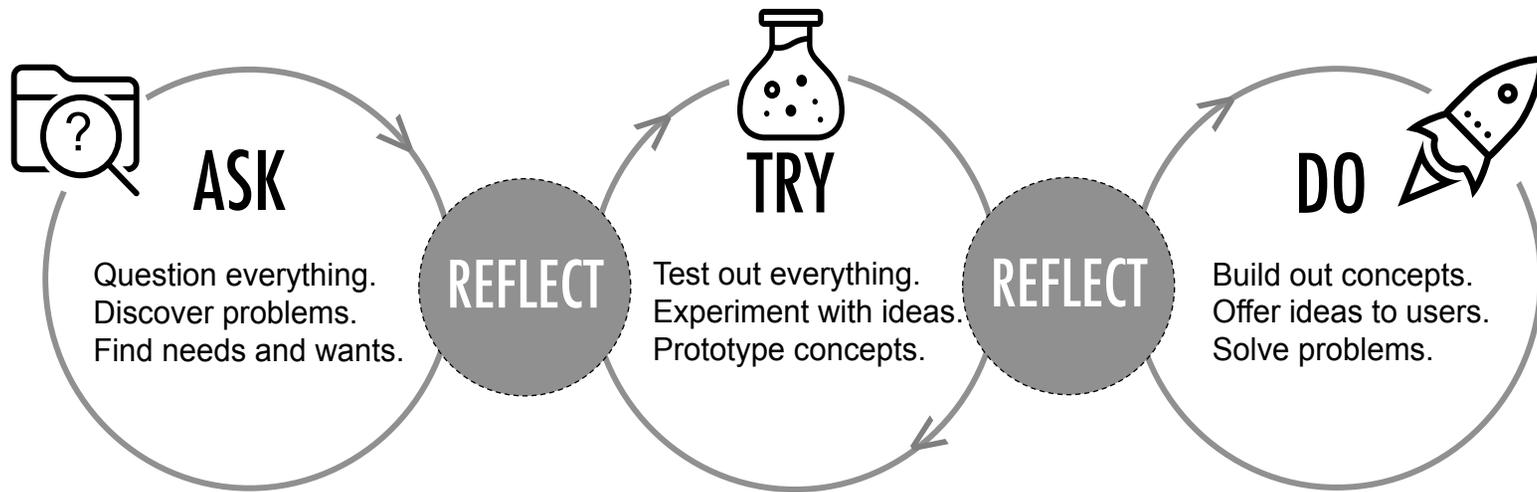
DESIGN AS STRATEGY: BUSINESS MODELS, STRATEGIES AND PLANS (GROWTH)



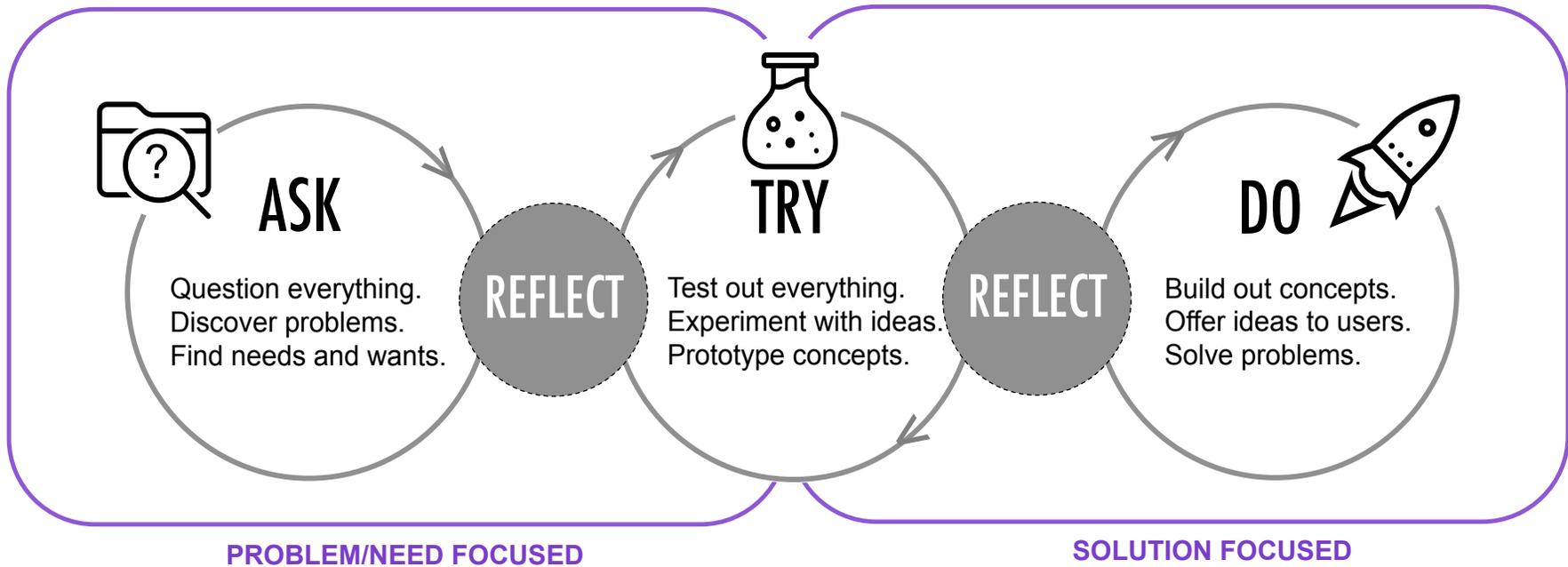
DESIGN AS METHOD TO SOLVE PROBLEMS & CREATE OPPORTUNITIES



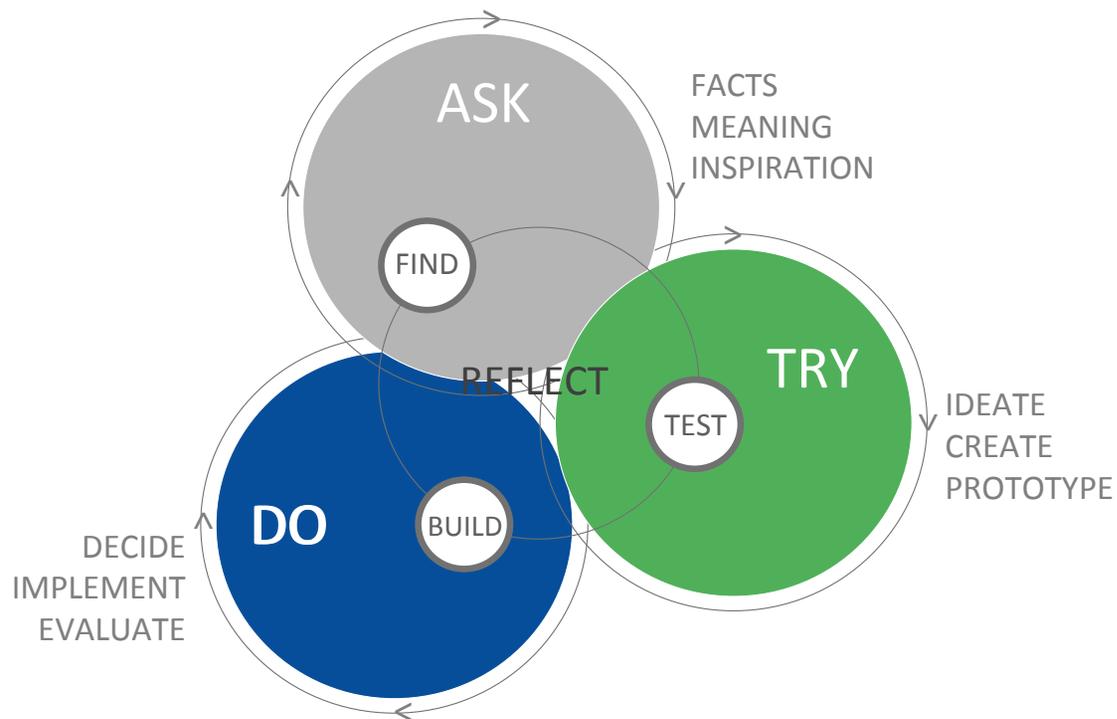
STRATEGIC DESIGN METHOD



STRATEGIC DESIGN METHOD



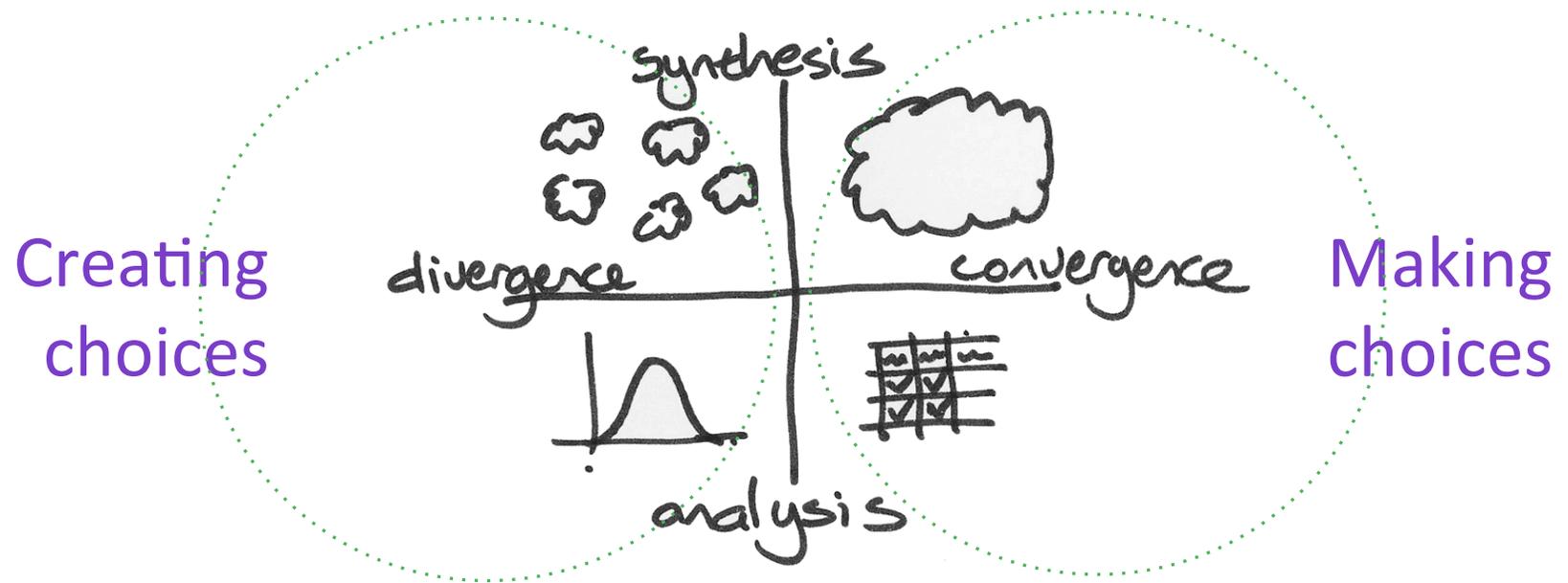
STRATEGIC DESIGN METHOD: UBC D.STUDIO AND POLICY STUDIO



STRATEGIC DESIGN-LED INNOVATION METHOD | MOURA QUAYLE AND ANGELE BEAUSOLEIL ©2015



HOW DESIGNERS THINK



Source: Tim Brown, *Change by Design* 2009

Critical and analytical thinking

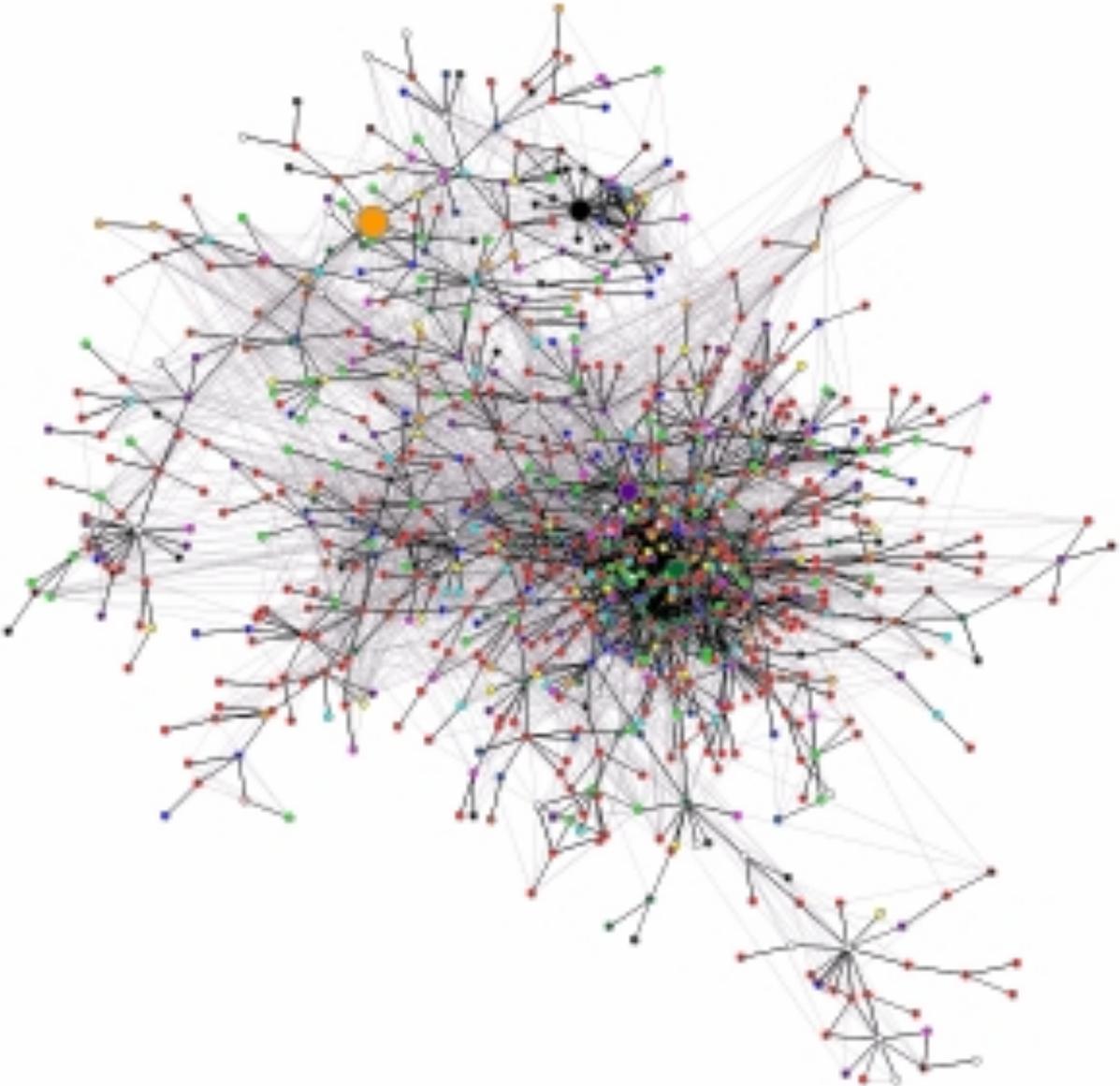
Left brain

I am the left brain.
I am a scientist. A mathematician.
I love the familiar. I categorize. I am accurate. Linear.
Analytical. Strategic. I am practical.
Always in control. A master of words and language.
Realistic. I calculate equations and play with numbers.
I am order. I am logic.
I know exactly who I am.

Creative and systems thinking

Right brain

I am the right brain.
I am creativity. A free spirit. I am passion.
Yearning. Sensuality. I am the sound of roaring laughter.
I am taste. The feeling of sand beneath bare feet.
I am movement. Vivid colors.
I am the urge to paint on an empty canvas.
I am boundless imagination. Art. Poetry. I sense. I feel.
I am everything I wanted to be.



HOW DESIGNERS THINK: STRATEGIC DESIGN

The UBC d.studio and Policy Studio teach future leaders to think creatively and critically:

- How a designer's toolkit can solve big or small real world problems.
- Design processes, thinking strategies and techniques (used for decades in product manufacturing industries) are leading business innovation. Why not policy innovation?
- Focus on clients, consumers and citizens (services or processes).

Creative ideation + Critical analysis + Innovation action

Looking at existing information and systems in new ways.



STRATEGIC DESIGN: EXAMPLES

Organization	From assumption	To new ways....
Lego	Kids are less interested in traditional toys	What is play? What makes kids happy?
Danish prison system	Experts should bring the best ideas to current employee problems	Most of the creative answers were found among the employees Shift from an institutional problem to a community problem
UOT + Red Cross	Limited access to skilled technicians	Providing custom 3D “prosthetics” for Ugandan farmers to get back to work.
City of Bilbao	Industrial recovery	Cultural revival through collaborative strategic design process



CASES: TECH BA [BUSINESS MODEL DESIGN]



MEXICO + CANADA



TechBAV Bus Model: Consultant 'Character'

Magical Morphio

1. Traits (personality and physical)

- Specialist
- Strategic
- Smart, Clever, Confident
- Listener
- Skilled and talented
- Entrepreneurial



2. Motivations (wants and needs)

- Needs to build client base
- Wants to build portfolio
- Wants to help companies
- Wants to change the world
- Seeks new connections

3. Major Challenges and Goal

- Lacks connections
- Seeks to transfer skills to new industries
- Seeks to immerse knowledge into new companies
- Aims to make an impact

Helpful Pat

1. Traits (personality and physical)

- Generalist
- Friendly, nice
- Innovative
- Well resourced
- Collaborator
- Connector

2. Motivations (wants and needs)

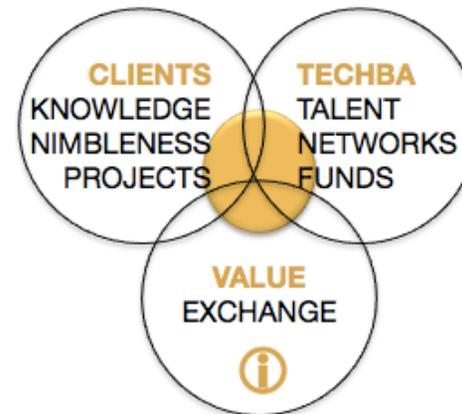
- Wants to be valued
- Wants to share knowledge
- Wants new connections
- Wants to experiment
- Wants to help

3. Major Challenges and Goal

- Lacks time
- Lacks collaborators
- Lacks Mexican market access
- Aims to help and grow companies

9

TECHBA VANCOUVER "BUSINESS INGENIO INTEGRATOR"

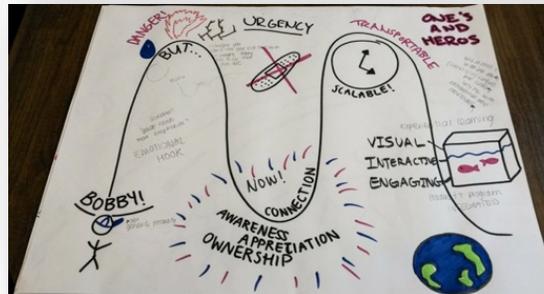
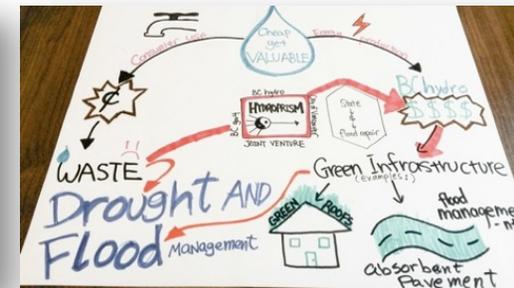
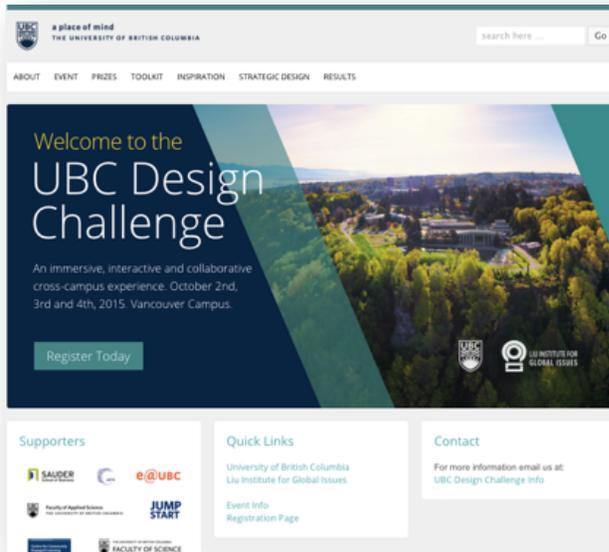


CANADA + MEXICO

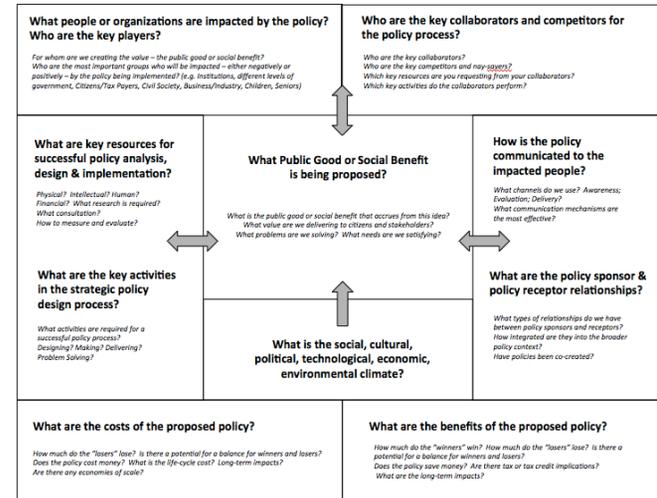
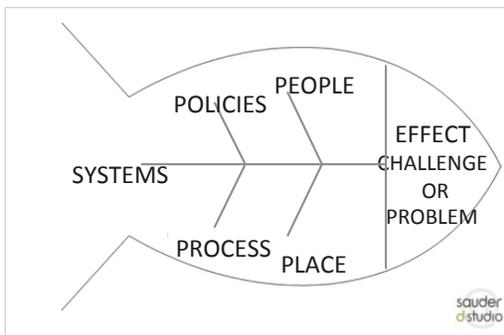
REVENUES < KNOWLEDGE > CAPABILITIES



CASE: UBC DESIGN CHALLENGE

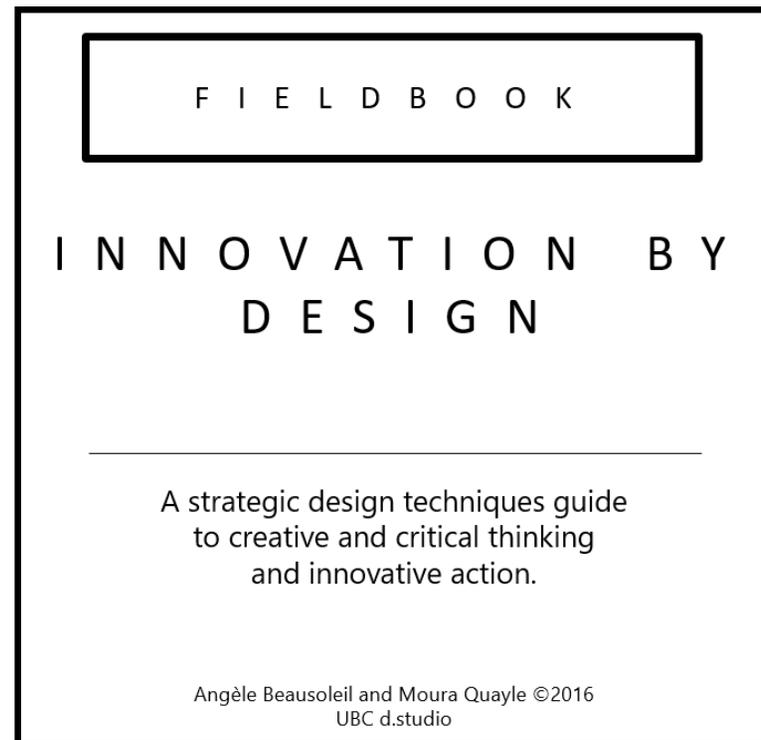


CASE: OTTAWA CHALLENGE [POLICY DESIGN]



INTRO: TECHNIQUE TAPAS

A useful guide for design thinkers, strategists and innovators.



INTRO: TECHNIQUE TAPAS



ASK

Question everything.
Discover problems.
Find needs and wants.



TRY

Test out everything.
Experiment with ideas.
Prototype concepts.



DO

Build out concepts.
Offer ideas to users.
Solve problems.

INTRO: TECHNIQUE TAPAS

ASK



DO



TEAM SWOT

- Identify your team's strengths & weaknesses.
- Explore your team's potential threats and opportunities.
- Simple group assessment technique.



1 Use at the start of a team project. Assess the team members assets. Map to strengths, weaknesses, opportunities and threats.



2 Discuss expertise, experience, passions, and what they would like to learn. Record these.



3 What skills are missing? What opportunities can be pursued as a whole? Reflect on gaps and strengths.



TRY



SCENARIOS

- Convert the abstract to concrete.
- Plan for a future state.
- Generate models for organizations.



1 Identify a situation that comprises a customer/user and their environment.



2 Identify customer/user product or service. Identify context for interaction between user and product. Identify key drivers.



3 Visually map out multiple future scenarios: positive, negative or neutral. Identify key conditions. Reflect.



DECISION TREE

- Identify and define a strategy.
- Explore risks and rewards.
- Problem definition and solving.



1 Present the problem that requires solving. Propose strategies and courses of action. Discuss.



2 Identity and clarify goals and objectives. Identify variables. Discuss and prioritize.



3 Develop a strategic framework that quantifies values and measures outcomes. Decide on actions and tactics.

ASK: INNOVATION INTENT

Innovation Intent | Version 1.0

The problem we are trying to solve

For whom

Why it matters

How other solution attempts have failed

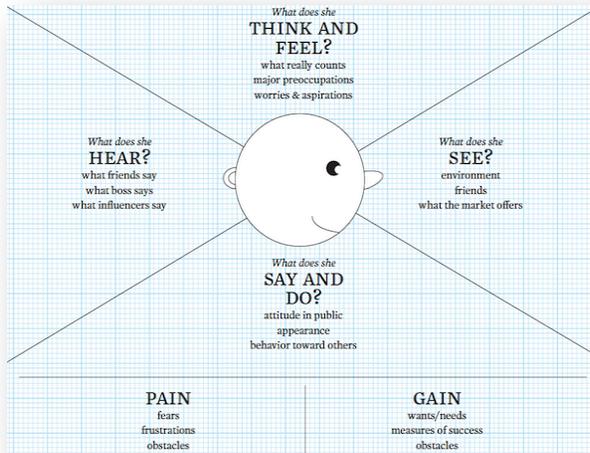
What will make our solution different

ASK: PROBLEM/NEED FINDING

A problem is the difference between an existing state or situation and a desired state or situation. It can be an obstacle to a goal or a question raised for inquiry or consideration of an intended goal. Problems can be presented, discovered or created.

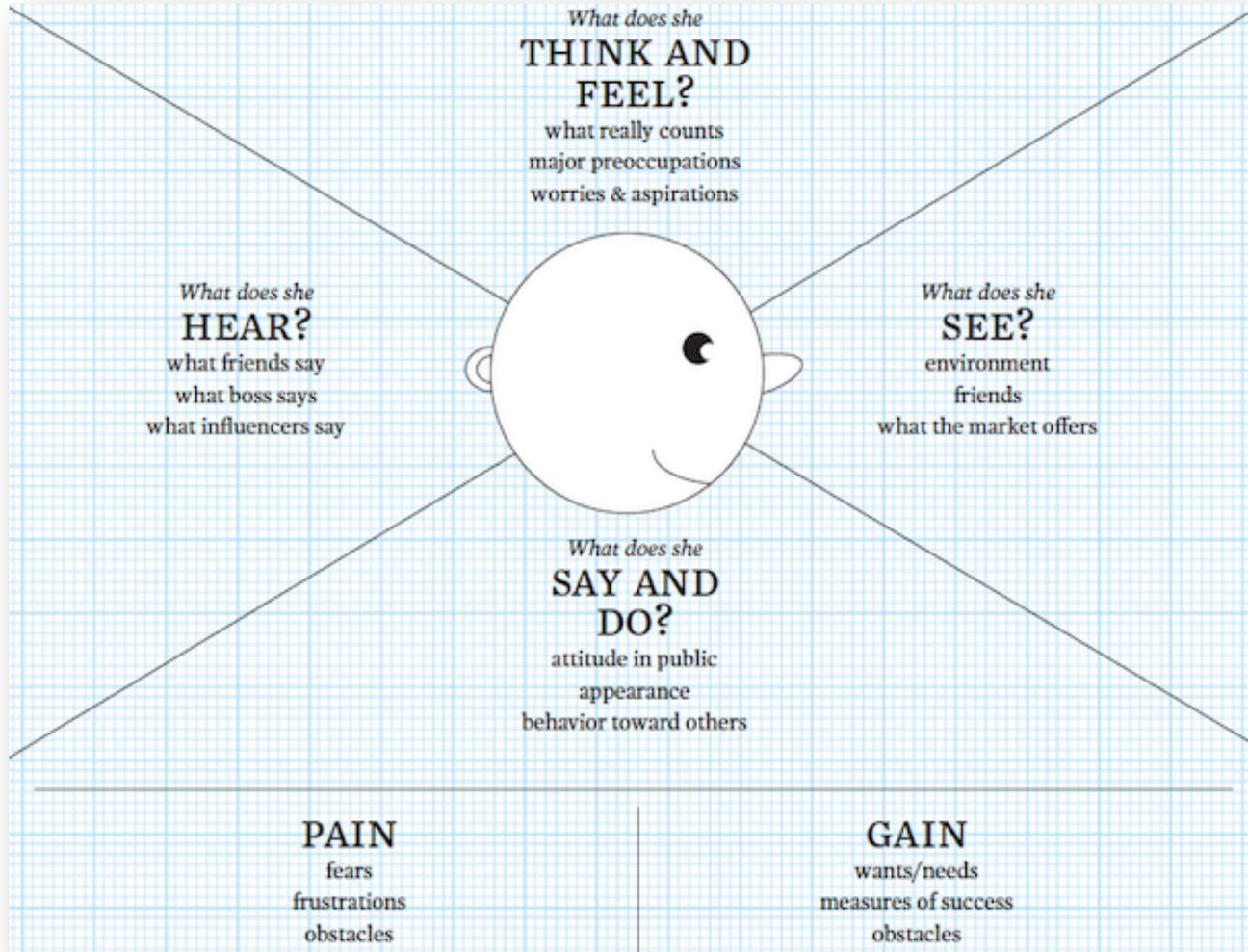
- **Presented problems** are precise and identified, and have a known method to finding a solution (e.g. algebra question). A clear solution exists.
- **Discovered problems** are those that exist and are discovered by an individual or an organization (e.g. crowded classroom). Many solutions have been proposed and used.
- **Created problems** are those that do not exist until an individual or organization invents or creates them (e.g. Galileo raising questions about cosmology). Solutions not yet proposed.

ASK: EMPATHY MAP

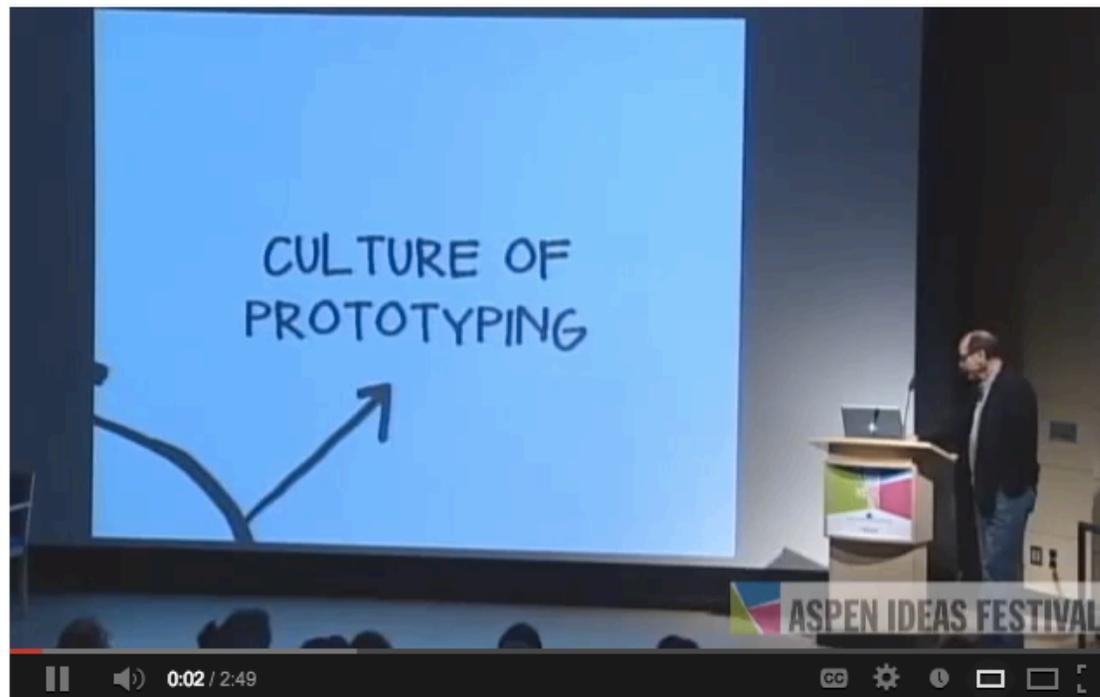


- Designed to generate questions about potential problems;
- Goes beyond the demographic characteristics and develops a better understanding of user/target audience (customers/clients, employees and shareholders):
- What does he **see**? What does she **hear**?
- What do they really **think and feel**?
- What does she **say and do**?
- What is his '**pain**' or 'problem'?
- What will they **gain** or how will they 'benefit'?

ASK:



TRY: PROTOTYPE



http://www.dailymotion.com/video/xjmwqt_ideo-s-david-kelley-on-the-culture-of-prototyping_news

UBC D.STUDIO || QUAYLE AND BEAUSOLEIL © 2017

TRY: EXPERIENCE JOURNEY

PRE-ENGAGEMENT

What program/service are your offering? To whom?

What messages do they hear, see or read about your program?

What are the sources (people and/or channels) of those messages?

ENGAGEMENT

How are they engaging with your program?
(touchpoints)

What is their experience?

- a) Good experience
- b) Bad experience
- c) Neutral experience

POST-ENGAGEMENT

How are you following up with your customer?

What messages you are communicating to them?

What are they saying about the experience? To whom?

How/where are they sharing/communicating their experience?

No one expects to carry a balance (and payment) on their credit card.

50% of Canadians pay their credit card balance in full each month.

Of those who don't pay off their card balance each month, 25% pay it off more months and 40% pay a lot more than the minimum payment required.

Credit cards account for just 5.5% of total household debt.

55% of Canadians believe that consumers have a responsibility to shop around for the credit card that best meets their needs.

Most card users have a good deal of anxiety associated with credit approval.

With the introduction of pre-paid cards, there are options for customers that are not credit worthy.

Aggravated
Carrying a balance on your card is irresponsible. I would never do that. But I had some unexpected expenses and didn't have the available cash to pay it off. I will do it next month.

Displeas'd
Credit cards are pretty much all the same, that's why I focus on the additional benefits. I maintain several to get something back for using your card.

Empowered
I like to have all my banking with one company but I am intrigued by what the others offer. They seem to really want my business.

Active
Service is very important to me. If they don't treat me well now, it's not going to be there when I come back.

Amused
Putting all this financial information together is a pain. If someone would I don't get the correct information, it will be detrimental to my application. I realize how they are going to make their decision?

Inconvenienc'd
This application has been sitting on my desk for a week now. I should have applied online. I would have been by now.

Impatient
How long are you going to take to give me my application? I need to know the status now. I wish there was an easy way to find out what the status was.

Concerned
They have asked me for more info. Oh no! What does that mean?

Excited
My card has arrived. I didn't realize it had all the features it does. I am excited about earning points. I'm proud to carry this card.

Disappointed / Embarrassed
I thought my credit wasn't great, but I thought I would be. I'm not sure what I'm going to do now. I really needed the card.

1 - DISCOVER

2 - CHOOSE

3 - APPLY

4 - WAIT TO HEAR

5 - RECEIVE

JOANNE APPLYS FOR A CREDIT CARD

Joanne's bank offers a 26-year-old and shows an apartment with a friend in Liberty Village. For the last 2 years she has worked for a retail clothing software company. She is in debt with the capability of income coming from her situation. Joanne got a car loan when she was 20 and couldn't keep up with the payments. The bank repossessed the car and her credit rating suffered. Although she would prefer to always pay cash, she now needs a credit card for business travel purposes. She is very nervous about the application process and concerned if she is declined. Joanne wants to appear professional to her clients (the Loan Officer) and is quite confident about her financial state and she would like to be reassured if she was declined.

76.3 Million credit cards in circulation in Canada

60% Has their credit card balance in full each month

269 Card options are available in Canada

3,012 Number of call center credit card inquiries in 2014

5,200 Average number of new applications per year

51% Telephone
42% In-Store

3 Average number of business days for approval

12 Average number of business days for fulfillment

72% Average approval rating 30:1

276 Number of cards from customers who have been declined

1 "Which card is best for me?" - Advertising Direct Mail/Catalog/ Help Joanne make an informed decision specific to her personal circumstances.

2 "A hand is held" - IVS Training: help AIC Company employees direct customers to the right card for them. Relationship Selling for entry level staff.

3 "Collateral calendar" - Re-distributing paper application forms to (a) create more space, (b) increase form size and (c) make it clear what is mandatory information.

4 "Just-in-time Approval" - Reduce wait time for approval to 24 hours in 2015 and to real time by 2017.

5 "Missing Information" - Identify, as part of the application process, conditions under which more information will be required. Capture via website.

6 "Where is not a wait?" - Offer credit card submission tracking application. Track customer on your mobile device status of your application.

7 "Best overall information" - In line of an online tracking app, provide Branch/Call Center staff with access to digital card processing applications.

8 "The first 90 days" - Add 90 card with summary of card benefits and key contact information.

9 "Say no" - Have to decline before its too late and positive. Be clear about reason for decline and provide submission flow to rectify situation.

10 "Say 2" - Add card options for customers who have been declined due to poor payment history where PPI payment is only option.

Exploratorium Visitor Experience Map

Where do you support the paths of different visitors?

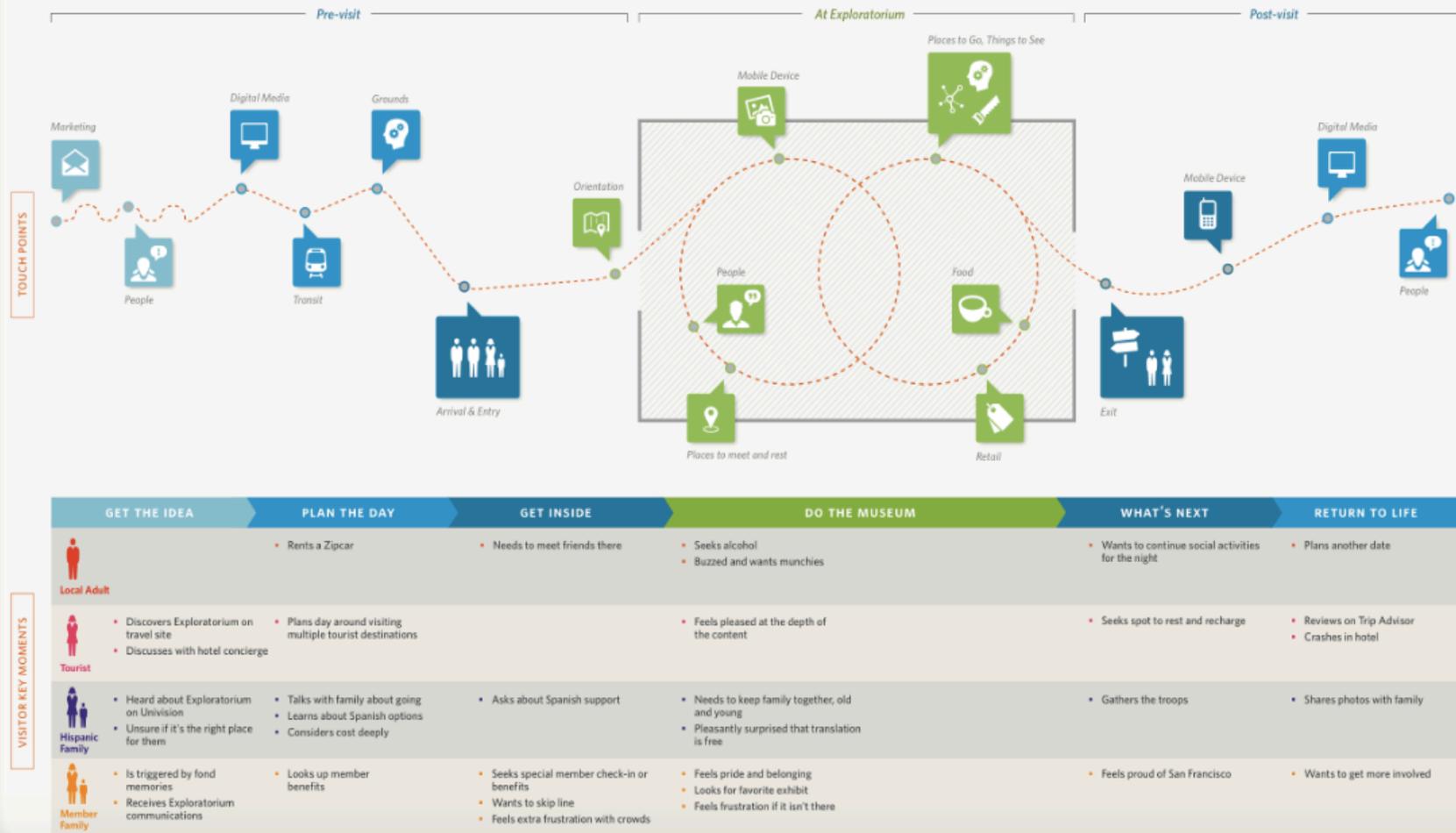


Image: [http://adaptivepath.org/uploads/images/ap_exploratorium_journeymap_2\(1\).png](http://adaptivepath.org/uploads/images/ap_exploratorium_journeymap_2(1).png)

DO: CONCEPT MAPPING

Use as idea generating and sorting technique:

- Combine key observations, insights and factors;
- Generate concepts and ideas based on key factors
- Define criteria for decision-making
- Pursue priority concepts for final prototyping

	cost	complexity	Development Time	Total
Idea #1	3	2	1	6
Idea #2	1	1	2	4
Idea #3	4	2	4	10
Idea #4	2	3	4	9
Idea #5	4	1	3	8
Idea #6	3	4	4	11

4	3	2	1	2	1
Best			Worst	Yes	No



[http://dstudio.ubc.ca/research/toolkit/
temporary-techniques/](http://dstudio.ubc.ca/research/toolkit/temporary-techniques/)

Suggested Strategic Design Techniques for Public Engagement

- Assumption Dumption
- Individual and Team SWOTS
- 5 whys and 6 universal questions
- Eye Phone
- Story Share
- Role Play
- World Cafe

TECHNIQUE: ASSUMPTION DUMPTION

- A simple exercise where you state your assumptions about a situation or the problem.
- Generate a rich discussion = understand each other's point of view and explore the origins of those beliefs.
- By “unpacking” assumptions, it helps the team dive more deeply into the problem to discover its true source.
- Reversing assumptions = a fresh perspective on ideas, values and beliefs.



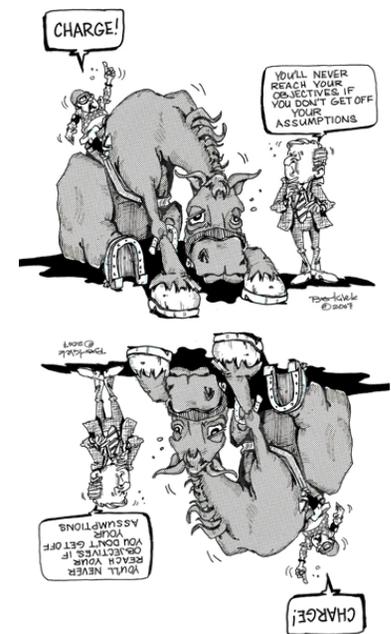
ACTIVITY: ASSUMPTION DUMPTION [USES]

- To make unstated beliefs explicit.
- To develop shared understanding across diverse groups.
- To explore the problems “behind” the problem.
- To identify opportunities for further investigation.



ACTIVITY: HOW TO ASSUMPTION DUMPTION

- Working individually, create a list 3-5 comments (short sentences or words) of assumptions you hold about the UBC South Campus.
- Note them on post-its and put whiteboard or wall.
- As a team, group comments into themes.
- Then.... **reverse assumptions** listed on post-its
- List reverse assumptions with alternate coloured post-it
- Post new post-its next to first ones on whiteboard.



MOURA QUAYLE

DESIGNED LEADERSHIP

 Columbia Business School
Publishing

\$35.00 / £30.00 · cloth 978-0-231-17312-4
JULY 2017 272 pages · 158 illustrations

 Columbia Business School
Publishing



COLUMBIA
UNIVERSITY
PRESS

ORDER ONLINE NOW AND SAVE 30%
CUP.COLUMBIA.EDU

Enter Code: CUP30 for 30% discount

Regular shipping and handling charges apply.

Customers in the United Kingdom, Europe, Africa, the Middle East, South Asia, and South Africa, please contact our UK distributor WILEY via email: customer@wiley.com.

Thank you!