

Reference Model

Annex 3:
List of missions - guidelines for
students

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Mission 1 - Design Brief

Mindset

This is the beginning, take time to get to know each other, have fun and add a personal touch to the your team.

General Instructions

The first day is devoted to creating the conditions for a good start. Read this individually and come back together to discuss it point by point.

Space and time

These two factors are the most important: your space and your time. Pay attention to how you design them: Light, sounds, food, sleep, and daily rhythm greatly influence our behavior and success; therefore, try to design them in a way that allows you to perform at your best. Be sure to establish a routine and communicate your work schedule to your team. You must have at least half a day of synchronized work all together each week.

Keep a journal of the time you spend working together (in chat or video) and the time do individual work focusing on a single task. Don't mix up your time too much and don't try to multitask. It doesn't work. If you are a fan of the Pomodoro Technique, you can use that too.

Notifications

Set and manage your notifications wisely. You can set different notifications for different channels on Teams and WhatsApp.

Fewer distractions lead to faster work. You should not be pulled into different states by your notifications. You must purposefully decide to enter a more focused state (deep work) or jump into a lighter conversation.

Good writing

In an office, much information is shared in person. In a remote situation, almost everything is shared through written communication. Good writing is one of the most important parts of remote work and critical to a team's success. Be sure to write your intentions clearly and in short sentences.

A good day is seen in the morning

Make a quick 15 min. video call as a standup each day and discuss what you will do individually and together on that day, whether there is anything you might need from others, and whether there is a need to change your plan.

Tuesday, summary

Every Tuesday at 7 p.m., one person on the team posts an update on LinkedIn about what the team did that week and what the plans are for the coming week. Use an appropriate Topic from your team (e.g., #Team1Status).

Tools:

[link]

Team is the center of communication, you have all been added to the class space and to your Team channel. Read the welcome message on the #General channel and introduce yourself in the channel #_Introduce yourself. The channel you have for the team functions as a Chat

Calendar of things to do

Create an activity calendar to keep track of what is happening. It is up to you to decide which tool to use. Microsoft Planner and To Do can serve as good weekly planners, but so can Trello, Asana or a board on MIRO. After each meeting take time to decide what needs to be done for the next week, when you will do it, and who responsible. This works great for remote teams, because if someone is looking for something to do, they can just go grab a card from the todo board and make themselves useful.

Send an email

to communicate with the company, set meetings, share documents, ask questions of the business team, etc. It should be the formal communication tool and should be used sparingly.

Whatsapp

Use the whatsapp group for URGENT communications that need quick responses or about things that nothing to do with the project. Don't mix plans (project and) and put all project communication on Teams.

Miro

Your office wall is your shared notebook. Think of it as a shared table where you gather whenever you work together with the team. Use the boards to collect and summarize material.

Google Meet or Teams or Discord

Video meeting and interviews with team, mentors and company.

GUIDELINES

1. Guidelines for identifying the enterprise
2. Design Brief Directions.
3. Template Design Brief

1. Guidelines for identifying the enterprise

In the Organizational Change and Business Process Design in Engineering course, the team will have to conduct a business process design project aimed at the development of a micro-enterprise with the goal of financing the project through a call for proposals sponsored by an institution or foundation, in collaboration with the Grameen Italy Foundation. Specifically, the first activity will be to identify an organization interested in addressing a specific challenge, where to apply the concepts and techniques learned during the course in order to design a change process. During the project, it is crucial to identify a source of funding, so as to define the budget that the organization can invest in innovation. The funding can be internal, a call for proposals (from private entities or foundation) or microcredit. Microcredit is aimed at both aspiring entrepreneurs, or entrepreneurs already in business, and individuals. The two types also differ in the maximum amounts that can be disbursed and the duration of repayment plans. The goal of entrepreneurial microcredit is to foster the right to economic initiative to enable individuals to generate income and be economically independent. In particular, the categories targeted by the tool are mainly the self-employed, women, young people and start-ups. With the Ristori Decree, the maximum amount that can be disbursed was raised from 25 thousand to 40 thousand euros, a limit that in special cases can be increased by an additional 10 thousand euros, while the repayment plan does not exceed seven years, extendable under certain conditions up to 10. No collateral is required to obtain the financing. Those interested in entrepreneurial microcredit can be: individuals, associations, cooperatives, partnerships, and simplified limited liability companies that need to collect liquidity to start a business or develop an existing one. The following are eligible for entrepreneurial microcredit: self-employed persons with a VAT number for no more than five years and no more than five employees, sole proprietorships with no more than five employees and an active VAT number for no more five years, and **companies (partnerships , professionals, cooperatives or simplified limited liability) with a VAT number for no more than five years and a maximum of 10 employees**. Alternatively, it is also possible to deal with nonprofit organizations, associations and entities that meet the same requirements for employees (excluding volunteers).

Each team member will be able to propose a small or microenterprise interested in tackling a specific challenge, where they can apply the concepts and techniques learned during the course in order to design a change process. Ideally, the project should be "*Internal Venturing*," something in discontinuity with what the organization does on a daily basis and that it is aimed at development. This project, in this sense, is an opportunity for organizations to consider changes on topics that interesting or in response to contextual challenges, but so far have not been explored in depth.

The project can fall under different organizational domains (e.g., strategy, innovation, sustainability,...); business functions (e.g. HR, communication ...); or specific lines of business.

The design challenge must be placed within a research context that is easily accessible to students, so as to allow for on-field qualitative research activities (interviews, observations, prototype testing, ...).

Through a process of internal team discussion, choose the project that has the most accessible study context, has the greatest readiness from the organization, and best meets the team's characteristics.

NB The result of the project is a project to change the organization. Do not make commitments on activities that involve the implementation of solutions (digital or otherwise) as, for example, there should be no software programming, website creation or construction of new production machines.

2. Design Brief Directions.

The Design Brief is the document that consolidates the starting point of the project. It is kind of "contract" with organization and contains the essential information starting the project. In the Design Brief, it is also very important to state what is meant by the "success" of the design of change and how to be able to represent it in terms of performance. Some guiding questions for the meeting with the organization:

Challenge

What is the challenge for the team?

The best format for expressing a challenge is by setting one or more questions "How can we...?" Ex: How can we create a more user experience?

How can we improve collaboration between?

How can we tell the territory about ourselves in a more..... ?

Exploration Tips

Hints and inspirations to guide the team's research

Who is it possible to interview? What context can be observed? Where can information be found useful? What can be "studied"?

Corporate team

Who is the company's core team composed of (one or more people) Who is the "champion" of change?

What is the motivation for change?

Create the team's digital space. Log in when you are with your team and follow the instructions in Fig. 1 to activate your space. NB share it with me using the email [\[email\]](mailto:email)

<https://miro.com/...>



Fig. 1 - Set up you Digital Space

Compiled team information and defined rules of operation

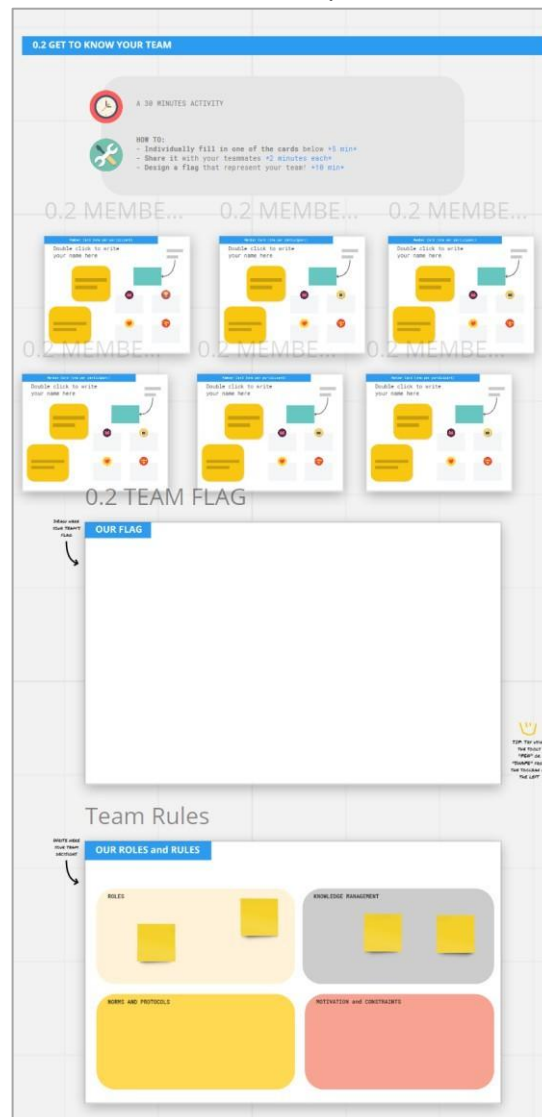
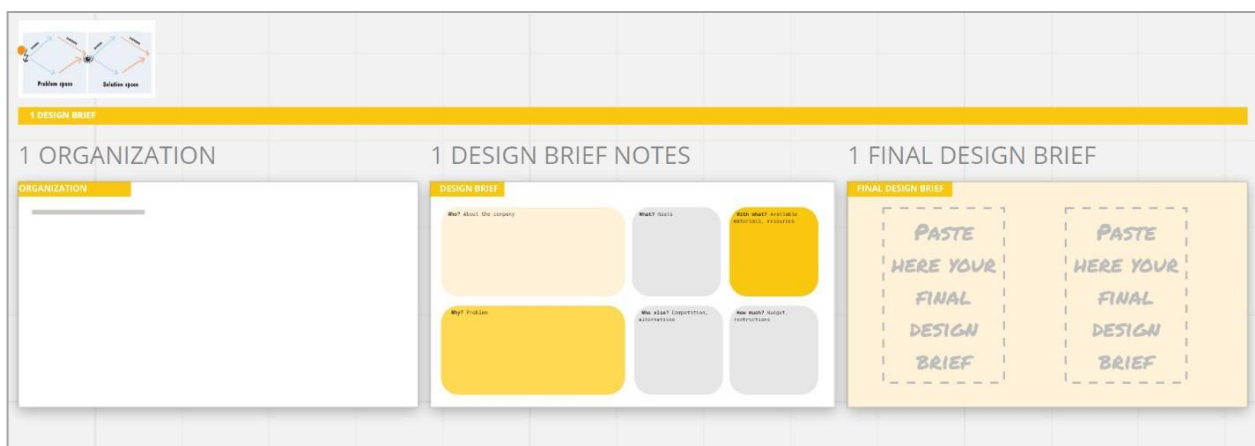


Fig. 2 - Team board

Good Practices for the first meeting

- Write an email confirming the appointment with proposed time flexibility to the contact indicated in the document
- Ask at the opening of the meeting for permission to record
- Prepare a brief team presentation (1 slide per person) to open the meeting Pass the floor to the organization for the challenge presentation
- Prepare follow-up questions with the goal of gathering information useful for starting the first activity (Design Brief). NB The organization may not necessarily know how to answer them; perhaps they will refer you to other sources.
- Agree at the exit of the meeting on next steps and any additional interviews to complete the brief. Write a minute of the meeting and share it with the organization.



- Once the brief is completed, paste the two pages onto MIRO to have them available.

Fig. 3 - Design Brief.

3. Design Brief template (MAX 2 Pages)

Organization:

Web Site and Contacts:

Project name:

Team:

This section presents the competitive environment in which the organization operates, a general description of the organization and the main strengths/opportunities in relation the strategies and actions of stakeholders and competitors.

Challenge (Innovation Intent)

This sentence concisely represents the opportunity/problem to be addressed by the project.

Aspirations - What would be nice to have?

This section summarizes the current situation of the organization, expressed in their own language. One should summarize the opportunity/problem of the organization and the impact would follow its resolution (product/process innovation, cost reduction, efficiency, increased knowledge...). The goal is to demonstrate an understanding of the current situation and the desired future state of the organization-this is the motivation for the entire project. NB Do not express the future state in terms of solutions in this section because they could become an anchor for the organization (not: "through a website we will be able to better communicate our enterprise" but "through this project we would like to reach customers in other Italian regions starting from the north and inform our current customers of the new services we propose").

Intentions - What should be the goals?

In this section, you should specify the objectives of the project, as presented by the organization, after being elaborated and extended by the working team. Be specific and use a SMART approach (Specific, Measurable, Achievable, Realistic, Timely)

Constraints - what are the constraints?

Constraints represent awareness of the organization's context, limiting the project team's work and excluding certain solutions a priori. Constraints will be studied in the project to verify their existence.

Assumptions-what is taken for granted?

Assumptions are factors considered to be true, real or certain, which will require validation in the project. In this section, you must try to create explicit information from the problems presented and indicate certainties that are not based on observable data.

Performance-what can we measure?

In this section, objectives are broken down into measurable components that can be evaluated at the end of the project. Goals and performance articulate the expectations of the team and the organization with respect to the solution.

Mission 2.1 - Benchmarking

Mindset

"All I know is that I know nothing." - Socrates

"Most probably, somewhere, someone has already solved this problem or something similar."

General Instructions

This mission is dedicated to getting in touch with the organization and the competitive environment. The first week also focuses on document research and observation.

Organize a virtual tour of the organization: visit the website, learn about the organization and its services, marketing and advertising. Visit social media, understand what customers think about it. Take screenshots and note anything that might be related to the challenge. It is important that your future ideas are based on the organization's existing resources and ongoing projects.

To help you make sense of all the information you find about the organization, you can begin by using Galbraith's Star Model and identifying the status quo in relation to its categories. As in the river metaphor that was presented in class, in the Star Model the characteristics of an organization fall into five categories.

- The first is strategy, which determines the direction, the goal the company wants to achieve.
- The second is structure, which determines the position of decision-making power: who is responsible for what?
- The third is processes and information systems, which has to do with the flow of information: sales processes, decision-making processes, innovation processes-what does your organization do and how? What technologies does it use? How does it manage information?
- The fourth is incentives and control systems, which influence people's motivation to perform and achieve organizational goals.
- The fifth category of the model is people-related characteristics (e.g., human resource policies), which influence and often define the mindset and skills of employees.

At this stage, you want to focus on the first 2 categories. The third, fourth, and fifth will be useful in later stages.

Observe

All designers should be good observers.

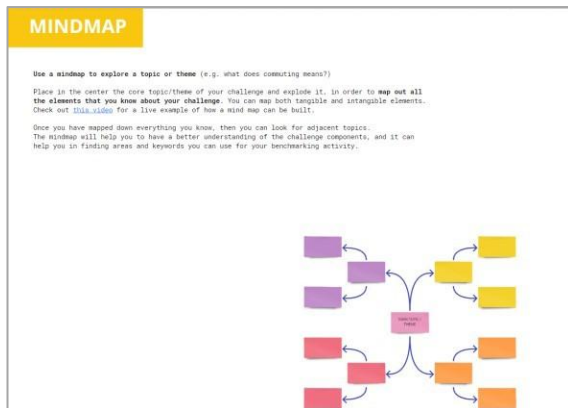
Tip: Paying attention to what people do and how use objects and environments is critical during a Design Thinking research study.

Work on your point of view!

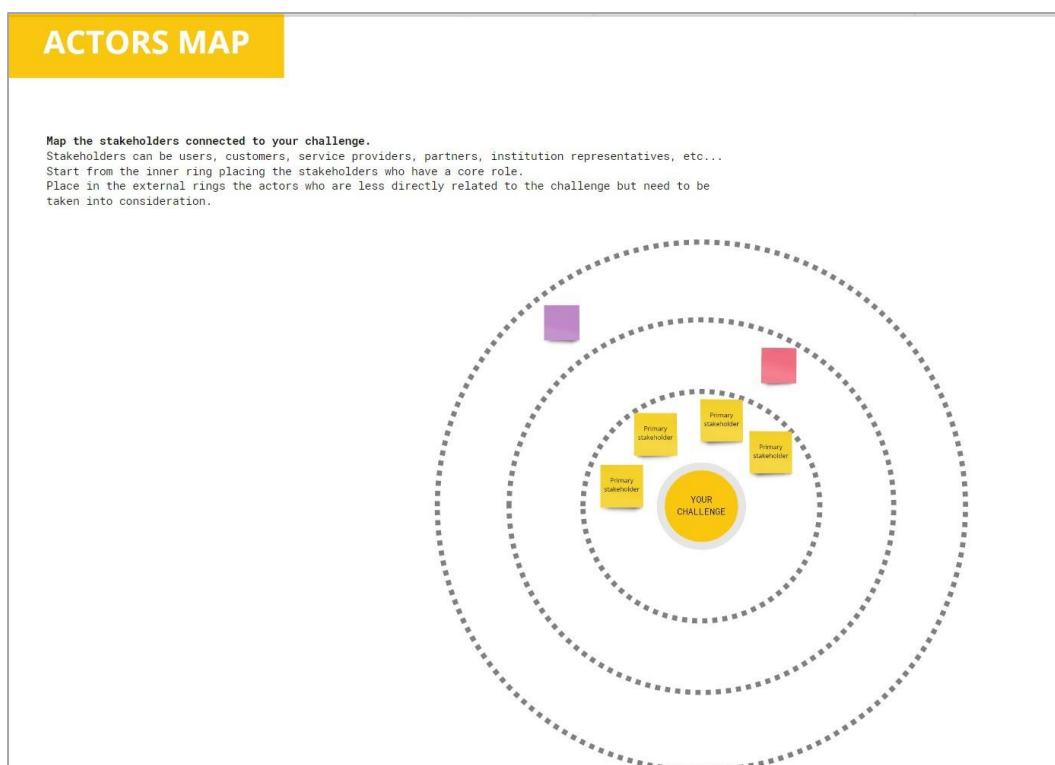
Take a look at the different tools and methods of the inspiration phase and figure out how to leverage your network to gather information. What resources might allow you to best explore your topic? For example. you could ask all your friends and family members to send you a picture on whatsapp while they are using the services offered by your organization,

or you could ask for help on how they found themselves using that type of product or service from your network on social media.

Tools:



Using the Mindmap tool, put on the sheet everything that comes to mind with respect to venture and the challenge. Knowledge, interesting people, doubts, questions, potential associations, other similar ventures, your memories, etc. etc.



Make a stakeholder map, map all the stakeholders who are connected to the organization directly and indirectly and update it as you go along.

BENCHMARK

Collect here interesting case studies and existing solutions to your challenge.
Can you find any emerging pattern? Feel free to re-arrange them in a matrix

						...
Name (link)	Name (link)	Name (link)	Name (link)	Name (link)	Name (link)	
what is it (in a tweet)	what is it (in a tweet)	what is it (in a tweet)	what is it (in a tweet)	what is it (in a tweet)	what is it (in a tweet)	
why it is interesting?	why it is interesting?	why it is interesting?	why it is interesting?	why it is interesting?	why it is interesting?	

Document research and benchmarking: How have others solved this challenge or similar problems? What are the relevant trends, technologies, and products?

Hint: Open up and explore, but stay relevant to the challenge. The goal is to create an archive of many potential solutions/angles to the challenge. You have a limited amount of time, so think carefully about which particular benchmarking is most necessary for your team at this early stage of the project. Of course, you will have many more opportunities for benchmarking as the project progresses. Use this Toolkit and Template to organize your best results.

COMPETITORS MAP

Identify other's strengths and weaknesses, assess recognized good practices.

Current state

Direct Competitors

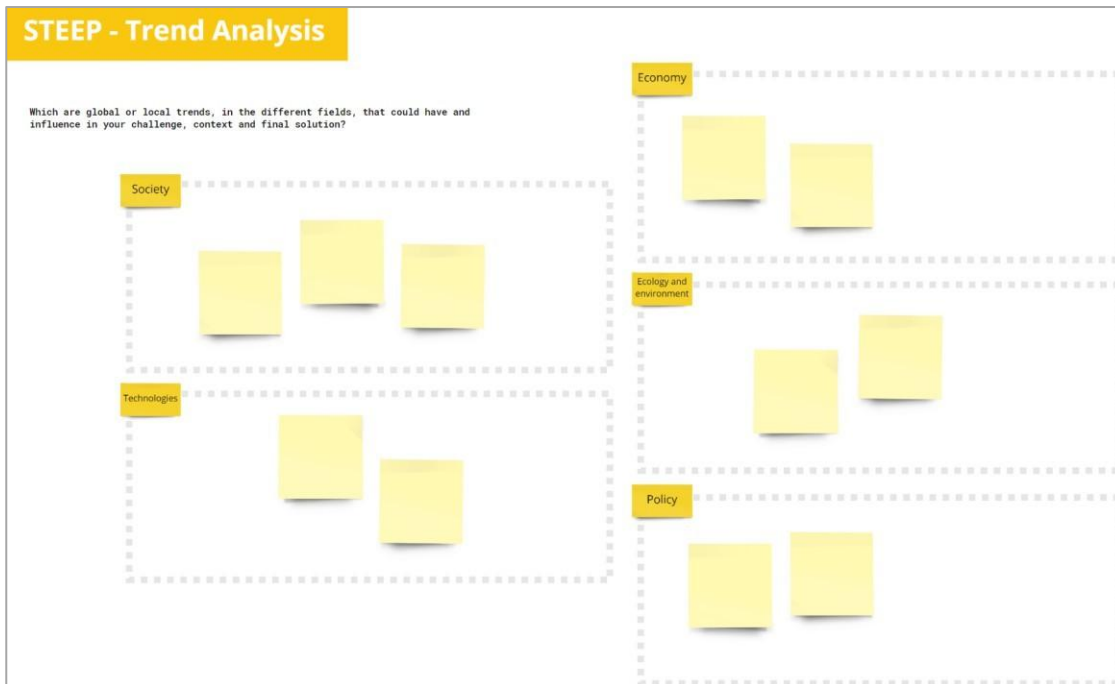
Offer the same solution

Indirect competitors

Offer a different solution that solves the same need/problem

Study the organization's competitors carefully, starting with direct competitors. What solution do they offer? How do they communicate value? How do they differentiate themselves? Also broaden the field to indirect competitors, who address the same need but with different solutions (e.g., an electric razor supplier is an indirect competitor to a hair salon).

Hint: Open up and explore, but stay relevant to the challenge.



Where does the river flow? What social trends are directly and/or indirectly affecting the enterprise? What kinds of technologies are currently being used and/or on the horizon? What kind of business cycle is the sector experiencing? How are environmental and sustainability issues perceived? From a legal and policy perspective, are there changes on the horizon?

BENCHMARK HIGHLIGHTS

Use this board to sum up the most interesting learnings you gained in this phase.

The form is divided into four sections, each with a title and a large text area for notes:

- The 3 most relevant benchmark case studies**: A white rounded rectangle.
- The 3 most relevant trends**: A grey rounded rectangle.
- The 3 most relevant competitors**: A yellow rounded rectangle.
- The most interesting literature review and other sources:**: A white rounded rectangle.

Share 3 interesting things you found about organization using the recommended tools and explain why they are important to your project. Collect and organize your findings and learnings.

Mission 2.2 - Needfinding

Mindset

"To create meaningful innovations, you need to know your users and care about their lives."

General Instructions

You have now delved into the context of the organization, its competitors, similar products on the market. Of course, you will continue to learn as you proceed with the project. However, at this point you have created a solid foundation. Your current understanding of the challenge is good enough to begin to have some assumptions. Now you are ready to go out and meet users and map processes!

This week is dedicated starting the needfinding phase. Needfinding is the work you need to do to understand the people in the context of your challenge. How they do things and why, their physical and emotional needs, how they think, and what is meaningful to them.

The most important thing about need finding is that we search, without knowing what we are looking for. We look for insights from the empathy we feel for users and project stakeholders in general. As you do the interviews, map the organization, compiling Galbraith's star, organizational chart, and core processes in BPMN.

Tip: Document everything and identify important things for research as much as possible along the way and not at the end. The risk is to forget important details.

- Gaining empathy for users: Discovering the emotions that drive behavior.
- Look for insights: Discover surprises or differences between what people say they do and what they actually do. And try to understand the observations that surprise you. Start by telling why people do what they do.

Tools:

Activity 1: Identify the right research questions.

Before starting any research, explicitly decide on the objectives. Determine some questions that the research should answer. Start writing down all the questions, from the short ones to all the questions that came up during the meeting.

Group the questions into groups. Some questions may occur in more than one group.

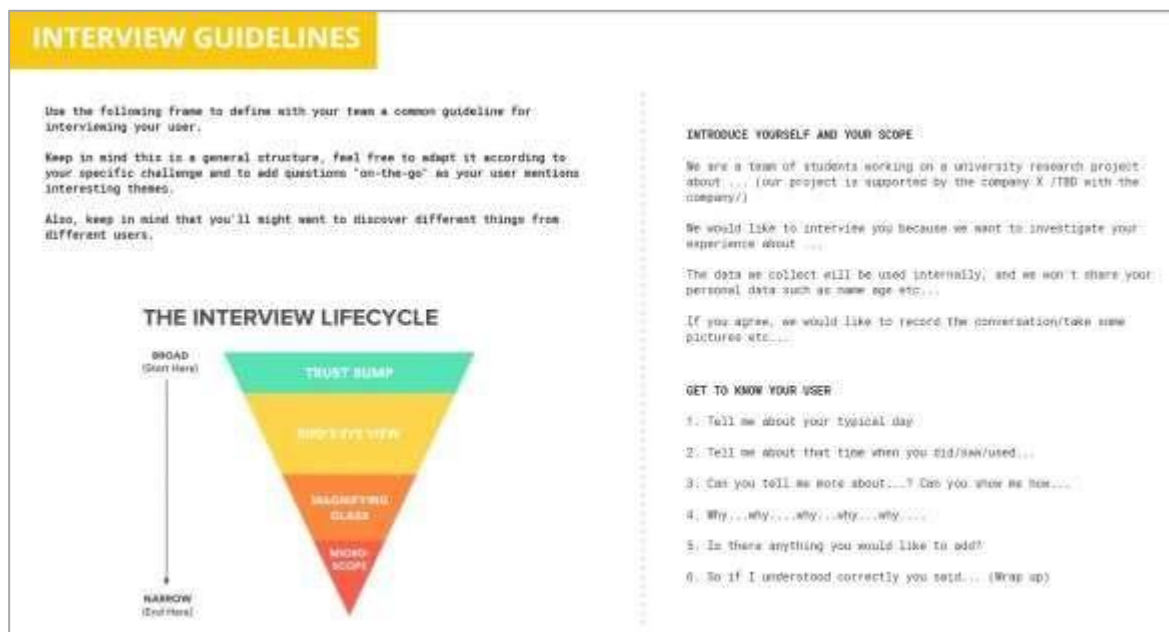
Maintain the right balance between general and deep questions that are related to meaning: such as "What do people think about that service?" and questions that are more clear and pragmatic related to form such as "What is the right place for that service" or "When do people expect to access that service?"

These questions can focus on topics such as: the use of objects in the environment, how environmental conditions affect people's behavior, how people

within the environment interact with each other, or how different types of customers might be classified. The search for answers to these questions then guides researchers in data collection.

Hint: Use how/why/what/where/when/who to write your research questions.

Tip: There is no point in spending time rediscovering information that is already known. Study publications, expert interviews, and complete benchmark to improve your level of understanding of the topic. Use what you have found to formulate interesting questions that relate the organization to the context. Go into the field only when the secondary research is completed.



Activity 2: Observations and Interviews

Identify some potential users and environments based on what has been learned so far.

Tip: Look for all types of users and make a list of people who could potentially be interesting, then identify strategies for contacting them. Also consider your informal network of friends, family and colleagues for your interviews. Some of the best insights come from small talk.

Prepare and conduct interview and observation using the toolkit. It is not necessary to do types of interviews. Decide in the team which one best fits the challenge.

Tip: Start with the easiest and quickest interviews. You will continue the interviews and mapping over the next few weeks.

Take photos or ask your interviewees for them. Good photos should be clear even without explanation and can generate interesting discussions with the organization's team.

Tip: Ask permission and reassure your interviewees that their photos and interviews are for internal research purposes only and will not be published anywhere. Also, the

Video and audio recordings of users expressing their needs are very compelling and powerful. These recordings are excellent storytelling media your final presentation.

NB the following should be specified in the invitation email or orally:

The information we collect during the interviews will be considered strictly confidential and held in strict confidence. In particular, the research will be conducted in compliance with the articles of the Privacy Code governing scientific purposes (EU Regulation 2016/679). This decree ensures that the processing of personal data is carried out in accordance with the rights and fundamental freedoms of the individual, as well as the dignity of the person concerned, with particular reference to confidentiality, personal identity and the right to protection of personal data. The information that will be reported outside the research group will be aggregate information, from which it will in no way be possible to trace the answers given by an individual person. This aggregate information is aimed at identifying design principles for products, services or systems that may constitute innovation in the context being researched.

Capture important quotes: Short "quotes" can be a great way to communicate the essence of a conversation with a user.

Hint: Write quotes on post-it notes. Is there a relationship between different quotes? If you go into the field, use the AEIOU framework to support observations

The image shows a template for an 'OBSERVATION FRAME (AEIOU)'. It is a structured form with a yellow header and a dashed border. The form is divided into five main sections: ACTIVITIES, ENVIRONMENT, INTERACTIONS, OBJECTS, and USERS. Each section has a list of prompts and a space for notes, represented by yellow sticky notes. A 'HOW?' section is located at the bottom right, with prompts for 'take notes, sketches, pictures' and 'collect things'.

OBSERVATION FRAME (AEIOU)

Once you have identified which environment/context/meet to observe, use the following form to guide your observation and keep track of what you learn. You'll might want to observe more than one environment; if so create a copy for each observation you engage in.

ACTIVITIES

- General impression
- Summary of activities
- Elements, features, notes

ENVIRONMENT

- General impression
- Style, materials, atmosphere
- Floor plan
- Scenes
- Elements, features, notes

INTERACTIONS

- General impressions (who is interacting with whom/what?)
- Scenes of interaction (How?)
- Elements, features, notes

OBJECTS

- General impressions (Which tools are involved? How?)
- Inventory of key objects
- Elements, features, notes

USERS

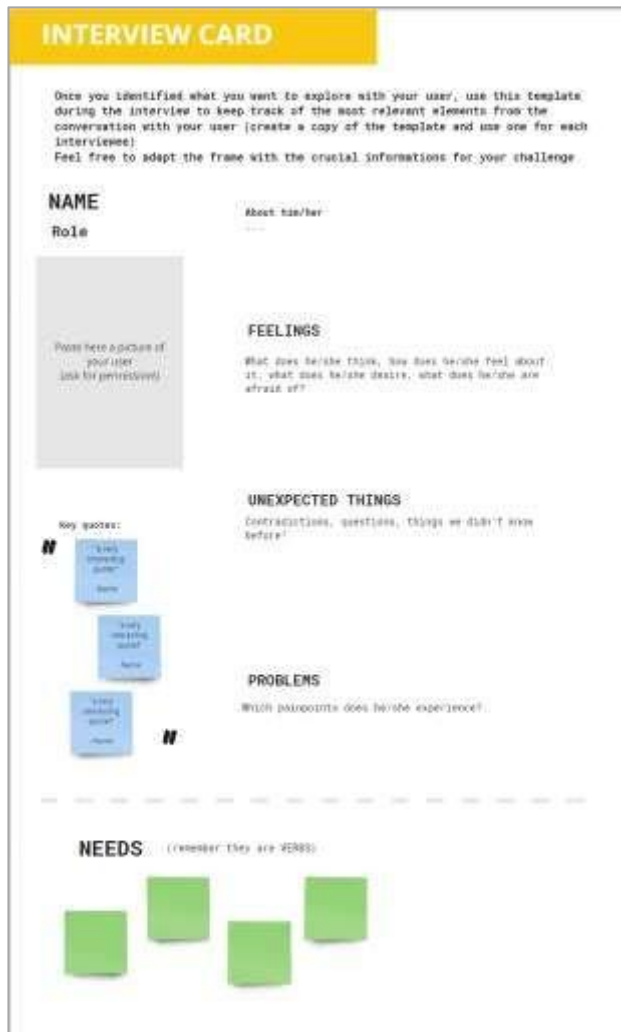
- General impressions (Who is present? Role, responsibilities)
- Scene of user in context
- Elements, features, notes

HOW?

- take notes, sketches, pictures
- collect things

Activity 3: decoding needfinding

Take time after each interview to record progress, summarize highlight interesting quotes (so- called NUGGETS), and fill out Interview Cards



INTERVIEW CARD

Once you identified what you want to explore with your user, use this template during the interview to keep track of the most relevant elements from the conversation with your user (create a copy of the template and use one for each interviewee). Feel free to adapt the frame with the crucial informations for your challenge.

NAME
About him/her


Role
About his/her

Place here a picture of your user (ask for permission)




FEELINGS
What does he/she think, how does he/she feel about it, what does he/she desire, what does he/she are afraid of?

UNEXPECTED THINGS
Contradictions, questions, things we didn't know before!

PROBLEMS
WHICH PROBLEMS does he/she experience?

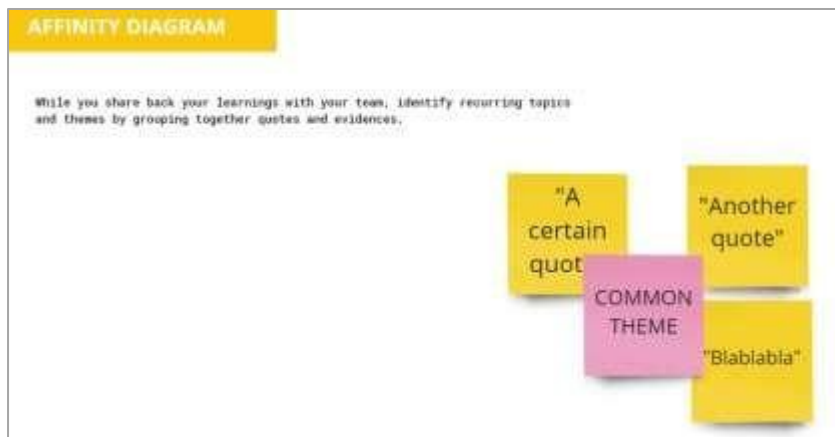
NEEDS (remember they are PERS) 

Key quotes:

N 


N

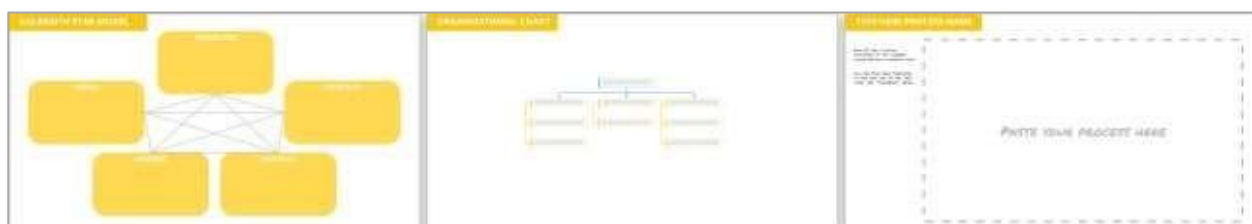
Extract needs from the interviews. Translate the information gathered into statements describing people's needs. Although some information will inevitably remain in your heads, most of it should be paraphrased as written needs statements.

Needs can be emotional, physical or practical. They may be explicit or implicit. Interpret, rephrase and group your individual needs statements. Are there connections? Do patterns emerge? Report them by grouping them together in the Affinity Diagram



Activity 4: Map the processes and structures

What are the processes that the organization relies on to function? For example, how does the sales process work? How does its internal structure work? them out and create process diagrams in BPMN that will help you identify inefficiencies and opportunities for improvement.



Activity 5: Identify the highlights

After several interviews, get together with your team to share findings and insights. Bring back specific stories and quotes, not general descriptions, that communicate your insights

THE MOST INTERESTING FINDINGS FROM THE RESEARCH

Mission 2.3 - Challenge Reframe

Mindset

"Accuracy means three things above all to me:

- A well-defined and well-calculated design of the work;
- the evocation of sharp, incisive, memorable visual images;
- language as precise as possible as a vocabulary and as a rendering of the nuances of thought and of imagination."

Italo Calvino

General Instructions

Since you started working on the project you have discovered many interesting areas. And you may have also realized that you have barely touched the surface, and that there is much more to learn and discover. But - unfortunately - time is a limited resource. There is no perfect opportunity or magic insight, there is only "time to decide!"

This week is devoted to narrowing down the scope of the project, identifying three areas of opportunity (N.B., not solutions but needs!) to focus on to go deeper in understanding.

In order to do this, you have to reorganize what you have discovered and make decisions about what is most relevant. This does not mean that you will throw away the rest of your research or that the research is finished. Keep the activities you have planned in parallel and begin the convergence process. Fill out the "Highlights for the research" board by copying the research elements that seem most promising to you; you will use them in the "Evidences" area of the EPO tool. No learning is lost in a research design; you will probably return to use what you left behind later in the process. Also, continue doing research as needed and section 2.2 to gather new evidence.

TIP: Remember to take photos and document everything, especially the reasons for your choices.

The first direction to reorganize your research is to decide who you are designing for, identify the main users who will be the target audience for your design. The second direction is about performance, identify the main data that are used to measure performance and related KPIs.

Tools:

Activity 1: Identify themes and recognize relationships

Now is the time to go through all your research from week one to the present to get your space and mind in order. Find the threads of your research by looking at two perspectives: (1) people and their needs, (2) data and performance that generate value. Use these perspectives to draw connections through your research to identify recurring patterns.

Take a step back and look at all your findings from a higher perspective. Try to notice where patterns might emerge. What quotes, ideas, or other thoughts have been repeated over and over again? These are likely to be the starting point for interesting themes. Prioritize the information and organize it into clusters.

- What has been mentioned by many people?
- What is most important to organization?
- What are the recurring themes?
- How are they connected?
- What is the common thread?

Do not be afraid to group and reorganize your categories; this is a nonlinear process, and relationships will change as you continue to process and organize information. You are interpretation and dancing ambiguity, so it is important to look at the information in your research in a nonliteral way and try to discover new meanings through intuition.

Insights (or insights) are concise expression of you have learned that is interesting and new from your research activities. They combine observation with inference (abductive thinking) to create new meaning. Insights highlight an understanding of the problem and are unexpected, non-obvious, and above all, interesting.

Warning: Convergence, sense-making and synthesis are difficult mental jobs. Try to be completely present, focused and concise in your discussions. Set a time limit for this activity, otherwise you will get lost. Have (dark) chocolate and fresh air or dance a little when you feel stuck.

Activity 2: Trust your instincts

You may feel like you need another month to move forward your research. But the problem with not focusing is that if you keep working on different topics, your knowledge will continue to diverge and increase. You will end up with a lot of data, but no concrete action. When you have identified an opportunity, you need to delve into it, not wait for an imaginary "perfect opportunity" yet to be discovered. Even if the opportunity does not turn out to be useful later, you can learn a lot more from a bad decision than from making no decision at all. Remember the hunter in the middle of the woods.

TIP: A useful tool for focusing is to use the POV (Point Of View) framework.

Focus by Writing a "Point of View"	Focus by Writing a "Point of View"
WE MET . . . (user you are inspired by)	WE MET . . . a young millennial living in SoCal
WE WERE AMAZED TO REALIZE. . . (insight—verb reflecting user needs)	WE WERE AMAZED TO REALIZE. . . he protects & preserves clothing by not washing them often
IT WOULD BE GAME-CHANGING TO. . . (Synthesized statement to leverage in designing solution. NOT just a reason for the need!)	IT WOULD BE GAME-CHANGING TO. . . help him care for his clothes while keeping them clean

WE MET . . .

(user – possibly extreme – you are inspired by)

WE WERE AMAZED TO REALIZE . . .

(what did you learn that's new?)

IT WOULD BE GAME-CHANGING TO . . .

(frame up an inspired challenge for your team.)

(don't dictate the solution.)

POV: **We met** Janice, a harried mother of 3, rushing through the airport only to wait hours at the gate. **We were surprised** at the many games she makes up to to entertain her children so they don't irritate frustrated fellow passengers. **It would be game changing** to bring the other passengers and the airport facilities into helping families have a better travel experience.



Activity 3: Build the Personas

Once you have identified the two types of users on whom you want to focus your opportunities, you can reorganize the research you have conducted in the Personas tool. This tool is useful in defining a user who will accompany you in your design; it must be a vivid representation that comes from the research, not a summation of psychographic data. Explain their histories, behaviors, habits, needs and frustrations related to the research question. Change and improve the proposed framework as you see fit. By reading it a personas, it must be possible to empathize directly with the users through your research.

PERSONAS

Now that you have a much more clear picture of your users it is time to synthesize your learnings in personas.
Remember: a personas represent a group of people with similar habits and behaviours, even if from their ID cards they look like they have nothing to share.

Start from the 2 most relevant stakeholders you have identified, and later make sure you have a persona for each most relevant need you identified.
As for the interview cards, feel free to add details to the structure that are relevant for you.

NAME AND KEY CHARACTERISTIC
(es. John the traditionalist)

<div>Prepresent here your persona (use a picture or a drawing)</div>	About him/her and his/her context ...	He/she likes ...	He/she dislikes ...	His/her aim or desire ...
	How does he/she relate with the challenge? Which are his/her habits regarding it? ...	What is important to him/her? ...	Which are his/her fears, painpoints and frustrations? ...	NEED REMEMBER THAT NEEDS ARE VISIBLE
<div>"A representative quote"</div>				

Activity 4: Work on data and KPIs.

The language of the enterprise is that of budgeting and performance. Gather the financial and economic information you might need to calculate performance. Identify trends, track value, track costs. Look at the processes you have mapped, what data do you need to measure their outputs? The inputs? How do you measure the contributions of process actors to make sure it is aligned with expectations? Organize the data you collect in a way that speaks to you.

Identify key performance indicators: What does the organization want to have under control? Why? What information is useful for decision-making in the processes you have identified? What information would add value in decision making?

Select four key indicators that are useful in measuring the improvements you will bring with your project. What should the organization know to notice that something has changed? Try to identify drivers so that you notice changes before measuring results.

REMEMBER: A KPI represents a strategic objective and a metric that measures performance With respect to that goal.

KPI NAME	
ITEM	DESCRIPTION
Indicator	
Metrics	
Unit of Measure	
Type of Value	

Activity 5: Redefine the challenge

You now have a better understanding of the users and the design context, and you have discovered a number of interesting needs and opportunities to address. Look back at your design challenge.

What are the top 3-5 insights that best address your challenge? Have you found the cause? Express your point of view. Ask yourself:

- Where does it make the most sense and the most impact to intentionally focus our efforts?
- What is the best story you can tell that is inspiring and supported by your research?

Be brave!

Identify which topics seem to arouse the most energy your team and organization. Which topics generate the most enthusiasm and questions? Topics that have the most momentum often have the most potential.

Activity 6: From problem to opportunity, showing evidence

It is important to support your challenge reframe with relevant evidence that will show rationale and reasons behind your choice. In this case, *Show don't tell* is your mantra: collect and use quotes (users' words), photos, videos, and artifacts that can help you build a more concrete opportunity for your reframe.

Use the problem-opportunity-evidence matrix to show the potential of your new research focus. Repeat for three

OPPORTUNITY IDENTIFICATION	
<div>EVIDENCES This section should contains all the evidences which can prove that:<ul style="list-style-type: none">• the field is relevant• your problem and opportunity are solid and real. Quotes Fact: Need: Trend: Performance:</div>	<div>PROBLEM Which is the problem / need to address? Who is interested in solving it? Why? OPPORTUNITIES What can be achieved if this problem/ need is satisfied? Who will benefit from it?</div>

Mission 2.4 - Milestone Presentation

Mindset

"Storytelling is the most powerful way to put ideas into the world" Robert McKee

General Instructions

The purpose of this presentation is to tell the organization what you have discovered and to offer them a choice among some alternative opportunities. The opportunity for a "formal" presentation is important for the team to reflect on the central points of your analysis and to take a point of view. You will not be held to this viewpoint in the future, and if necessary you can change your focus during the next month.

Your presentation should be understandable to anyone who might be seeing your project for the first time. Consider that a presentation is a story, and in telling it you decide what is important and what is not. In the time you have available (max 20' and max 20 slides) you will not be able to present everything, so consider what is the message you want for your audience, what they already know and what will surprise them, how they should feel while listening to you, and what might help them decide.

Opportunities must emerge from your research, the audience must understand why you are giving them

proposing a direction and what value there may be from walking it.

Allow time for discussion (about 40') so that they understand the effect of the presentation, their inclinations and uncertainties. The presentation is a way to disrupt the status quo: becoming aware of needs and problems is the first step of any change.

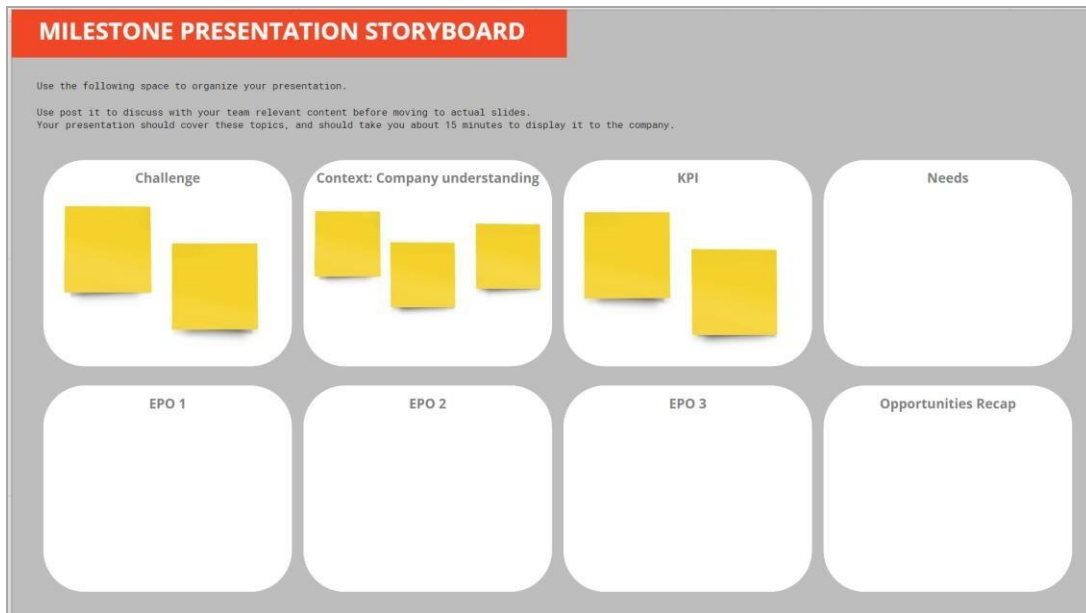
Delivery

1. **Video** - Empathy (Observations, Interviews, Context...) - max 3 min [NB. Upload the video and create a document with the link for delivery]
2. **Infographic Poster** - Secondary research, data, trends...
3. **Milestone Presentation** - Analysis
4. **Report** max 10 pages+ appendix (interview card, BPMN, ...)

Tools

Activity 1: Milestone Presentation Storyboard.

Begin by brainstorming with respect to the presentation storyboard. What do you want to say? What are the key concepts? Always ask yourself what feedback you are looking for from the audience. What are the points you really want them to remember after you finish? Define them and then build your story around these few points.
START AT THE END.



This is a non-exhaustive and unordered list of what your presentation should cover:

- Present the redefined challenge (what problems/opportunities do you think are important to solve)?
- Introduce the context of the project: give evidence that you have understood them. Explain what directions you have considered and what directions you are pursuing. Create a perspective of the organization with respect to the competitive environment, present key processes. [for example you could use the video here].
- Tell the data and critical performance, put up targets, and provide a vision quantitative of the organization [e.g.with infographics].
- Explain what is relevant about benchmarking and needs research. Introduce the Personas and key needs. Explain what you have learned. Include quotes and photos from your research.
- Introduce the EPOs in order, explaining the evidence, problems and opportunity well.
- Present a final slide with the opportunities side side to support the decision

Note: This should NOT be a chronological account of "We did this...and then we did this."

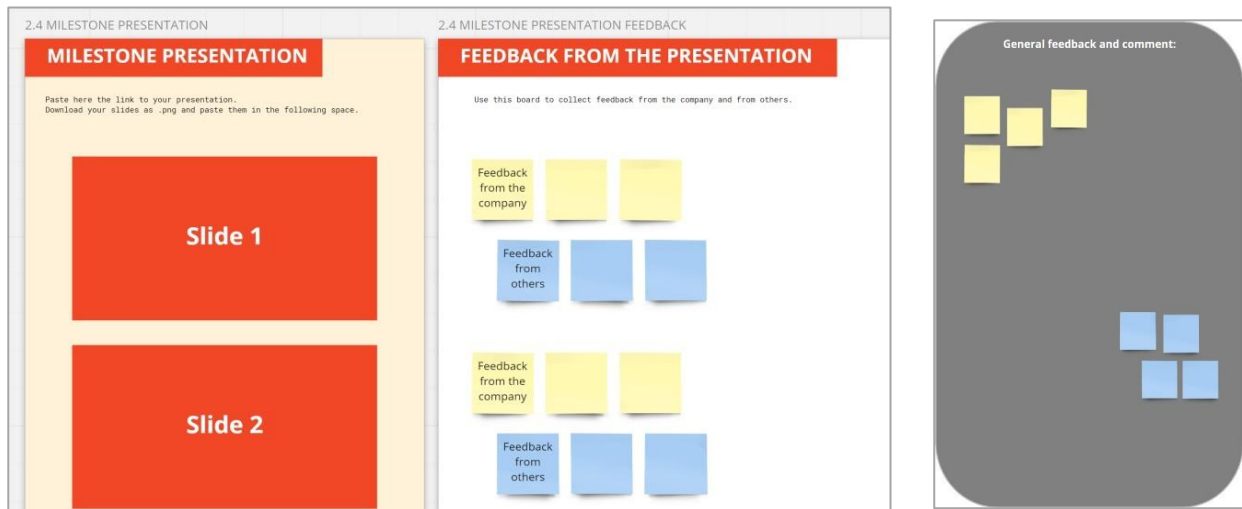
Focus on the most interesting results and insights. Make a story! Some general suggestions:

1. No images taken randomly from the Internet. These images look fake. Show real research, real users, real prototypes, real user tests.
2. Avoid overly complex slides. If you are showing a system diagram, present it through several slides focusing on the salient points or pointing out the focal points in the diagram.
3. Be visual, use key words. Slides are not for you to read. They are meant for your audience.

Activity 2: Put slides on Miro and record feedback

During the presentation and in conversation, collect feedback with respect to the slides to have them sorted on the content. Repeat the presentation at least 10 times so that you are sure about the content and exposition. Rehearse it with people outside the project to make sure it is understandable.

Record the presentation so that you can review it later and rediscuss it in the team.



Activity 3: Make the appointment

As early as this week, arrange with the organization for the presentation with at least one hour preferably on November 8 or the days immediately following.

It may happen that the organization wants to pursue multiple opportunities. In this case, ask them to create a prioritized list and identify which variables are being considered.

For the course you will focus only on the most important EPO, to maximize learning while keeping engagement under control.

Organize an internal group debrief to discuss the feedback received and the chosen EPO immediately following the presentation. Write me how it went in the weekly digest!!!

Good luck!!!

Evaluation

Content: is the context correctly represented? Does it cover all relevant needs? Are organizational processes clearly analyzed and mapped? Are stakeholders correctly presented and have all their needs been identified? Is performance designed correctly? Is the solution presented complete and implementable? Does it use simulation elements to support the design?

Methodological rigor: are relevant tools used correctly? Is relevant literature cited and used?

Creativity and independent contribution: the team able to go beyond what was asked? Is what was presented surprising or remarkable in any aspect?

Organization of work: is it clear who did what and how the project was organized? Was the time team and people spent on the project reported?

Presentation: is the presentation clear and well crafted? Are all materials curated? Does the presentation present a plausible story for the evolution of the organization?

Mission 3.1 - Design Principles and Ideation (Business Hypothesis)

Mindset

"To me, photography is an art of observation. It is about finding something interesting in an ordinary place.....I've found it has little to do with the things you see and everything to do with the way you see them."

Elliott Erwitt

General Instructions

Wow! Congratulations!!! The first project presentation is gone! Now take time to reflect on the interaction, what struck them, what they lit up about, what directions caught their attention and why. Start with the chosen EPO to reflect on why it was chosen and what expectations were generated.

You have just entered the Design phase: here you will have to generate ideas and develop them into concepts, prototypes, tests, build, fail, add more ideas, and try everything you think will be relevant to realize your design challenge.

While exploring the solutions space you will go through an intense and divergent phase of idea generation. Your mission is to dive deeply into the needs you have defined during the research phase and learn as much as possible about the specific personas you have identified.

The first thing to do in order to proceed with the project is to synthesize all the knowledge by turning it into design guidelines for the development phase. It is at this stage that design principles come into play. Design principles are strategies for solving a challenge independently of a specific solution. As a design team, you must articulate principles translating your findings-such as needs and insights-into design guidelines. These principles will form the abstract perimeter for evaluating solutions in light of research and succinctly communicating what is acceptable and what is not. Design principles help you identify the most important constraints and promising opportunities that you have discovered during your research and put them into a form that you can use to ideate on them. Design principles are written statements, usually in the form of imperatives, are laws applicable to the field of solutions, guidelines, and advice that help you condense the most important things you learned in the research phase and serve as a guide during the decision-making process.

Design principles are generally expressed as evocative and intuitive phrases that will inspire and stimulate future development. To keep them intuitive you should present design principles figuratively, with pictures and real quotes from people with whom you have tested your ideas.

Remember that good design principles are project-specific, not generic truths, and should help the team say "no" to perhaps interesting but proposals or generate new ideas when you are stuck.

Tools

Activity 1: Write down the Design Principles.

1. Start with the challenge and review the research. Gather the learnings that seem significant to the project goals, organizational culture, and particularly important to the clients or user groups.
2. Write the metaphor of the project
3. Review the personas and ask yourself. "what have we learned so far about people's emotions, reactions, attitudes, fears, and expectations that is critical to bring back to the solution?"
4. Identify some themes in your research (Themes are general topics such as "trust," "choice," "reactions," "identity," "imagination," "context," "quality," "perceived value.")
5. Turn themes into insights. Insights are concise expression of what you have learned from your research activities. Remember that an insight combines observation and inference, so you will have to interpret the theme to form the insights.
6. Write a sentence that is clear and memorable: (Remember that obvious, low-level statements like "the solution should be as red as the company" or "make it cheap and high quality" are not Design Principles.) Look for the most recurring themes in your research that are fresh, new, and eye-opening.

See the slides and this website for more inspiration: <https://principles.design/examples/>

Activity 2: Define the How Might We.

The Design Principles you have created serve as starting points for generating ideas. Together with the Evidence Problem Opportunity they probably already speak to need or opportunity; now the trick is to turn these insight statements into a question that allows you to generate many ideas.

As a first step, it is necessary to form at least three "How Could We" (HMW) questions. The questions at this stage serve to lay the groundwork for productive brainstorming, rather than outlining the purpose of the entire project. For example, *"how could we help the business sell more,"* is NOT a good HMW. This is critical to emphasize, as you are not looking for the final solution, but are exploring solutions to see if the need you have identified and the insights you have synthesized can be met and are actually relevant to your stakeholders.

Therefore, the questions should be specific starting with the needs that you think are main within the identified EPO. So starting from the quotas, needs, problems or opportunities create questions that begin with "How could we...?"

Each question acts as an invitation for input and exploration. Again, there are HMW questions for brainstorming that may be too narrow or too broad. The key here is to make sure the question is broad enough to allow for multiple solutions, and narrow enough to provide immediate direction for possibilities. If you find that your questions already imply a certain solution, enlarge them and ask yourself why you would want that solution. You can incorporate these reasons into the HMW question.

Example:

1. Insight from research

Marta, the college student (personas) needs help looking for ebooks in the library (need), but they are intimidated by the staff behind the IT help desk. (problem)

2. Opportunity: What is missing?

Better relationship and communication between staff and people (unmet need) for people to find help with e-books

3. Question: Ways in which we can respond to the unmet need and test our hypotheses

How we help Marta, the college student looking for electronic resources, communicate with the IT help desk in new ways and feel more welcomed?

How might we help **Carla the intern** who **wants to socialize while having coffee** in **avoiding to spend her coffee break in the line in front of the coffee machine?**

How might we help **[personas]**
that **[painpoint, problem, worry]**
to **[need, desire]** ?

Activity 3: Generate Business Hypothesis with Brainstorming.

Start with brainstorming when you are satisfied with your HMWs, because they seem exciting and have the potential to generate many ideas. When faced with a good HMW, our brains naturally begin to generate ideas. Be sure to define questions that you feel are important to solve, even if they seem difficult. If you start the brainstorming session and no ideas come to you, change the HMW!

Your brainstorming activity should take no longer than 20 minutes per question, and you should come up with at least 20 Business Hypothesis. Why? You need to get your first "mundane" ideas down on paper before you get really creative.

HOW TO GENERATE BUSINESS HYPOTHESES IN 4 STEPS:

Keep in mind the BRAINSTORMING GOLDEN RULES as you go:

1. Encourage wild ideas
2. Defer judgment
3. Go for volume
4. Build on the ideas of others
5. One conversation at a time
6. Be visual* ←
7. Stay on topic
8. Headline, give it a title
9. One idea = one post it

*USE THE "PEN"
TO SL OR MAKE A
QUICK SKETCH BY
HAND, AND TAKE A
PICTURE OF IT

1. put the HMW on the brainstorming board.



2. Set a timer and allow 5 minutes for individual ideation. Each team member takes a color and writes down all the ideas (title, or tweet, or drawing).

BH title: BH in a tweet: BH visualization:	BH title: BH in a tweet: BH visualization:	BH title: BH in a tweet: BH visualization:	BH title: BH in a tweet: BH visualization:	BH title: BH in a tweet: BH visualization:	BH title: BH in a tweet: BH visualization:

3. Once the 5 minutes are over, allow 2 extra minutes if the ideas keep flowing.
4. Once all participants have written business hypotheses, share them with the team. One member at a time, briefly describe the BH you wrote/illustrated. **THIS IS NOT A TIME TO JUDGE OR DISCUSS IDEAS.** Usually new ideas or strategies for improving someone else's idea come up during this sharing phase: Write your new ideas on a new post it, and share them later within the team.
5. Maximum 15 min, so do not describe BHs in depth, only give titles because you must be left with time to generate ideas together and build on each other's ideas.
6. Group similar business hypotheses. Reorganize ideas on the board by theme, or by similarity.

Activity 4: Select Business Hypothesis.

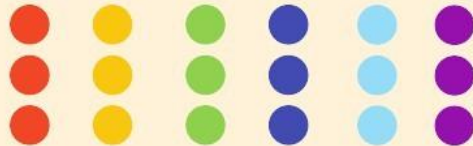
Select the two most promising Business Hypothesis for each brainstorming session. Each team member has three votes to identify the ideas they think are most interesting. Remember that at this stage you don't have to worry about the final solution, which might even retrieve elements from all the ideas you generated, you have to select the Business Hypothesis with the highest potential for learning from the needs.

Select the best 2 business hypothesis for each HMW question.

Use dot voting:

Every member has 3 dots to locate on his/her favourite BH.

REMEMBER: Your aim is to select the ideas that could help you to investigate a specific need and learn about it, NOT SOLUTIONS!



Now, explain the Business Hypothesis well **by focusing on what you want to learn from each one** and define the strategy with respect to how to develop the pretotype. For example:

BH 1 - PRETOTYPE NAME	Notes about the business hypothesis
	How do we pretotype it?

Notes about the Business Hypothesis:

If **we** offer **Interport companies with seasonal surplus goods (stakeholders)** the opportunity to rent space in Interport to store surplus goods easily and hassle-free, without having to deal with bureaucracy (idea), we expect to engage 20 companies who will pay a fee for this service (learning).

How do we pretotype it?

we could develop a flyer to show to employees of enterprises and garner their interest when they come to the coffee shop for coffee.

Mission 3.2 - Pretotyping and Testing

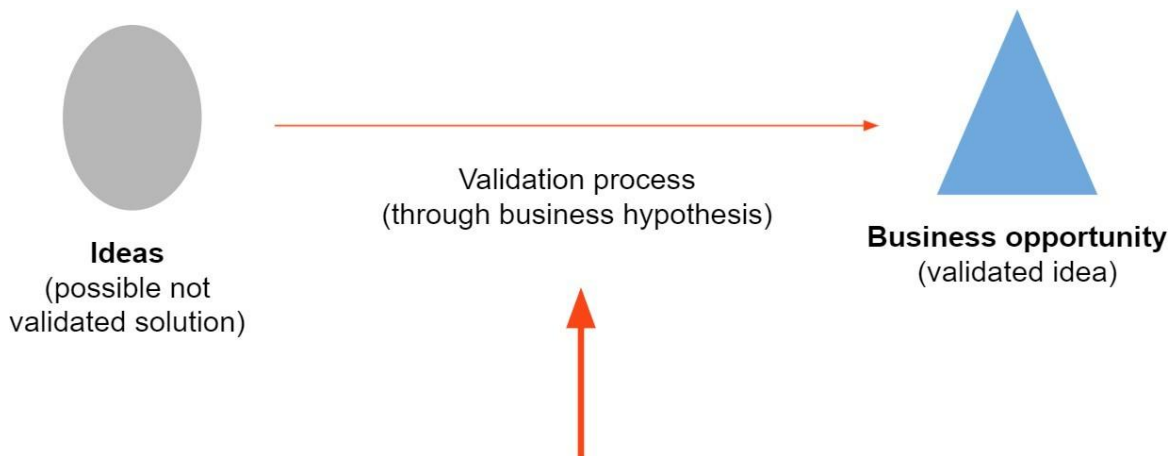
Mindset

"Nothing is a mistake. There's no win and no fail, there's only make." Sister Corita Kent and John Cage's rules for artspace.

General Instructions

The important thing is always to learn. This phase of the project you learning from a solutions perspective, turning your Business Hypothesis into Business Opportunities. The mood this week is to test some of the assumptions you have made so far about people by building quick, rough pretypes to validate specific needs (and better investigate them) by testing them on users.

Building prototypes is something you should integrate as a routine into the project from now on.



Whereas in the previous phase you learned from context and from talking with users about needs and challenges, you now need to understand whether the identified needs are really relevant through thinking about solutions. In doing so you will become increasingly familiar with the context of your challenge through a more powerful means of taking the interaction with your users to a deeper level. That's why now is the time to start building things, turning concepts and questions into tangible experiences that will help you think with your mind and with your hands, and help users better understand you and better express their needs.

The word "prototype" comes from the Greek *prototypos*, a compound of *protos* ("first") and *typos* ("mold," "pattern," "impression"). At this early stage of exploring the context through solutions, we must learn to present ideas in an undefined way. This is called low-fidelity prototyping (or pretotyping). Unlike high-fidelity prototyping, this method requires less time, specialized skills, and resources. Its purpose is not to impress the organization or users, but to learn from them. Instead of impressing people with our product or service, the goal of low-fidelity prototyping is to have users who amaze us with their comments and thoughts. In a sense, the technique facilitates listening and learning, rather than selling. On the other hand, a high-fidelity prototype would focus users on details rather than concepts, providing the design team with feedback that is not useful in defining whether Business Hypothesis is indeed an opportunity.

You will realize that your prototype is correct if it opens a conversation in which user needs, designer intentions, and other stakeholder assumptions are discussed and aligned. If they focus on the details, then most likely the prototype will not work.

Warning. It seems obvious, doesn't it? Not really. Many times designers forget this basic step and fall in love with their ideas and overdevelop a prototype by defining all the details, or make it "beautiful" because it needs to be presented. Therefore, it is a good idea to stop often, and ask yourself, "Why are we doing this?" "What is the need I am investigating with this idea?" "What is the question I am trying to answer with this prototype?"

When you test, remember that at this stage we are not interested in what people reveal about your prototype, but rather what the prototype reveals about people. A prototype is an attempt to answer questions you have about people; it is a way to test hypotheses and at the same time raise questions you had not even thought of.

Example: Prototype to test the hypothesis: "People need quick meals and to save time in meal preparation." Here the team defined a prototype conversation, writing a script and menu with time from order and time to consumption indicated, and then tested it by initiating various conversations with people in the cafeteria or cafeteria at lunchtime about whether/how saving time is an issue or a factor in their choice. They then presented the menu with various options where the order time and consumption time was specified and evident by asking which one they would choose and why.

Tools

Activity 1: Prototyping

Now is the time to start making your 6 main ideas tangible. A prototype, or a physical representation of your concept, allows you to share the idea with other people, get feedback and explore the research question. Remember that you are testing a hypothesis and that the prototype is a means, not an end.

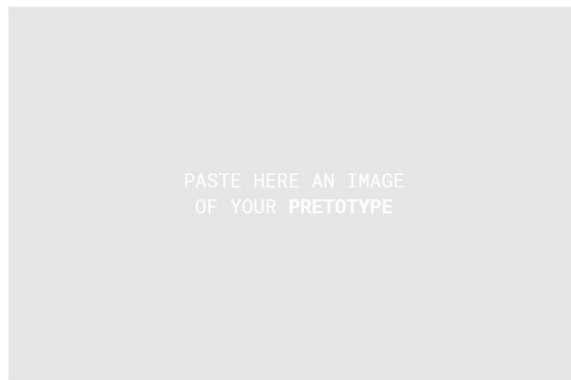
Prototyping involves preparation (what do we need to test?), construction (creating a testable and "testable" representation of your idea), testing (putting your prototype into use and gathering feedback), and reflecting on the test results to decide how to influence the direction of your designs. So it is an iterative process of intelligent planning, building, and reflecting.

General rules:

- Make sure your prototyping is well focused--or you might focus your efforts on developing non-critical parts
- Prototype early and often-or you risk running out of time. The only way to fail a prototype is not to prototype at all.
- Take time to reflect on your test results... or risk not learning from your work and chasing your tail.

Use this to make sure there is a clear WHY for each prototype: Start by writing down your hypothesis:

PRETOTYPE NAME



USER AND NEEDS

Whom is your BH for? And for what?

ASSUMPTION: WHAT DO YOU EXPECT?

e.g. people would love to personalize their working environment...

TESTED ON WHOM? HOW?

...

Repeat until you get interesting feedback

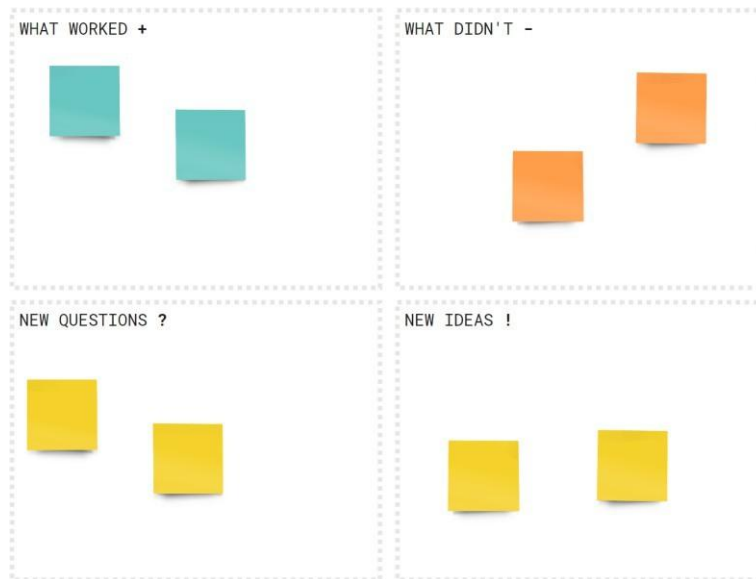
Activity 2: Testing

Now is the time use your prototypes to get user feedback, which is one of the most valuable tools in developing an idea.

In design thinking there are at least two points where it is critical to talk to people: at the beginning of a project to inspiration, and when you have prototypes, to feedback. Even at this stage, the feedback you gather must be generative so that you can continually adapt your prototype.

Feedback will still be exploratory, as opposed to validation-based: it is not about whether the idea is right or wrong-it is about how the idea can help satisfy a need. lies opportunity, in understanding what assumptions can create value.

Feedback interviews are similar to previous interviews, but you will be more focused on learning what users think about your prototype, rather than learning about users' lives in general. You want to get honest feedback, both positive and negative, to evolve your ideas.



REFLECT

Feedback is invaluable in developing an idea, but it can also be quite confusing. What you hear from different users may be contradictory, or may not align with your goals. Sort through the responses you receive and decide what to incorporate into the next iteration of testing. This activity is aimed at learning; let it guide you

SHARE IMPRESSIONS

Initiate a conversation within the team and compare the learnings of others. Take notes as you consider the following suggestions:

- What did the participants appreciate most?
- What excited them?
- What would convince them of the idea?
- What parts would participants like to improve?
- What didn't work?
- What needs further investigation?

Activity 3: Identify Business Opportunities

Share the impressions you captured immediately after conversations with users. Write the feedback received on post-it notes. Sort and group the feedback by themes: What was received positively? What concerns emerged? What suggestions did you identify? What "activates" people? What elements of the idea are recognized as valuable?

Take a moment to revisit the starting point.

What were you trying to learn? Look your previous learning and ideas. What was your original intent? Is it still valid, based on the feedback you received? Did your prototype test respond to or clarify the original intent? Was it successful in investigating unmet needs and original hypotheses?

SELECT 3 BUSINESS OPPORTUNITIES

According to your test, which business hypothesis have you validated?
Which are the 3 most promising one?

PASTE HERE ONE OF
THE THREE MOST
PROMISING AND
VALIDATED BUSINESS
OPPORTUNITIES

BO 1 -
NAME

Notes about the business
opportunity

Based on the learnings, identify the 3 most relevant Business Opportunities. Seek to select them so that they are not "variations on a theme" of the same idea. The more diverse they are, more meaningful the choice you will reach. Write down why it is an opportunity, what value is identified for stakeholders, why it should be attractive to the organization.

Remember that an opportunity:

- Responds to a need
- It is tangible for users
- Has an impact for the organization

Good work!!!

Mission 3.3 - Business Opportunities and Value Proposition.

Mindset

"I have not failed. I've just found 10,000 ways that won't work."

- Thomas A. Edison

General Instructions

Organizations are like a river. To plan the change you have to remove some obstacles, build dams and dig a small bed. When you open the bulkheads, if you have done everything right, the river will change its course and find the new path on its own. Of course, you can plan experiments to be sure that when you open the bulkheads, the river will follow its new course. Understanding this and designing its dynamics is the challenge before you. The activities of the last 3 weeks are all aimed at achieving this goal.

This week is devoted to defining the strategy, that is, where the river should go. Without a strategy, it is not possible to move forward. It is essential that the company have an active part in this process and feel that they are making decisions for their future. Should they rely on you, try to provide information, elements of context but do not replace them by pointing the way. You in a few weeks will close the planning and the project will have to change hands. This moment is critical for the transfer of ownership and a full awareness of the responsibilities associated with choosing a Business Opportunity.

If they are struggling, bring the discussion to the implementation challenges and suggest that they choose the easiest one. As in a river, just get a stream diverted, and if the path is right, the organization paves its own way.

Delivery

A presentation with:

- Recap EPO Selected II Deliverable
- Design Principles
- 3 Business Opportunities
- HMW
- Title and Description
- Value Proposition
- Benefits
- Test Results Supporting Material (if needed)

Tools

Activity 1: Compile the enterprise's Business Model Canvas.

Reflect on what you know about the organization, its customers and stakeholders, and compile the Business Model Canvas for how the organization functions today (AS-IS). The core of the canvas is the Value Proposition (VP). A VP is a business statement that summarizes why a user should buy a product or use a service. It summarizes the value we are offering the consumer or user and is something that goes beyond the actual product or service. It is the solution to a problem that is plaguing them or helping them achieve their goals. You should have a clear, powerful, and distinctive value proposition to be able to perform in the marketplace.

Start with the Value Proposition and specify what the company's DNA is, then move to customers and then suppliers. Next fill in the cost and revenue sections. Use post it notes of one color, which will identify the status quo.

The Business Model Canvas

Designed for:

Designed by:

Date:

Version:

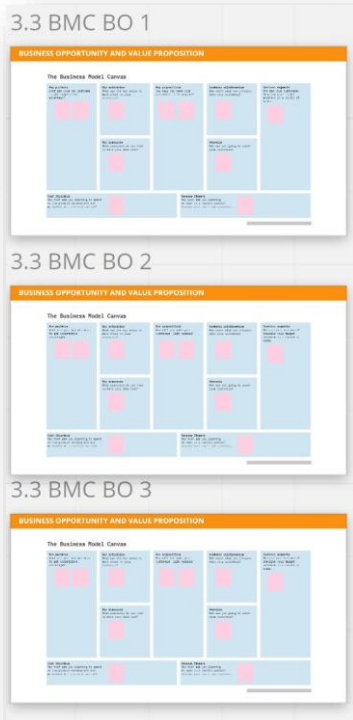
Key Partners <small>Who are our partners? Who can we partner with? What can we learn from our partners? What can we do for our partners? What can we do for our partners? What can we do for our partners?</small>	Key Activities <small>What key activities do our Value Propositions require? Our Customers' Channels? Customer Relationships? Revenue Streams?</small>	Value Propositions <small>What value do we deliver to the customer? What is the benefit of the customer's problem? What is the benefit of the customer's problem? What is the benefit of the customer's problem? What is the benefit of the customer's problem? What is the benefit of the customer's problem?</small>	Customer Relationships <small>What type of relationship do we want with our customers? What type of relationship do we want with our customers? What type of relationship do we want with our customers? What type of relationship do we want with our customers? What type of relationship do we want with our customers? What type of relationship do we want with our customers?</small>	Customer Segments <small>For whom are we creating value? Who are our most important customers? Who are our most important customers? Who are our most important customers? Who are our most important customers? Who are our most important customers?</small>
Key Resources <small>What key resources do our Value Propositions require? Our Customers' Channels? Customer Relationships? Revenue Streams?</small>		Channels <small>Through which channels do our customers reach us? How do we reach our customers? How do we reach our customers? How do we reach our customers? How do we reach our customers? How do we reach our customers?</small>		
Cost Structure <small>What are the most important costs incurred in our business model? What are the most important costs incurred in our business model? What are the most important costs incurred in our business model? What are the most important costs incurred in our business model? What are the most important costs incurred in our business model? What are the most important costs incurred in our business model?</small>		Revenue Streams <small>For what value do our customers really willing to pay? For what value do our customers really willing to pay? For what value do our customers really willing to pay? For what value do our customers really willing to pay? For what value do our customers really willing to pay? For what value do our customers really willing to pay?</small>		

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The Experts of Customer Model Generation and Designing

strategyzer.com

Replicate the basic template on all three Business Opportunities (copy and paste post it)

Activity 2: Update the BMC for each of the Business Opportunities.



Use the Business Opportunities that you identified in the previous step to update the canvas and have a clearer understanding of the impact of the individual Business Opportunity on the business model. Use different colored post-it notes so that you can clearly identify what the difference is from the AS-IS.

At this stage, start paying attention to the lower end of the canvas as well and try to balance it. If the cost structure is too high and the revenue streams or benefits do not seem sufficient to you, you may want to think about an alternative business model or a closer look with the organization.

Form a hypothesis to validate with the organization during the meeting where you will discuss the choice of opportunity.

Since we believe X, if we do Y, we expect Z to happen.

These assumptions will be the basis on which you will design the critical function test to validate the business model.

Activity 3: Present the three Business Model Canvas to the enterprise.

Set up a meeting with organization, start with the description of the BM AS-IS and clearly identify the three opportunities by detailing the areas of the Canvas that are changed. Ensure that your assumptions are verified in your understanding of the organization and identify potential trouble spots together.

It may happen that the organization wants to implement all the opportunities that you are presenting to them, in case be proud of them and inform them that for exam this is not allowed Because you have a few weeks to close the project. Therefore, it is better to do one thing well than three things badly. Some times, parts of a discarded opportunity may flow into the one candidate for implementation. Carefully consider the effort required for integration and be shrewd in making commitments to the organization.

PLEASE NOTE: This is when you create the highest resolution expectations from the organization. You in this course are designers, not developers, web-designers, social media managers, communicators, warehouse workers or production workers--your job is to design, not to deliver. Aside from the critical function test, which will perhaps require you to build something and is for design purposes, the deliverables you will deliver to them will be "sheets" in which the solution and how to implement it will be described. Be very clear in this, so that you do not generate expectations with respect to artifacts that are not your responsibility. To understand, you will never produce the website but a document to be handed over to a web- agency to get a quote for the implementation of a website. At most, the quote if the web-agency tells you it will get it to you in a short time.

Activity 4: Business Model Canvas 2.0

Implement the feedback from the meeting into the BMC you have defined and you are ready for the next phase. At this point you are moving toward the area of least uncertainty, the area where you have a strategy and know what to do. The next natural step is to translate that strategy into action!

Mission 3.4 - Implementing Plan and Change Action.

Mindset

"Do. Or do not. There is no try."

- Master Yoda, The Empire Strikes Back

General Instructions

There is only one way to know if your product/service/process will succeed in the market and if your business model will work: DO IT.

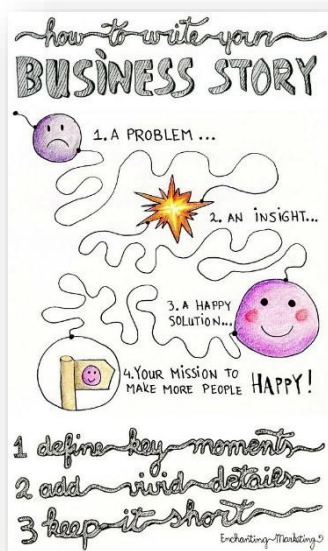
If you do not test your hypothesis in the organization, you will never know if your ideas were right. You may not fail, but you will definitely not succeed. By going quickly to market, you seriously run the risk of success -

It is only a question of when. When depends on the quality of your hypothesis, the tests you design, and the feedback loops you build to learn from your tests. If your product/service/process is not desired and the business model is weak, you will fail, but you will have gathered enough information to succeed the next time. If you fail early and fast, you will succeed sooner.

Writing and articulating the product/service vision marks a critical turning point in the project. This activity represents the transition from the "open exploration" phase of the project-primarily learning what the design space is and what might be possible-to decisions about what the system is likely to include. It involves defining the purpose of the project. Develop "the story" behind your exploration of the project-the paths explored, the decisions made and their rationale. Tell your story to other people as well to make sure they understand it. The integration of change within organizations is always a great challenge. This mission is critical to developing forward thinking and empathy for what the enterprise will face.

Tools

Activity 1: Solution Vision



A brief and engaging definition of your solution written in story form. What are you planning? Why is it the right thing to do? What can we expect after implementing the change? (Be brave, it is better to have a wrong vision than no vision at all).

Your vision should have a title, a name, a vision/goal statement (clear and compelling), perhaps a logo and visual identity, or anything else that can help others see and envision your vision. It should be similar to a startup presentation.

Gather all the insights and information you learned during your tests, reflect on the events you faced, and finally write a business story. A business story is a useful

tool for both internal reflection and external communication. A good business story takes the audience on your journey to change, gives them a sense of who you are, how hard you worked, what challenges you faced and how you courageously solved them. This tool helps you gain emotional buy-in from the audience while making sense of all the activities you have done previously.

Activity 2: Critical Function

A critical function ("x") of the final prototype represents a key experience that is completely finished and validated. Your goal is to design and test the most important function of the project in its final form. Choose one part of your design that, if implemented, will reassure you that everything else will be successful. You are not talking about a plan or an idea for something-but about developing a concrete test that is realistic. Real context, real size, real experience. From this prototype, you should be able to extrapolate the final functionality and scope of your project. This activity will force you to address some of the technical/implementation issues that you have not yet considered. This could include vendor and supplier issues or logistics issues, etc. It is important to do this now, before the project progresses further, so that you can evaluate the technical and experiential issues (e.g., user testing).

Your prototype should be:

Clear - From the critical function one must understand the value of the project.

Desirable - The direction of the project you have chosen is good. Your solution has the spark originality that people expect to see in a Change project.

Credible - Looking at what you have now will convince the "knowledgeable people" (i.e., your contacts) that you can implement what you propose. You will have identified what the major technical, supplier, and human problems will be. By the end of prototype testing you will know what you are doing and have concrete plans for moving forward.

Activity 3: impact - KPIs

How do you measure success? Identify KPIs, how to measure them, and how to collect data.

Activity 4: Economic Evaluation

Make a plan of how your product/service will go to market and perform a tentative profit and loss analysis. This analysis will help better allocate resources and plan a more efficient experiment (and understand early on some of the constraints the market will force you to face). Also highlight non-financial costs and benefits.

Mission 3.5 - Final Delivery and Roadmap.

Mindset

The only way to be truly satisfied is to do what you believe is great work - Steve Jobs

General Instructions

You have done it! You have designed a new business model and achieved product-market fit. Now it is time to pass the baton to the company and allow them to guide your wonderful new creature into their harbor.

This mission aims to present the final solution and identify the roadmap for its future implementation, in terms of emotional buy-in, ownership by the organization, and fundability. Storytelling is a crucial ingredient for engaging the business; however, the solution must be credible, desirable, feasible, and cost-effective.

You need to make this transition as smooth and clear as possible. The following activities may help you achieve this goal.

Delivery

1. **Final report** (executive summary of max 2 pages+ Report max 15 pages+ appendices miro tables) [PDF or DOC]
2. **Full room presentation** (all inclusive in 20 min) - The kind of presentation that shows your results and makes the audience fall in love with your project. The goal of this presentation is to convince the organization that your project is worth further development and implementation. [PPT or PDF]
3. **Video** max 3 min - trailer of the project, aims to be disseminated to the funding body and other stakeholders and entice them to learn more about the project. [NB. (PDF or DOC with link to content uploaded to folder].
4. **Final Infographic** - your final one-page solution with impact on KPIs... [PDF or JPG]

Tools

Activity 1: The First Step

Imagine the road the organization must travel to implement your solution, That is the first step to take?

Design this first step in as much detail as possible to minimize the organizational effort to start the project. Sometimes this step is a document to hand to a supplier to get a quote, sometimes a short presentation or video for management, sometimes a couple of quotes from which choose. It is rarely an activity that the team finds challenging, because it has behind it all the project. Instead, the enterprise starts from a different position, and if you leave it alone with a document there will take time before they are activated. If, on the other hand, you leave them an action to perform it will be much more easy for them to take the road.

Activity 2: Roadmap and Business Plan

Just as a doctor prescribes medication for patients to continue their treatment when they

go home from the hospital, so you must envision a program of activities that the company should take to continue moving forward with your solution.

Making a business plan allows you to gather all the prescriptions and learning you want to convey all in one place. The business plan needs to speak the funding body; it needs to be very clear about the sustainability of the project and the return over time. Make an investment plan and a two-year forecast income statement to build the economic and financial structure of the project.

Create a roadmap with also included the options that might open up and some guidelines for taking a direction. This roadmap should answer the question: how long do we take to implement this solution? After how long can we see the first results and enjoy the value?

Activity 3: Anylogic Model

In order to calculate the impact of your project on the KPIs you have defined, describe and set up a model in Anylogic. It is not always straightforward to understand how to use simulation within your projects; however, it is essential to measure yourself with this tool.

There are three opportunities:

#1 - Framing of the problem

Designers are used to identifying problems throughout the design process (Dorst, 2011).

Simulation in this context is used to understand the potential in terms of KPIs from addressing one particular challenge versus another. Or it can be used to frame the right problem to solve.

#2 - Innovation-value adaptation

"the extent to which target users perceive that use of innovation will foster (or, conversely, inhibit) the realization of their values." (Klein & Speer Sorra, 1996)

In this context simulation explores Innovation-Value Fit. What-if analyses can be done to learn about organizational resistance in the face of particular solutions and performance configurations. The what-if scenarios should delve into what is the users' perceived value of the proposed innovation.

#3. Integration of knowledge

"Knowledge integration is the concept of bringing together diverse knowledge and ideas, or the ability of a multidisciplinary team achieve knowledge integration. (Gardner et al. 2012).

In this context, simulation helps transform scenarios into potential viable solutions by verifiably defining achievable KPIs and analyzing potential systemic problems.

Activity 3: Full Sale Presentation Storyboard

Goal: Convince the company that your project is worth further development and implementation, demonstrate that it is consistent.

The presentation is a story about your solution. Gather all the insights and information you

learned during the tests, reflect on the events you faced and the learnings that surprised you during the project, and finally gather ideas for the final presentation.

In the final presentation, you will have to make the connection between the present and future. Talk about the solution and the results. What did you get from your tests? What did you learn? What worked and what didn't?

Then introduce the future! What are the next steps and why? Give a vision of the future and place your solution in a larger strategic framework. Your goal is to pass the baton, clearly identify responsibilities and discuss with respect to feasibility and concrete actions that need to happen for your solution to become a reality.

Once upon a time there

was__(Customer/user)_____.

Every day__(Need or problem statement)_____.

But one day__(Concept, idea)_____.

Because of that, __(New Experience/new reality)_____.

Because of that__(Benefits)_____.

Until finally __(The Future Steps)_____.

The following elements can help you in structuring your presentation

- Problem: What problem do you solve? Put a concise reframe of the problem you eventually addressed. Not the story of the project, but the challenge reframe that will then be addressed in the rest of the presentation
- Method: A concise illustration of the method that gives credibility to what is proposed
- Insight: What insight sparked the startup (or pivot) of the project?
- How did you solve it: What are you proposing to solve the problem?
- Does the customer/consumer benefit from the solution?
- Mission: What is the mission? Clarify the implications of the solution.



The final presentation takes audience on your journey, through the challenges you have overcome in the project, and the value of what you have achieved helps to gain emotional

buy-in from the audience as it makes sense of all the activities done previously.

Minimum structure*:

- Presentation of the problem
- Stakeholder needs
- Vision
- Solution concept
- Details of the solution
- Stakeholder benefits
- Resources needed implement the solution
- Appendix (to support you visually for any questions during the Q&A)

* *This is just a general draft, so it can be changed according your project*

Suggestions:

- Make it meaningful: before adding random content ask yourself "what do I want to communicate with this?", use the appendix for extras
- Make it engaging: surprise the audience, use different media: tell a story, show a video, role-play...
- Make it visual: design charts to represent complex systems and guide people through them. Transform working tools Miro such as maps and business models into simpler stories

Here is a check list to assess whether the presentation is effective:

- **Consistency:** bring evidence that is related to the challenge and eliminate the superfluous (does it meet the business need? Is the solution consistent with the user's need?)
- **Desirability:** show evidence against a real need that your solution addresses, make sure your solution differs from other competitor offerings
- **Feasibility:** focus on aspects crucial to feasibility and demonstrate that you have tested/planned for them: technology/user experience/key resources
- **Implementability:** show that your solution is economically feasible and implementable (business plan and roadmap the most interesting points)

Hint: benchmark case studies can be a test of feasibility/viability/desireability

NB: It is not the story of your project, it is the story of the solution!

Few people care what you have done; everyone cares what you have discovered.

Activity 4: Final Video

This video is the trailer for the project; it aims to be circulated to the funding body and stakeholders and entice them to learn more about the project. It should tend to be a viral video, which people circulate among themselves spontaneously.

With this video you need to **interest!** Stakeholders must want to find out more about your project.

NB: The viewer of this video does not necessarily care about the process and does not necessarily know the challenge. He has most likely not worked with you, so do not take his attention for granted.

Minimum structure*:

- Start with the opportunity
- What is your solution?
- What need do you address with your solution?
- What benefit do the stakeholders get?

* *This is just a general draft, so it can be changed according to your design*

Suggestions:

- **Clarity:** Your topic is not necessarily known to everyone: make sure it is clear what you are talking about and don't take anything for granted-the video can reach many people in a short time!
- **Impact:** use graphics to represent complex systems and make important concepts stand out;
- **Flow:** flow is important to capture your audience, capturing attention and credibility in the first few seconds: for example, it starts by having the audience identify with your users and their needs;
- **Engagement:** The audience has little attention: you have to be energetic to stand out!

Activity 5: Final Presentation Storytelling



FINAL PRESENTATION

**The kind of
presentation
that displays your
results and makes
the audience fall in
love with your
project**

We have talked at length about user-centered design, now it is time to apply what you have learned to your presentation-think carefully about who your audience will be. Target your presentation to your audience according to their roles and/or attitudes:

- Role: Company owner/ President/ Chief Operating Officer/ Head of R&D...
- attitude: dreamer who needs some sense of reality VS skeptic and pragmatist

Calibrate yourself for a presentation of about 20 minutes + Q&A. The interaction part at the end of the presentation is the most important part, which must be triggered by your presentation. You need to hear what they think about it and how they plan to continue the project, so that you can incorporate the latest changes into the material you will deliver to them, if necessary.

The presentation requires careful preparation: each team member rehearses it in front of the others, who write down what works and what can be improved. Combine all the winning ideas and integrate the feedback into the presentation. Select the people who

work best in the exposition. In this, consider the audience and the time you have, the final presentation is not a time to show off, it is the time with the most responsibility for the team, because it determines the attention from the organization to your project.

Choose who presents the project accordingly.

At this point, presenters begin rehearsing the presentation, and with each iteration incorporate feedback from other team members both text and eloquence. Rehearse it until you can't take it anymore, then record yourself, review it at least a couple of times, then rehearse it again. Show it to someone outside the team, gather feedback, then try it again. Let a night go by, try it again, collect feedback, and you're ready!

Best of luck!

Activity 6: Final Report

15 +executive summary of max 2 pages+ appendices with Miro's tables inserted as images (Windows key + Shift + S).

The final report also gives you an opportunity to apply your human centered design skills for those who will have to read it. Imagine how important it is to describe your findings and the content of the project vs. the process. Reason about how important it is to curate the form, include diagrams and figures, and explain them by not assuming anything. Consider that the page limit has no restrictions on form, font, number of images, etc. etc. You can decide, obviously adding more content does not always lead to a more positive evaluation. Your paper must be interesting and in good Italian. Have someone from outside the project and integrate feedback, after looking carefully at the editing and rereading and correct you. Of course, cross-readings between different teams are also possible. You already have a lot of material because you have developed the first report. Devote a portion of the report (about 3 pages) to summarizing the challenge analysis and identifying the innovation needs and impacts of the solution. There is a lot of content in the presentation you have made that could be expanded and explained in the Report, including in light of the research and decisions you have undertaken.

Executive Summary (max 2 pages) - to be given to managers or funding agency, must represent the project in a nutshell, including benefits. Structure: Challenge, Analysis, Solution, Impact

Consider that the evaluation of your Report will be based on what is written in the Syllabus!



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