Why do we need design thinking?
... a new type of thinking is essential if mankind is to survive and move toward higher levels.

Telegram from Emergency Committee of Atomic Scientists with Albert Einstein as Chairman and the Federation of American Scientists, 1946.
design thinking

MINDSET

SKILLSET

TOOLSET
Mindset

The values, attitudes and resulting behaviors that allow the tools and skills to be effective. The mindset is the fundamental operating system of the creative thinker and distinguishes those leaders who enable creative thinking and innovation from those who shut it down.

Curiosity, deferral of judgment (emphasizing the positive rather than the negative), and taking the time to be reflective (allowing leaders to view issues from different perspectives or to catch nuances not readily apparent) are three of the components of an innovation mindset.

Skillset

A framework that allows innovation leaders to use their knowledge and abilities to accomplish their goals. More than tools and techniques, it requires facility, practice and mastery of processes.

Innovation leadership is required at all levels of the organization. Lower level project leaders manage their teams and the creative process, middle and functional managers ease collaboration between different groups and across organizational boundaries respectively, and top managers set an innovation strategy and institute a culture that encourages and enables innovation.

Toolset

The collection of tools and techniques used to generate new options, implement them in the organization, communicate direction, create alignment and cause commitment.

There are a variety of tools and techniques to help innovation leaders galvanize and enable the generation and implementation of creative ideas. For example, brainstorming and mind-mapping are two ways to free creative thinking from self-imposed constraints. Another example is simple prototyping, which is a technique for executing and testing ideas without massive investment.
design thinking

MINDSET

SKILLSET

TOOLSET

creative ideation; brainstorming; journey; mapping; service blueprints; deferring judgement; embracing ambiguity & complexity; putting people first; empathy; mastering tools; solving problems; working iteratively; rapid prototyping
People-Powered Innovation by Studio Science

- creative ideation; brainstorming
- journey mapping
- service blueprints
- rapid prototyping
- mastering toolsets
- diverging & converging
- working collaboratively; co-creating
- creative problem solving
- design thinking
- working iteratively
- deferring judgement
- embracing ambiguity & complexity
- putting people first; empathy

MINDSET

TOOLSET

SKILLSET

DESIGN THINKING
More than 60 years ago, F. Scott Fitzgerald saw, “the ability to hold two opposing ideas in the mind at the same time and still retain the ability to function” as the sign of a truly intelligent individual.

Focused on whole experiences, design thinking is integrative thinking

Conventional thinking versus integrative thinking

When responding to problems or challenges, leaders work through four steps. Those who are conventional thinkers seek simplicity along the way and are often forced to make unattractive trade-offs. By contrast, integrative thinkers welcome complexity—even if it means repeating one or more of the steps—and this allows them to craft innovative solutions.

Four stages of decision making

<table>
<thead>
<tr>
<th></th>
<th>1 Determining Salience</th>
<th>2 Analyzing Causality</th>
<th>3 Envisioning the Decision Architecture</th>
<th>4 Achieving Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Focus only on obviously relevant features</td>
<td>Consider one-way, linear relationships, between variables, in which more of A produces more of B</td>
<td>Break problems into pieces and work on them separately or sequentially</td>
<td>Make either-or choices; settle for best available options</td>
</tr>
<tr>
<td></td>
<td>Seek less obvious but potentially relevant factors</td>
<td>Consider multidirectional and nonlinear relationships among variables</td>
<td>See problems as a whole, examining how the parts fit together and how decisions affect one another</td>
<td>Creatively resolve tensions among opposing ideas; generate innovative outcomes</td>
</tr>
</tbody>
</table>
It is now widely recognized that design problems are ill-defined, ill-structured, or ‘wicked’... They are not problems for which all the information is, or ever can be, available to the problem-solver.

Nigel Cross, Designerly Ways of Knowing, *Design Studies*, 1982
Different disciplines have unique authentic ways of thinking

Compare and contrast different ways of thinking

<table>
<thead>
<tr>
<th>Design Thinking</th>
<th>Science Thinking</th>
<th>Business Thinking</th>
<th>Art/Humanities Thinking</th>
</tr>
</thead>
<tbody>
<tr>
<td>practicality, ingenuity, empathy, and a concern for ‘appropriateness’</td>
<td>objectivity, rationality, neutrality, and a concern for ‘truth’</td>
<td>reliability, logic, simplicity, profitability, and a concern for ‘value’</td>
<td>subjectivity, imagination, commitment, and a concern for ‘justice’</td>
</tr>
<tr>
<td>the built environment</td>
<td>the natural world</td>
<td>the economic market</td>
<td>the human experience</td>
</tr>
<tr>
<td>visual modeling, pattern-formation, synthesis</td>
<td>controlled experiment, classification, analysis</td>
<td>production of replicable outcomes, analysis</td>
<td>analogy, metaphor, criticism, evaluation</td>
</tr>
<tr>
<td>discover &gt; analyze &gt; ideate &gt; prototype &gt; evaluate &gt; decide &gt; implement &gt; repeat</td>
<td>identify problem &gt; observe phenomenon &gt; formulate hypothesis &gt; test &gt; analyze &gt; conclude</td>
<td>analyze &gt; decide &gt; implement</td>
<td>perceive &gt; ideate &gt; create &gt; reflect</td>
</tr>
<tr>
<td>people (end users)</td>
<td>the body of scientific knowledge</td>
<td>financial markets, boards of directors, senior management</td>
<td>the self</td>
</tr>
<tr>
<td>experiential insight, qualitative models</td>
<td>logic, quantitative models</td>
<td>logic, quantitative models</td>
<td>emotional insight</td>
</tr>
<tr>
<td>mistakes are learning experiences</td>
<td>mistakes are errors</td>
<td>mistakes are not tolerated</td>
<td>mistakes do not exist</td>
</tr>
<tr>
<td>a problem is the start of the process</td>
<td>a problem informs the creation of a hypothesis</td>
<td>a problem is something to get out of the way</td>
<td>there are no problems</td>
</tr>
</tbody>
</table>
How we think determines what we see and feel.
What do you see when you look through different disciplinary lenses?
Different disciplines have unique authentic ways of thinking

Practice different ways of thinking

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<th>Business Thinking</th>
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<tbody>
<tr>
<td>practicality, ingenuity, empathy, and a concern for 'appropriateness'</td>
<td>objectivity, rationality, neutrality, and a concern for 'truth'</td>
<td>reliability, logic, simplicity, profitability, and a concern for 'value'</td>
<td>subjectivity, imagination, commitment, and a concern for 'justice'</td>
</tr>
<tr>
<td>Christopher is frustrated when he is unable to log into his healthcare provider’s online portal at 2 in the morning.</td>
<td>Christopher's body has more fat mass than muscle mass. He may be at risk for high blood pressure or high cholesterol.</td>
<td>Christopher is 50 years old, single, with no kids. He may be seeking investment options for retirement planning.</td>
<td>Christopher may be pondering the meaning of life.</td>
</tr>
</tbody>
</table>
How does your organization’s mindset affect how you approach customer insight data?

Map your team’s attitudes to uncover potential challenges to success.
Assess your organization’s attitudes about customer insights

Too Much Data = Poor Insights

Faced with a constant fire hose blast of customer insight data, many of today’s marketing practitioners are overwhelmed. There’s just too much to take in. And as a result, they’re having to triage customer information just to get through their day.

It’s more than just figuring out how to streamline data technology resources. It’s about coming to an honest assessment of how an organization gathers and, crucially, acts upon the customer information at its disposal.

Mapping Attitudes Towards Customer Insight

One invaluable approach you can take to get a better understanding of your own organization’s customer insights culture is to create a map of your team and/or individual team member attitudes towards customer information and how it is used and consumed.

This process is bound to reveal that every organization is peopled with individuals and groups with diverse and often divergent opinions about the value of customer research.

In setting up your customer insight attitude map, try to objectively determine where each of your team members falls within each these four key persona components:

- Streamliners vs. Aggregators
- Executive Summary Readers vs. Full Story Seekers
- Fearers of Change vs. Active Explorers
- Gatekeepers vs. Sharers

Now What?

The insights that can be gleaned from an attitude mapping exercise of this nature are often eye-opening, as the depth and breadth of the divergences are usually unexpected and difficult to grasp from a management perspective.

However, rather than despair at the findings, you should feel confident the map will help you balance these differences as you structure your internal teams and challenge them to set goals to meet bigger marketing objectives — objectives that are guided by a comprehensive understanding and appreciation of your organization’s customers and what motivates them to remain customers over time.
Streamliners vs. Aggregators

Streamliners are those who believe that a single source of robust consumer analytics should be sufficient to allow them to segment, profile, target and attribute all customers. These folks tend to have a heavy bias towards quantitative data because of the promise (and sometimes illusion) of certainty that comes from large data samples. They don’t like having to draw from multiple sources because they strive for standardization.

On the other side of this persona component are the Aggregators — individuals and groups who believe that the customer experience cannot be reduced to a single quantitative set of data. These people tend to feel that the best marketing strategies emanate from the analysis of multiple layers of customer information. They see value in both quantitative and qualitative information.

Executive Summary Readers vs. Full Story Seekers

Executive summary readers are those individuals — or teams — who don’t have the time, patience or knowledge to understand the full customer insight picture. Nor do they really want any explanation of the research methodology involved. If they trust the authority of a research report, they’re usually happy to take an executive summary and apply it to their area of responsibility.

Conversely, Full Story Seekers are those individuals and teams who hunger for a richer customer insight story and want to consume research reports in their entirety. They often want to dive into specific pieces of information/data and will sometimes question the limits of the findings.
### Fearers of Change vs. Active Explorers

Fearers of Change are those who want only to maintain and rely on existing and known sources of customer information. They’re skeptical of any customer insights drawn from external data sources, especially if those insights don’t gel with status quo strategies.

Active Explorers, meanwhile, are those who get excited (and perhaps distracted) by the world of untapped customer information they could potentially be using to inform their marketing decisions. They are less loyal users of existing data sources.

### Gatekeepers vs. Sharers

Information Gatekeepers want to exercise their control over who has access to and use of customer insight information. Gatekeepers can serve an important role by helping to breed specialization and support quality control within an organization. However, their actions can also discourage critical thinking and lead to misunderstandings over strategic objectives among team members who aren’t given access to the story behind the data.

Sharers are those individuals who advocate for broad organizational access to customer information so that it can be analyzed and used to make better-informed marketing decisions. The downside of this approach is that customer insights can become shared too widely and used with little discipline, leading to negative outcomes.
design thinking

MINDSET

SKILLSET

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creative ideation; brainstorming journey mapping service blueprints deferring judgment embracing ambiguity & complexity putting people first; empathy mastering toolsets creative problem solving working collaboratively; co-creating diverging & converging
People-Powered Innovation by Studio Science  |  19

Creative ideation; brainstorming

Journey mapping

Service blueprints

Mastering toolsets

Rapid prototyping

Design process

Creative ideation; brainstorming

Embracing ambiguity & complexity

Deferring judgement

Putting people first; empathy

Working collaboratively; co-creating

Working iteratively

Diverging & converging

Mastering toolsets

Design thinking

Skillset

Toolset

Mindset
The process of the design thinker... looks like a rhythmic exchange between the divergent and convergent phases, with each subsequent iteration less broad and more detailed than the previous ones.

Tim Brown, Founder, IDEO
Every step of a design thinking process requires a phase for seeking multiple perspectives, ideas and options before evaluating options and making decisions.

**Active divergence**
- Skills to seek new opportunities for change and improvement
- Skills to constructively engage in ambiguous situations
- Skills to find potential relationships between facts and beyond known facts

**Active deferral of judgment**
- Skills to separate the processes of diverging on potential ideas and converging on potential solutions
- Skills to defer action to seek out more facts / ideas
- Skills to try unusual approaches

**Active convergence**
- Skills to take reasonable risks to proceed on an option instead of waiting for the ‘perfect’ answer
- Skills to help team reach consensus by viewing differences of opinion as helpful rather than as hindrances
...we need to invent a new and radical form of collaboration that blurs the boundaries between creators and consumers. It’s not about “us versus them” or even “us on behalf of them.” For the design thinker, it has to be “us with them.”

Tim Brown, Founder, IDEO
Creative problem solving requires collaboration, diverse process skills and work styles

Process skills and work style preferences as roles

**Generator**
Senses all kinds of problems and opportunities.
Views situations from many different perspectives.
Sees relevance in almost everything.
Comfortable with ambiguity.
Interested in people’s problems.
Every new solution suggests several new problems.
Willing to let others take care of details, but dislikes delegating the complete problem.

**Conceptualizer**
Forms quick connections, defines problems, conceptualizes new ideas and opportunities.
Distills seemingly unrelated observations into an integrated explanation.
Doesn’t like proceeding until situation is fully understood.
Wants the theory to be sound and precise.
High appreciation of ideas, less concern with moving to action.
Likes to visualize the “big picture.”

**Optimizer**
Turns abstract ideas into practical solutions and plans.
Likes situations where there is a single correct answer.
Can sort through large amounts of data and pinpoint “what’s wrong” in a given situation.
Lacks patience with ambiguity.
Likes to focus on a few specific problems.
Prefers not to spend much time thinking about other ideas and points of view, or how different problems relate to one another.

**Implementer**
Enjoys getting things done and becoming involved in new experiences.
Excels in adapting to specific immediate circumstances to “make things work somehow.”
Likes to try things out rather than “mentally test” them.
A risk taker: doesn’t need to completely understand something before taking action.
Enthusiastic and at ease with people, but can appear impatient or even “pushy” in moving to action.
Step 1: Team Member Profile
Work Style Preferences

Read across each **row** and assign a value to each word:

Assign a **4** to the word that **best** characterizes your style when solving problems;
Assign a **3** to the word that **next best** characterizes your style when solving problems;
Assign a **2** to the next most appropriate word;
Assign a **1** to the word that **least** characterizes your style when solving problems.

Be sure to assign a different number to each word in each horizontal row. Do not allow any ‘ties’ in any row.

**Every row must include a 4, 3, 2, and 1.**

<table>
<thead>
<tr>
<th>Your name:</th>
<th>Alert</th>
<th>Poised</th>
<th>Ready</th>
<th>Eager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>Diligent</td>
<td>Forceful</td>
<td>Prepared</td>
<td></td>
</tr>
<tr>
<td>Doing</td>
<td>Childlike</td>
<td>Observing</td>
<td>Realistic</td>
<td></td>
</tr>
<tr>
<td>Experiencing</td>
<td>Diversifying</td>
<td>Waiting</td>
<td>Consolidating</td>
<td></td>
</tr>
<tr>
<td>Reserved</td>
<td>Serious</td>
<td>Fun-loving</td>
<td>Playful</td>
<td></td>
</tr>
<tr>
<td>Trial &amp; Error</td>
<td>Alternatives</td>
<td>Pondering</td>
<td>Evaluating</td>
<td></td>
</tr>
<tr>
<td>Action</td>
<td>Divergence</td>
<td>Abstract</td>
<td>Convergence</td>
<td></td>
</tr>
<tr>
<td>Direct</td>
<td>Possibilities</td>
<td>Conceptual</td>
<td>Practicalities</td>
<td></td>
</tr>
<tr>
<td>Involved</td>
<td>Changing Perspectives</td>
<td>Theoretical</td>
<td>Focusing</td>
<td></td>
</tr>
<tr>
<td>Quiet</td>
<td>Trustworthy</td>
<td>Responsible</td>
<td>Imaginative</td>
<td></td>
</tr>
<tr>
<td>Implementing</td>
<td>Visualizing</td>
<td>Describing</td>
<td>Zeroing-In</td>
<td></td>
</tr>
<tr>
<td>Hands-On</td>
<td>Future-Oriented</td>
<td>Reading</td>
<td>Detail-Oriented</td>
<td></td>
</tr>
<tr>
<td>Physical</td>
<td>Creating Options</td>
<td>Mental</td>
<td>Deciding</td>
<td></td>
</tr>
<tr>
<td>Impersonal</td>
<td>Proud</td>
<td>Hopeful</td>
<td>Fearful</td>
<td></td>
</tr>
<tr>
<td>Practicing</td>
<td>Transforming</td>
<td>Thinking</td>
<td>Choosing</td>
<td></td>
</tr>
<tr>
<td>Handling</td>
<td>Speculating</td>
<td>Contemplating</td>
<td>Judging</td>
<td></td>
</tr>
<tr>
<td>Sympathetic</td>
<td>Pragmatic</td>
<td>Emotional</td>
<td>Procrastinating</td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>Novelizing</td>
<td>Reflection</td>
<td>Making Sure</td>
<td></td>
</tr>
</tbody>
</table>
Step 2: TALLY
Work Style Preferences

**FIRST, draw lines to disregard responses in Rows 1, 2, 5, 10 and 14.**
These were ‘control’ questions that are not tallied in your final results.
See example below.

**ADD the remaining numbers in each column.**

<table>
<thead>
<tr>
<th>Row 1</th>
<th>Alert</th>
<th>Poised</th>
<th>Ready</th>
<th>Eager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Row 2</td>
<td>Patient</td>
<td>Diligent</td>
<td>Forceful</td>
<td>Prepared</td>
</tr>
<tr>
<td>Row 5</td>
<td>Doing</td>
<td>Childlike</td>
<td>Observing</td>
<td>Realistic</td>
</tr>
<tr>
<td></td>
<td>Experiencing</td>
<td>Diversifying</td>
<td>Waiting</td>
<td>Consolidating</td>
</tr>
<tr>
<td>Row 10</td>
<td>Reserved</td>
<td>Serious</td>
<td>Fun-loving</td>
<td>Playful</td>
</tr>
<tr>
<td></td>
<td>Trial &amp; Error</td>
<td>Alternatives</td>
<td>Pondering</td>
<td>Evaluating</td>
</tr>
<tr>
<td></td>
<td>Action</td>
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<td>Abstract</td>
<td>Convergence</td>
</tr>
<tr>
<td></td>
<td>Direct</td>
<td>Possibilities</td>
<td>Conceptual</td>
<td>Practicalities</td>
</tr>
<tr>
<td></td>
<td>Involved</td>
<td>Changing Perspectives</td>
<td>Theoretical</td>
<td>Focusing</td>
</tr>
<tr>
<td>Row 14</td>
<td>Quiet</td>
<td>Trustworthy</td>
<td>Responsible</td>
<td>Imaginative</td>
</tr>
<tr>
<td></td>
<td>Implementing</td>
<td>Visualizing</td>
<td>Describing</td>
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<tr>
<td></td>
<td>Contact</td>
<td>Novelizing</td>
<td>Reflection</td>
<td>Making Sure</td>
</tr>
</tbody>
</table>

[^1]
Step 3: Map Work Style Preferences

Plot the tally from each COLUMN on the appropriate line segment of the graph.

THEN draw an egg shaped bubble to connect the points you plotted for each column. See example on next page. The bubble represents the depth and breadth of your preferences for generating, conceptualizing, optimizing and implementing. Read the descriptions on the previous pages to learn more about the styles. Does this seem like it fits? People are unique and complex. It’s possible that this doesn’t fit how you think and work. Let’s talk!
Step 3: Sample Work Style Preferences

Plot the tally from each COLUMN on the appropriate line segment of the graph.

THEN draw an egg shaped bubble to connect the points you plotted for each column. See example on next page. The bubble represents the depth and breadth of your preferences for generating, conceptualizing, optimizing, and implementing. Read the descriptions on the previous pages to learn more about the styles. Does this seem like it fits? People are unique and complex. It’s possible that this doesn’t fit how you think and work. Let’s talk!

SAMPLE — Assume your totals were
Column 1 = 28
Column 2 = 33
Column 3 = 45
Column 4 = 38
People-Powered Innovation by Studio Science

Creative ideation; brainstorming
Journey mapping
Service blueprints

Design process
Creative ideation; brainstorming
Journey mapping
Service blueprints

MINDSET
Deferring judgement
Embracing ambiguity & complexity
Putting people first; empathy

TOOLSET
Design thinking
Process
Working iteratively
Rapid prototyping

SKILLSET
Mastering toolsets
Diverging & converging
Working collaboratively; co-creating
Creative problem solving
The principles of design thinking matter more than the specific process of design thinking:
Human rule— all design is social in nature;
Ambiguity rule— design thinkers must preserve ambiguity;
Re-design rule— all design is re-design;
Tangibility rule— making ideas tangible facilitates thought.

adapted from Christoph Meinel and Larry Leifer, of the HPI-Stanford Design Thinking Program
Learn about the audience for whom you are designing, by observation and interview. Who is my user? What matters to this person?

Create a point of view that is based on user needs and insights. What are their needs?

Brainstorm and come up with as many creative solutions as possible. Wild ideas encouraged!

Build a representation of one or more of your ideas to show to others. How can I show my idea? Remember: A prototype is just a rough draft!

Share your prototyped idea with your original user for feedback. What worked? What didn’t?

**Design-Thinking for Innovation**

1. Define the challenge/opportunity
2. Gather data
3. Re-frame/clarify challenge
4. Incubate
5. Ideate/illuminate
6. Evaluate/Refine
7. Prototype/test
8. Assess outcomes/refine
9. Implement
10. Iterate
I began to see that there were two parts to being effective... one part was being versed in content—knowledge about your job—the ”what“. The other part was being versed in process—having skills in ”how“ you do your job.

Dr. Min Basadur, Simplex, A Flight to Creativity, 1994
A scalable transferable innovation process: ‘Simplex’

1. Problem finding
   - Focus only on obviously relevant features

2. Fact finding
   - Consider one-way, linear relationships, between variables, in which more of A produces more of B

3. Problem definition
   - Break problems into pieces and work on them separately or sequentially

4. Idea Finding
   - Make either-or choices; settle for best available options

5. Evaluating & selecting
   - Focus only on obviously relevant features

6. Action planning
   - Consider one-way, linear relationships, between variables, in which more of A produces more of B

7. Gaining acceptance
   - Break problems into pieces and work on them separately or sequentially

8. Taking action
   - Make either-or choices; settle for best available options
While exact practices vary, there are six foundational behaviors that drive innovation work. We call them the Six Principles to Work Differently.

Innovators’ Guidebook, Center for Care Innovation’s Safety Net Innovations program, 2013
Aligning a complementary framework: ‘Work Differently’

1. See + Experience
   Focus only on obviously relevant features

2. Dimension + Diagram
   Consider one-way, linear relationships, between variables, in which more of A produces more of B

3. Question + Reframe
   Break problems into pieces and work on them separately or sequentially

4. Imagine + Model
   Make either-or choices; settle for best available options

5. Test + Shape
   Focus only on obviously relevant features

6. Pitch + Commit
   Consider one-way, linear relationships, between variables, in which more of A produces more of B
Our research also shows that performance on journeys is more predictive of business outcomes than performance on touchpoints is.

Then: Funnel Metaphor

For years, marketers assumed that consumers started with a large number of potential brands in mind and methodically winnowed their choices until they’d decided which one to buy. After purchase, their relationship with the brand typically focused on the use of the product or service itself.

New research shows that rather than systematically narrowing their choices, consumers add and subtract brands from a group under consideration during an extended evaluation phase. After purchase, they often enter into an open-ended relationship with the brand, sharing their experience with it online.

Now: Decision Journey

In the classic journey, consumers engage in an extended consideration and evaluation phase before either entering into the loyalty loop or proceeding into a new round of consideration and evaluation that may lead to the subsequent purchase of a different brand.

The new journey compresses the consider step and shortens or entirely eliminates the evaluate step, delivering customers directly into the loyalty loop and locking them within it.

From Customer Journey Maps to Customer Experience Maps

With the rise of customer experience design in the last years, traditional customer journey maps have been evolving into experience maps. An experience map visualises the customer’s steps before, during and after using a service (i.e. the customer journey), and when and how the customer interacts with the touchpoints of the service provider. They moreover serve as a visualisation tool for needs, emotions and circumstances of the customer as well as relevant dimensions from the perspective of the service provider. This makes experience mapping a very useful customer centred design technique that results in a visual and holistic representation of the entire service sequence.
Rather than providing constraining instructions, these six core questions will provide the structure to make appropriate decisions. After all, each unique problem asks for a unique approach and a unique solution. There is no such thing as a ‘one size fits all’ customer map.
Which goal(s) do I want to achieve by using an experience map?

The creation of an experience map is never a goal in and of itself; experience maps are tools to achieve a certain purpose. As eloquently described by Chris Risdon, Head of Design at Capital One: “A good experience map feels like a catalyst, not a conclusion.”

Answering this first core question will provide the service designer with insights about the purposes, requirements and limitations of experience mapping.

Who are the stakeholders?
What type of customer will the map be based on?
Does the content need to be based on thoroughly-validated data, or are assumptions allowed?
What will the map be used for?
And, maybe most importantly, why create an experience map at all?

Rather than providing a list of map types that the service designer would have to force-fit into the project’s unique context, we chose to provide an overview of possible purposes of experience mapping to inspire designers:

To understand the customer.
To compare customers.
To emphasise the customer’s importance.
To facilitate discussion/brainstorming.
To align understanding.
To map the current customer experience.
To identify opportunities/priorities.
To map the ideal customer experience.
To manage customers’ expectations.

Which structure should my experience map have to achieve my goal(s)?

Each customer experience consists of multiple dimensions that constitute the experience, such as needs, emotions, and touchpoints.

It is important to identify which building blocks are needed to build the map. Which aspects of the customer experience should be visualised? Which aspects of the service provider’s business are relevant for the customer experience?

Which dimensions need to be included to clearly communicate the map’s message? Which dimensions are most important to show?

Answering these questions will provide a clear focus on the upcoming research and co-creation, and on how to achieve the goal(s) set earlier.

We identified a small number of basic dimensions that we often apply:

- **Customer needs**: what the customer needs to achieve his goals.
- **Customer emotions**: what the customer feels, or wants to feel, during each step in the service experience.
- **Touchpoints**: when and how (e.g. on which device) the customer interacts with the service provider to fulfil a specific need.
- **Business needs**: what the service provider needs to achieve his goals (e.g. resources, funding, or information).

What do I need to learn about the customer?

Before filling in the experience map, the service designer needs to get to know the customer through customer research. The dimensions chosen earlier will provide the focus of this research. For example, if the map needs to show ‘customer needs’, the customer research should explicitly focus on uncovering these needs. Which aspects of the customer (experience) still need to be uncovered?

What are the customer journey phases? Which qualitative techniques should be used? And which quantitative techniques?

How do I determine the content of my experience map?

At this point the purpose of the experience map is chosen, and a hypothesis has been formed about the structure of the experience map. The horizontal axis contains rough customer journey phases, while the vertical axis contains the previously selected dimensions. The time has come to fine-tune this structure and to start filling the experience map with content.

What should my experience map look like?

The challenge is to visualise these results in a compelling way. What message should the map convey? What should be immediately clear at first glance? Which details may be discovered after closer inspection? The map should communicate the takeaways (such as strategic insights or recommendations), the highs (delight points) and lows (pain points) of the customer experience, and the moments of truth (the moments that make or break the experience). Sketching is a good way to explore different types of visualisations. There are no fixed rules – experience maps come in all shapes and sizes.

How will I use my experience map?

This final core question should be easy to answer, as the goal of the experience map has already been defined in the first stage of the process. Essentially, answering this question means reviewing the goal(s) that the service designer wants to achieve.

The map may be used to identify opportunities, align stakeholders, evaluate design, fix pain points, or something entirely different. The key point here is that the map should be a living artefact after its creation, to be updated and to be referred to during the design process, and to be used as input for next steps in the project.
Stop trying to delight your customers.

To really win their loyalty, forget the bells and whistles and just solve their problems.

Stop Trying to Delight Your Customers, Harvard Business Review, August 2010
When we buy a product or select a service provider, we essentially ‘hire’ it to help us do a job.

**What a customer is trying to accomplish can be called the "jobs to be done."**

**Getting a handle on the jobs to be done**

“Job” is shorthand for what an individual really seeks to accomplish in a given circumstance. But this goal usually involves more than just a straightforward task; consider the experience a person is trying to create.

EXAMPLE: What the condo buyers sought was to transition into a new life, in the specific circumstance of downsizing—which is completely different from the circumstance of buying a first home.

Circumstances are more important than customer characteristics,

EXAMPLE: Before they understood the underlying job, the developers focused on trying to make the condo units ideal based on demographic insights. But when they saw innovation through the lens of the customers’ circumstances, the competitive playing field looked totally different. For example, the new condos were competing not against other new condos but against the idea of no move at all.

Jobs are never simply about function—they have powerful social & emotional dimensions.

EXAMPLE: Creating space in the condo for a dining room table reduced a very real anxiety that prospective buyers had. They could take the table with them if they couldn’t find a home for it. And having two years’ worth of storage and a sorting room on the premises gave condo buyers permission to work slowly through the emotions involved in deciding what to keep and what to discard. Reducing their stress made a catalytic difference.

adapted from Know Your Customer’s Jobs to Be Done, Harvard Business Review, September 2016
Getting a handle on the jobs to be done

FUNCTIONAL DIMENSION

What I want to accomplish and how I do it

PERSONAL DIMENSION

How I want to feel about myself by accomplishing the job

SOCIAL DIMENSION

How I want to be perceived by others

Steps within a customer job to be done

- **Define**
  - Customers define goals and plan resources

- **Locate**
  - Customers gather items and info needed to do job

- **Prepare**
  - Customers set up environment to do the job

- **Confirm**
  - Customers verify that they’re ready to perform job

- **Execute**
  - Customers carry out the job

- **Monitor**
  - Customers assess whether the job is being successfully executed

- **Modify**
  - Customers make alterations to improve execution

- **Conclude**
  - Customers finish the job
**Conduct an interview to discover jobs to be done**

In the real world you can pair interviews with observations to gain even more insights

“When I am ________, I want to __________.”

**CONTEXT**
What I do

**EXPECTATION**
What I want to accomplish

**SUCCESS METRIC**
How I want to feel about myself by accomplishing the job

“I know I am successful when ________ and when ________.”

**SUCCESS METRIC**
How I want to be perceived by others

In the real world you can pair interviews with observations to gain even more insights.
LEARN MORE
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Harvard Business Review
How successful leaders think

Harvard Business Review
The truth about customer experience

Harvard Business Review
Competing on customer journeys

Harvard Business Review
Marketing malpractice

Harvard Business Review
Stop trying to delight your customers

Harvard Business Review
Know your customers jobs to be done
MASTER
THE
MINDSET
SKILLSET
TOOLSET
The following worksheets are provided to allow you to cycle through the design thinking process to gain practice.

First, look at the sample provided. Then, use the process by yourself to diverge and converge to find new solutions to improve a situation in your own life. Budget 3 to 5 hours to work the process from start to finish.

Once you’ve experienced design thinking from problem finding to taking action, set up a collaborative session for your team to work on an internal project using the process. The worksheets include prompts for you to try more tools to bring new perspectives to your creative problem solving.
Before you use a design thinking process to tackle a complex problem with other people, apply the design thinking process at a smaller scale to improve your own life.
Example of using a design thinking process to improve a situation in one’s own personal life

Step 1: Problem Finding

Start this step by sensing and anticipating “problems.” Call these problems “fuzzy situations” to emphasize that you shouldn’t prematurely assume anything about them.

A. Diverge

Let’s start by setting aside judgment. Use the prompter questions to list fuzzy situations that you might like the address. Practice your process skill of active divergence to come up with more than 5 fuzzy situations.

1. Selecting vacation site
2. One of the children falling behind in school
3. Completing Master’s degree
4. Improving my poker game
5. Anticipating inheritance from 99-year-old Uncle Bill
6. Pressure from wife to purchase a larger home

B. Converge

Now practice your process skill of active convergence. Select one problem that truly interests you and that you’d like to resolve soon. Since you’re trying to develop your skill, make sure the problem you select is neither the most difficult you’ve ever raced nor the most trivial. Describe the problem in writing in 15 words or less. Don’t include a lot of detail. And don’t try to solve it right away—remember that your fuzzy situation is merely a starting point.

“I want to improve my poker game.”
Step 2: Fact Finding

A. Diverge

Now diverge again. List as many simple, specific, clear answers as you can to each of the following six fact finding questions. Defer judgment: don’t analyze your answers as you go, no matter how trivial or irrelevant they may appear. Try to capture complete thoughts in sentences.

1. What do you know, or think you know, about this fuzzy situation?

   1. We play once a month.
   2. There are seven people in our poker club.
   3. We rotate houses.
   4. We play for about 4 1/2 hours.
   5. We drink beer (about a six-pack each).
   6. We play nickel, dime and quarter stakes.
   7. Six of us are company employees.
   8. Two of the others work for me.
   9. We play dealer’s choice (lots of strange games).
   10. We play a three-raise limit up to a quarter for each raise.
   11. Last night was the only time I ever lost money.

2. What do you not know but wish to know about the situation?

   1. Was my losing luck- or skill-related?
   2. If I told my wife, would she be upset about this?
   3. Was anyone cheating?
   4. Were the cards marked?
   5. Would I have done better if I hadn’t drunk as much?
   6. Was this a one-time thing or will I lose frequently?

3. Why is this a problem, especially for you? Why can’t you make it go away?

   1. I don’t have enough spending money this month.
   2. I feel like a loser.
4. What solutions have you already tried or thought of trying?

1. Revert to more conservative behavior.
2. Shake it off and wait for the next time.
3. Cut out my kids’ allowance.
4. Take a little extra money out of my savings.

5. If this problem were resolved, what would you have that you lack now? What specifically would be different?

1. A plan to increase my winnings or cut my losses.
2. A way to win back the money I lost.

6. What might you be assuming, perhaps unnecessarily?

1. It’s normal for me to win (it may have been a fluke that I’ve won so often in the past).
2. Maybe the other players have been “letting” me win up to now.

B. Converge

Now converge again. Circle a few of the most intriguing facts on the above list. Look for the things that stand out as particularly meaningful or important, and that perhaps surprise you. There’s no special number to select, perhaps three or four.

1. Last night was the only time I ever lost money.
2. I wish I knew if my losing was luck-related or skill-related.
3. I don’t have enough spending money this month.
Step 3: Problem Definition

A. Initial Divergence

Defining your problem is so important that you actually diverge and converge twice in this step. Keeping your eye on your key facts, and setting aside your judgment, list several optional problem definitions.

Phrase each problem definition as a challenge beginning with, “How might I...?” (How might I find out how many employees have read our policy manual? How might I entice all employees to read our policy manual? How might I encourage all employees to teach each other the policy manual? How might I make our policy manual more interesting to read?) Write down at least seven such challenges.

A. “How might I become a better poker player?”
B. “How might I increase my winnings or cut my losses?”
C. “How might I be seen as a winner?”
D. “How might I maintain my normal playing style?”
E. “How might I best spend my free time?”
F. “How might I get through this month with less personal money?”

B. Initial Convergence

Now converge again. From your seven statements, select the one that you feel best represents your challenge at this point. Get ready to diverge a second time.

“How might I increase my winnings or cut my losses?”

C. Final Divergence

This time, you’ll diverge using the “why-what’s stopping” analysis. To begin, write down your selected “How might I?” challenge statement. Then ask yourself the question “why?”, that is, “Why do I want to meet this challenge?” For example, if your stated challenge is, “How might I find out how many employees have not read the policy manual?”, then your why question might be, “Why do I want to find out how many employees have not read the policy manual?” Next, answer your question in a simple, concise but complete sentence. In our example, perhaps an answer is, “I would learn how many employees probably don’t know our policies.” Write down your particular answer above your original challenge statement. (Keep in mind that these particular answers are only examples of countless other suitable possibilities.)

Now transform your answer into a new challenge. For example, the second statement above might be rewritten as “How might I quickly convey the policy manual’s contents to employees who have not read it?”
Write down this new challenge statement above the former one. (Again, this particular challenge is only one example of numerous possibilities.)

Now let's go the other way. Return to your original “How might I?” challenge statement. As yourself the question, “What's stopping me?”, that is, “What's stopping me from meeting this challenge?” In our example, the “what's stopping” question might be, “What's stopping me from finding out how many employees have not read the policy manual?” Perhaps the answer is, “I fear that, if I ask each employee outright whether or not they've read the manual, they may not tell the truth.” “Write down your particular answer below your original challenge statement.

Now, using your imagination, transform this answer into a new challenge, again beginning with the phrase “How might I?” In our example, a new challenge might be, “How might I put employees at ease when I ask them whether or not they’ve read the manual?” Write down this new challenge statement below the former one.

![Problem definition map]

(Why?)

(Why?)

(Why?)

(Why?)

(Why?)

(Why?)

(Why?)

What's stopping you?
You could do much more thorough analysis by asking “Why else would I want to...?”, or, “What else is stopping me...?”, several more times in both directions. And for each of the resultant challenges, you could repeat the why-what’s stopping questioning to create even more challenges. The more time you spend on this analysis, or the more frequently you repeat these powerful questions, the better you will understand your problem.

**D. Final Convergence**

Now it’s time to make your final convergence in this step. From all of the challenge statements in your “why-what’s stopping” map, select the one that you feel best describes your problem. (Incidentally, there’s nothing stopping you from selecting more than one challenge—except perhaps lack of time.) With your problem definition in hand, you’re ready to move from the problem finding stage of the Simplex process to the problem solving stage.

“How might I get through this month with less personal money?
### Step 4: Idea finding

#### A. Diverge

Now it’s time to diverge again. This time, you’re searching for answers rather than for questions. Write down your selected “How might I?” challenge statement.

“How might I get through this month with less personal money?

Lay aside your judgment. Brainstorm at least 10 potential solutions to meet this challenge. Keep your ideas simple and concise. Begin each statement with a verb to emphasize action. Deliberately create radical ideas that you can build upon. Think of ideas that would probably cost you your job, land you in jail, or at least get you into trouble. Prompt further ideas by asking yourself questions like: What new ideas might a friend offer? What ideas might a competitor offer? What ideas might your mother suggest? What would your worst enemy suggest (then reverse it)? What if you were flying a mile high on the back of a large bird and could see yourself below? What solutions might you see from that vantage point that aren’t obvious to you at ground level? What other points of view might you take to generate even more ideas?

<table>
<thead>
<tr>
<th>Ideas to Consider</th>
<th>Alternative Ideas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skip lunch</td>
<td>Eat at McDonald’s every night</td>
</tr>
<tr>
<td>Don’t smoke</td>
<td>Don’t eat out</td>
</tr>
<tr>
<td>Use charge card</td>
<td>Buy big jar of peanut butter</td>
</tr>
<tr>
<td>Borrow</td>
<td>Put wife to work</td>
</tr>
<tr>
<td>Rob bank</td>
<td>Ask your neighbor to help</td>
</tr>
<tr>
<td>Use bank loan</td>
<td>Get food stamps</td>
</tr>
<tr>
<td>Get second job</td>
<td>Cheat at cards</td>
</tr>
<tr>
<td>Have garage sale</td>
<td>Hold up variety store</td>
</tr>
<tr>
<td>Ask wife for money</td>
<td>Write bad checks</td>
</tr>
<tr>
<td>Sell good junk</td>
<td>Travel business rest of month</td>
</tr>
<tr>
<td>Dip into savings</td>
<td>Get a personal loan</td>
</tr>
<tr>
<td>Car pool</td>
<td>Go to credit union</td>
</tr>
<tr>
<td>Sell car</td>
<td>Join the army</td>
</tr>
<tr>
<td>Cut out kids’ allowance</td>
<td>Join the weekend reserves</td>
</tr>
<tr>
<td>Rob piggy bank</td>
<td>Test-drive cheaper car</td>
</tr>
<tr>
<td>Pool match</td>
<td>Drive cab at night</td>
</tr>
<tr>
<td>Sell can collection</td>
<td>Get gonations for poker fund</td>
</tr>
</tbody>
</table>
B. Converge

Now let’s converge on your ideas. Circle the four best bets. (There’s nothing magical about the number four, of course, but you should attempt to whittle down your list to a manageable number for further evaluation.) Remember to choose ideas that are concrete, that are easy to understand, that point the way to an easy next step, and above all, that aim directly toward solving your chosen challenge.

Skip lunch
Use charge card
Dip into savings
Skip haircut
Run NBA play-off pool and rake off profits
Pay bills late
Run garage sale
Step 5: Evaluate and select

A. Diverge

Now it’s time to evaluate your list of potential solutions. Ideally, you want to select one good candidate, or a combination of several. You might even end up with a modified version of one of your original ideas.

To get started, set aside your judgment again. List at least 15 potential criteria that you might use in measuring the worth of these selected solution ideas. Remember that useful criteria must be specific, clear and simple. Extend your effort to think of a wide range of criteria; don’t be too quick to home in. When you think you’ve finished, try to add five more potential criteria to your list.

Dollars saved
Time taken to do
Amount of personal sacrifice required
Long-range effects
Effect on peers
Effect on wife
Degree of concealment from wife
Effect on debt position
Degree of added benefits
Effect on spending
Effect on living standard
Legality
Morality
Effect on wife’s self-esteem
Ease of implementation
Probability of success
Degree of personal interest in idea
Effect on health
Effect on job
B. Converge

Now it’s time to converge. From your criteria list, circle four that you feel are most important. Make sure you know exactly what your selected criteria mean.

On the grid below, list your selected solution ideas vertically on the left, then list your selected criteria across the top. Using a simple numerical rating scale with 0 for poor, 1 for fair, 2 for good, and 3 for excellent, judge each solution in turn against the first criterion. Remember not to rank the solutions. Instead, rate each one individually. You may find all of your ideas are excellent or all are poor, or any conceivable combination. Then move on to your second criterion and repeat your evaluation procedure, and so on for the remaining criteria.

If you believe that some criteria are more important than others, you can weigh them accordingly to reflect their differing effects. Suppose you believe that the criterion of cost is three times as important as another criterion, say, implementation time. Simply multiply each of the cost ratings by three. (You might not have to weigh the criteria at all. Even if you do, remember that this is not intended to be a rigorous method. Its main intent is to help you carefully think through each of your ideas.)

If you wish, add up the ratings horizontally for each solution idea. These totals are useful guides to your final selection, but you’re not committed to any particular idea at this point. One of your lower scoring solutions may be the right one if you believe in it strongly enough to do what it takes to overcome the hurdles suggested by its low rating. For example, suppose a very good idea rated very low for cost, and very low for ease of gaining acceptance because of its extreme novelty, but was a super idea on all other counts. You might pick it, realizing that it will take a lot of creative persistence...
and hard work on your part to overcome these barriers. On the other hand, you might find that none of your selections are good enough. If so, return to the beginning of step four to generate new solution ideas. Or you can backtrack even further. Perhaps you missed important facts. On the other hand, you might like two solution ideas equally: perhaps there’s a way to combine them into a single solution.

Now write down your final selection below at the beginning of step 6 as your solution for action. Remember that you must know exactly what you mean by your solution. If there is any ambiguity in the solution, take the time to clarify it. Having reached a solution, you’re ready to move into the next phase of the Simplex process, solution implementation.

Run NBA play-off pool and rake off profits
Step 6: Planning action

*Run NBA play-off pool and rake off profits*

Now let’s continue our diverging/converging process into the implementation phase. Remember that your ultimate goal is to take action, creating a valuable change. You need to exercise just as much creativity in these last three steps as in the first five.

**A. Diverge**

Begin diverging again. Keeping an eye on your chosen solution, write down at least one answer to each of the following six questions:

1. *What new problems might this idea create?*

   *We may be seen as a gaming house.*

2. *Where might you encounter difficulties with this idea?*

   *This may be illegal.*

3. *Who might be negatively affected by this idea?*

   *People who don’t win the play-off pool.*

4. *Who would benefit from this idea?*

   *Everyone would have fun.*

5. *How might you introduce this idea?*

   *At break.*

6. *When might be the best time to introduce this idea?*

   *Late in the week when everyone’s looking forward to the weekend.*
Now continue diverging. Imagine yourself alone in a movie theatre, watching yourself on the screen as you successfully implement your solution idea, creating a valuable change. What are you saying, hearing and doing? Who else is in the movie? What are they doing and saying? Where is the movie taking place? When? How do you feel as you watch? It’s important to visualize yourself taking specific actions with specific results. Write down your answers to these questions.

*The whole gang is smiling and shaking my hand and saying what a great idea this play-off pool is*

Let’s diverge further. Putting aside your judgment, quickly list at least 10 simple steps that you might take toward putting yourself into the movie scene. Don’t worry about getting the steps in any “correct” order. Include even unusual steps. Write down each thought as it occurs to you. Prompt yourself with questions like, Whom could I call? What could I buy? Where could I go? What would I need?

*Develop entry form*

*Collect money*

*Determine game schedule*

*Copy entry form*

*Evaluate winner*
**B. Converge**

Now it’s time to converge. From this list of possible actions, circle the one you believe you should do first. Make sure it starts with an action work and is simple, clear and specific. On the action plan below, write this action under the heading “What will be done.” However, make sure you don’t write it as number one, two or three. Write it as perhaps the third or fourth step so you leave space both above and below it on the action plan: you may discover earlier necessary actions as you build your action plan.

Now write your own name under the heading “By Whom” for this first step. Then fill in the blank under the heading “How it will be done.” This makes your action step more specific. For example, if your action step were to call a meeting, you would specify how you would call that meeting: by phone; by checking a list of meeting candidates with your boss; by delegating the task to someone else. Under the heading “When,” write down a specific date and time for taking this action. Then under the heading “Where,” write down the specific place in which you plan to take the action.

You’ll likely think of further action steps that should be carried out either just before or just after your first step. In either case, repeat the procedure above. Perhaps you can nail down only a few action steps right now—subsequent actions might depend on how your first steps turn out. Leave room for exercising creativity as your action plan unfolds. Recall the famous adage: Plan your work and work your plan.

You now have a simple plan for implementing your chosen solution.
Step 7: Gaining acceptance

**A. Diverge**

It’s quite likely that your action plan included getting support or approval from at least one other person. Whose approval might you need? Whose support might you need? Write one of the most important names below.

No one but myself

Continue diverging. Might your idea solve any of this person’s problems? Pick one of the most important problems and write it down here.

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Clarify the Benefits</th>
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Diverge again. Write down three benefits that this person would derive if your solution were implemented. Now converge. For each of the three benefits, write down at least one way in which you might illustrate or prove the benefit or in which you might clarify the benefit for this key person.

Now list at least three objections that you anticipate this key individual might raise to your solution. Remember that new idea cause discomfort for all of us. Converge again. For each objection, write down at least one way in which you might show the person how it can be overcome or minimized.

<table>
<thead>
<tr>
<th>Objections</th>
<th>Overcoming the Objections</th>
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You can tailor similar plans for each individual you will have to sell. With each decision-maker, begin by establishing their particular problem that your idea will help to solve. Frame your presentation to reinforce the idea that you plan to help them solve an important problem. Make sure you have enough time to explain the solution’s benefits and to answer objections.
Step 8: Taking action

A. Diverge

Now apply the two-step diverging/converging thinking process one more time. Write down whatever you think might prevent you from taking the first step in your action plan. Circle the most important impediment, then list at least three ideas for overcoming it.

<table>
<thead>
<tr>
<th>POTENTIAL IMPEDIMENTS</th>
<th>IDEAS FOR OVERCOMING THE IMPEDIMENTS</th>
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B. Converge

Set this book aside, and go and carry out one of these ideas for overcoming this impediment. Having removed it, now carry out this action step. Repeat this for each action step.
Additional Notes
Now, it’s your turn. Practice from start to finish!
Follow the design thinking process to improve a situation in your own personal life

**Step 1: Problem Finding**

Remember that you start this step by sensing and anticipating “Problems.” Call these problems “fuzzy situations” to emphasize that you shouldn’t prematurely assume anything about them.

**A. Diverge**

Let’s start by setting aside judgment. Use the prompter questions in Figure 11-2 to list fuzzy situations that you might like to address. Practice your process skill of active divergence to come up with more than 10 fuzzy situations.

**B. Converge**

Now practice your process skill of active convergence. Select one problem that truly interests you and that you’d like to resolve soon. Since you’re trying to develop your skill, make sure the problem you select is neither the most difficult you’ve ever raced nor the most trivial. Describe the problem in writing in 15 words or less. Don’t include a lot of detail. And don’t try to solve it right away—remember that your fuzzy situation is merely a starting point.
Step 2: Fact Finding

A. Diverge

Now diverge again. List as many simple, specific, clear answers as you can to each of the following six fact finding questions. Defer judgment: don’t analyze your answers as you go, no matter how trivial or irrelevant they may appear. Try to capture complete thoughts in sentences.

1. What do you know, or think you know, about this fuzzy situation?

2. What do you not know but wish to know about the situation?

3. Why is this a problem, especially for you? Why can’t you make it go away?
4. What solutions have you already tried or thought of trying?

B. Converge

Now converge again. Circle a few of the most intriguing facts on the above list. Look for the things that stand out as particularly meaningful or important, and that perhaps surprise you. There’s no special number to select, perhaps three or four.

5. If this problem were resolved, what would you have that you lack now? What specifically would be different?
Step 3: Problem Definition

A. Initial Divergence

Defining your problem is so important that you actually diverge and converge twice in this step. Keeping your eye on your key facts, and setting aside your judgment, list several optional problem definitions.

Phrase each problem definition as a challenge beginning with, “How might I...?” (How might I find out how many employees have read our policy manual? How might I entice all employees to read our policy manual? How might I encourage all employees to teach each other the policy manual? How might I make our policy manual more interesting to read?) Write down at least seven such challenges.

B. Initial Convergence

Now converge again. From your seven statements, select the one that you feel best represents your challenge at this point. Get ready to diverge a second time.

C. Final Divergence

This time, you’ll diverge using the “why-what’s stopping” analysis. To begin, write down your selected “How might I?” challenge statement. Then ask yourself the question “why?”, that is, “Why do I want to meet this challenge?” For example, if your stated challenge is, “How might I find out how many employees have not read the policy manual?”, then your why question might be, “Why do I want to find out how many employees have not read the policy manual?”. Next, answer your question in a simple, concise but complete sentence. In our example, perhaps an answer is, “I would learn how many employees probably don’t know our policies.” Write down your particular answer above your original challenge statement. (Keep in mind that these particular answers are only examples of countless other suitable possibilities.)

Now transform your answer into a new challenge. For example, the second statement above might be rewritten as “How might I quickly convey the policy manual’s contents to employees who have not read it?”
Write down this new challenge statement above the former one. (Again, this particular challenge is only one example of numerous possibilities.)

Now let’s go the other way. Return to your original “How might I?” challenge statement. As yourself the question, “What’s stopping me?”, that is, “What’s stopping me from meeting this challenge?” In our example, the “what’s stopping” question might be, “What’s stopping me from finding out how many employees have not read the policy manual?” Perhaps the answer is, “I fear that, if I ask each employee outright whether or not they’ve read the manual, they may not tell the truth.” Write down your particular answer below your original challenge statement.

Now, using your imagination, transform this answer into a new challenge, again beginning with the phrase “How might I?” In our example, a new challenge might be, “How might I put employees as ease when I ask them whether or not they’ve read the manual?” Write down this new challenge statement below the former one.

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**Problem definition map**

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<th>Why?</th>
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<td>What’s stopping you?</td>
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You could do much more thorough analysis by asking “Why else would I want to...?”, or “What else is stopping me...?”, several more times in both directions. And for each of the resultant challenges, you could repeat the why-what’s stopping questioning to create even more challenges. The more time you spend on this analysis, or the more frequently you repeat these powerful questions, the better you will understand your problem.

**D. Final Convergence**

Now it’s time to make your final convergence in this step. From all of the challenge statements in your “why-what’s stopping” map, select the one that you feel best describes your problem. (Incidentally, there’s nothing stopping you from selecting more than one challenge—except perhaps lack of time.) With your problem definition in hand, you’re ready to move from the problem *finding* stage of the Simplex process to the problem *solving* stage.
Step 4: Idea finding

A. Diverge

Now it’s time to diverge again. This time, you’re searching for answers rather than for questions. Write down your selected “How might I?” challenge statement.

Lay aside your judgment. Brainstorm at least 10 potential solutions to meet this challenge. Keep your ideas simple and concise. Begin each statement with a verb to emphasize action. Deliberately create radical ideas that you can build upon. Think of ideas that would probably cost you your job, land you in jail, or at least get you into trouble. Prompt further ideas by asking yourself questions like: What new ideas might a friend offer? What ideas might a competitor offer? What ideas might your mother suggest? What would your worst enemy suggest (then reverse it)? What if you were flying a mile high on the back of a large bird and could see yourself below? What solutions might you see from that vantage point that aren’t obvious to you at ground level? What other points of view might you take to generate even more ideas?
**B. Converge**

Now let's converge on your ideas. Circle the four best bets. (There's nothing magical about the number four, of course, but you should attempt to whittle down your list to a manageable number for further evaluation.) Remember to choose ideas that are concrete, that are easy to understand, that point the way to an easy next step, and above all, that aim directly toward solving your chosen challenge.
Step 5: Evaluate and select

A. Diverge

Now it’s time to evaluate your list of potential solutions. Ideally, you want to select one good candidate, or a combination of several. You might even end up with a modified version of one of your original ideas.

To get started, set aside your judgment again. List at least 15 potential criteria that you might use in measuring the worth of these selected solution ideas. Remember that useful criteria must be specific, clear and simple. Extend your effort to think of a wide range of criteria; don’t be too quick to home in. When you think you’ve finished, try to add five more potential criteria to your list.
**B. Converge**

Now it’s time to converge. From your criteria list, circle four that you feel are most important. Make sure you know exactly what your selected criteria mean.

On the grid below, list your selected solution ideas vertically on the left, then list your selected criteria across the top. Using a simple numerical rating scale with 0 for poor, 1 for fair, 2 for good, and 3 for excellent, judge each solution in turn against the first criterion. Remember not to rank the solutions. Instead, rate each one individually. You may find all of your ideas are excellent or all are poor, or any conceivable combination. Then move on to your second criterion and repeat your evaluation procedure, and so on for the remaining criteria.

If you believe that some criteria are more important than others, you can weigh them accordingly to reflect their differing effects. Suppose you believe that the criterion of cost is three times as important as another criterion, say, implementation time. Simply multiply each of the cost ratings by three. (You might not have to weigh the criteria at all. Even if you do, remember that this is not intended to be a rigorous method. Its main intent is to help you carefully think through each of your ideas.)

If you wish, add up the ratings horizontally for each solution idea. These totals are useful guides to your final selection, but you’re not committed to any particular idea at this point. One of your lower scoring solutions may be the right one if you believe in it strongly enough to do what it takes to overcome the hurdles suggested by its low rating. For example, suppose a very good idea rated very low for cost, and very low for ease of gaining acceptance because of its extreme novelty, but was a super idea on all other counts. You might pick it, realizing that it will take a lot of creative persistence.

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and hard work on your part to overcome these barriers. On the other hand, you might find that none of your selections are good enough. If so, return to the beginning of step four to generate new solution ideas. Or you can backtrack even further. Perhaps you missed important facts. On the other hand, you might like two solution ideas equally: perhaps there’s a way to combine them into a single solution.

Now write down your final selection below at the beginning of step 6 as your solution for action. Remember that you must know exactly what you mean by your solution. If there is any ambiguity in the solution, take the time to clarify it. Having reached a solution, you’re ready to move into the next phase of the Simplex process, solution implementation.
Step 6: Planning action

Now let’s continue our diverging/converging process into the implementation phase. Remember that your ultimate goal is to take action, creating a valuable change. You need to exercise just as much creativity in these last three steps as in the first five.

A. Diverge

Begin diverging again. Keeping an eye on your chosen solution, write down at least one answer to each of the following six questions:

1. What new problems might this idea create?

2. Where might you encounter difficulties with this idea?

3. Who might be negatively affected by this idea?

4. Who would benefit from this idea?

5. How might you introduce this idea?

6. When might be the best time to introduce this idea?
Now continue diverging. Imagine yourself alone in a movie theatre, watching ourself on the screen as you successfully implement your solution idea, creating a valuable change. What are you saying, hearing and doing? Who else is in the movie? What are they doing and saying? Where is the movie taking place? When? How do you feel as you watch? It’s important to visualize yourself taking specific actions with specific results. Write down your answers to these questions.

Let’s diverge further. Putting aside your judgment, quickly list at least 10 simple steps that you might take toward putting yourself into the movie scene. Don’t worry about getting the steps in any “correct” order. Include even unusual steps. Write down each thought as it occurs to you. Prompt yourself with questions like, Whom could I call? What could I buy? Where could I go? What would I need?
B. Converge

Now it’s time to converge. From this list of possible actions, circle the one you believe you should do first. Make sure it starts with an action work and is simple, clear and specific. On the action plan below, write this action under the heading “What will be done.” However, make sure you don’t write it as number one, two or three. Write it as perhaps the third or fourth step so you leave space both above and below it on the action plan: you may discover earlier necessary actions as you build your action plan.

Now write your own name under the heading “By Whom” for this first step. Then fill in the blank under the heading “How it will be done.” This makes your action step more specific. For example, if your action step were to call a meeting, you would specify how you would call that meeting: by phone; by checking a list of meeting candidates with your boss; by delegating the task to someone else. Under the heading “When,” write down a specific date and time for taking this action. Then under the heading “Where,” write down the specific place in which you plan to take the action.

You’ll likely think of further action steps that should be carried out either just before or just after your first step. In either case, repeat the procedure above. Perhaps you can nail down only a few action steps right now—subsequent actions might depend on how your first steps turn out. Leave room for exercising creativity as your action plan unfolds. Recall the famous adage: Plan your work and work your plan.

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You now have a simple plan for implementing your chosen solution.
Step 7: Gaining acceptance

A. Diverge

It’s quite likely that your action plan included getting support or approval from at least one other person. Whose approval might you need? Whose support might you need? Write one of the most important names below.

Continue diverging. Might your idea solve any of this person’s problems? Pick one of the most important problems and write it down here.

Diverge again. Write down three benefits that this person would derive if your solution were implemented. Now converge. For each of the three benefits, write down at least one way in which you might illustrate or prove the benefit or in which you might clarify the benefit for this key person.

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Now list at least three objections that you anticipate this key individual might raise to your solution. Remember that new idea cause discomfort for all of us. Converge again. For each objection, write down at least one way in which you might show the person how it can be overcome or minimized.

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<th>OBJECTIONS</th>
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You can tailor similar plans for each individual you will have to sell. With each decision-maker, begin be establishing their particular problem that your idea will help to solve. Frame your presentation to reinforce the idea that you plan to help them solve an important problem. Make sure you have enough time to explain the solution’s benefits and to answer objections.
Step 8: Taking action

A. Diverge

Now apply the two-step diverging/converging thinking process one more time. Write down whatever you think might prevent you from taking the first step in your action plan. Circle the most important impediment, then list at least three ideas for overcoming it.

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<th>POTENTIAL IMPEDIMENTS</th>
<th>IDEAS FOR OVERCOMING THE IMPEDIMENTS</th>
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B. Converge

Set this book aside, and go and carry out one of these ideas for overcoming this impediment. Having removed it, now carry out this action step. Repeat this for each action step.
NOW, do it with your team and add more skills
Follow the design thinking process to improve a situation with your team

Step 1: Problem Finding

Remember that you start this step by sensing and anticipating "Problems." Call these problems "fuzzy situations" to emphasize that you shouldn’t prematurely assume anything about them.

**A. Diverge**

Let’s start by setting aside judgment. Use the prompter questions in Figure 11-2 to list fuzzy situations that you might like the address. Practice your process skill of active divergence to come up with more than 10 fuzzy situations.


**B. Converge**

Now practice your process skill of active convergence. Select one problem that truly interests you and that you’d like to resolve soon. Since you’re trying to develop your skill, make sure the problem you select is neither the most difficult you’ve ever raced nor the most trivial. Describe the problem in writing in 15 words or less. Don’t include a lot of detail. And don’t try to solve it right away—remember that your fuzzy situation is merely a starting point.
Step 2: Fact Finding

A. Diverge

Now diverge again. List as many simple, specific, clear answers as you can to each of the following six fact finding questions. Defer judgment: don’t analyze your answers as you go, no matter how trivial or irrelevant they may appear. Try to capture complete thoughts in sentences.

1. What do you know, or think you know, about this fuzzy situation?

2. What do you not know but wish to know about the situation?

3. Why is this a problem, especially for you? Why can’t you make it go away?
4. **What solutions have you already tried or thought of trying?**

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**5. If this problem were resolved, what would you have that you lack now?**
**What specifically would be different?**

---

**6. What might you be assuming, perhaps unnecessarily?**

---

**B. Converge**

Now converge again. Circle a few of the most intriguing facts on the above list. Look for the things that stand out as particularly meaningful or important, and that perhaps surprise you. There's no special number to select, perhaps three or four.

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Step 3: Problem Definition

A. Initial Divergence

Defining your problem is so important that you actually diverge and converge twice in this step. Keeping your eye on your key facts, and setting aside your judgment, list several optional problem definitions.

Phrase each problem definition as a challenge beginning with, “How might I...?” (How might I find out how many employees have read our policy manual? How might I entice all employees to read our policy manual? How might I encourage all employees to teach each other the policy manual? How might I make our policy manual more interesting to read?) Write down at least seven such challenges.

B. Initial Convergence

Now converge again. From your seven statements, select the one that you feel best represents your challenge at this point. Get ready to diverge a second time.

C. Final Divergence

This time, you’ll diverge using the “why-what’s stopping” analysis. To begin, write down your selected “How might I?” challenge statement. Then ask yourself the question “why?”, that is, “Why do I want to meet this challenge?” For example, if your stated challenge is, “How might I find out how many employees have not read the policy manual?”, then your why question might be, “Why do I want to find out how many employees have not read the policy manual?” Next, answer your question in a simple, concise but complete sentence. In our example, perhaps an answer is, “I would learn how many employees probably don’t know our policies.” Write down your particular answer above your original challenge statement. (Keep in mind that these particular answers are only examples of countless other suitable possibilities.)

Now transform your answer into a new challenge. For example, the second statement above might be rewritten as “How might I quickly convey the policy manual’s contents to employees who have not read it?”
Write down this new challenge statement above the former one. (Again, this particular challenge is only one example of numerous possibilities.)

Now let’s go the other way. Return to your original “How might I?” challenge statement. As yourself the question, “What’s stopping me?”, that is, “What’s stopping me from meeting this challenge?” In our example, the “what’s stopping” question might be, “What’s stopping me from finding out how many employees have not read the policy manual?” Perhaps the answer is, “I fear that, if I ask each employee outright whether or not they’ve read the manual, they may not tell the truth.” “Write down your particular answer below your original challenge statement.

Now, using your imagination, transform this answer into a new challenge, again beginning with the phrase “How might I?” In our example, a new challenge might be, “How might I put employees as ease when I ask them whether or not they’ve read the manual?” Write down this new challenge statement below the former one.

Problem definition map

Add skills described in the Innovators’ Guidebook

QUESTION and REFRAME

READ pages 39–45

TRY methods for

• 3-Part Observation
• Analogous Examples
• “Ways of...” Statements
You could do much more thorough analysis by asking “Why else would I want to...?”, or, “What else is stopping me...?”, several more times in both directions. And for each of the resultant challenges, you could repeat the why-what’s stopping questioning to create even more challenges. The more time you spend on this analysis, or the more frequently you repeat these powerful questions, the better you will understand your problem.

**D. Final Convergence**

Now it’s time to make your final convergence in this step. From all of the challenge statements in your “why-what’s stopping” map, select the one that you feel best describes your problem. (Incidentally, there’s nothing stopping you from selecting more than one challenge—except perhaps lack of time.) With your problem definition in hand, you’re ready to move from the problem finding stage of the Simplex process to the problem solving stage.
Step 4: Idea finding

A. Diverge

Now it’s time to diverge again. This time, you’re searching for answers rather than for questions. Write down your selected “How might I?” challenge statement.

Lay aside your judgment. Brainstorm at least 10 potential solutions to meet this challenge. Keep your ideas simple and concise. Begin each statement with a verb to emphasize action. Deliberately create radical ideas that you can build upon. Think of ideas that would probably cost you your job, land you in jail, or at least get you into trouble. Prompt further ideas by asking yourself questions like: What new ideas might a friend offer? What ideas might a competitor offer? What ideas might your mother suggest? What would your worst enemy suggest (then reverse it)? What if you were flying a mile high on the back of a large bird and could see yourself below? What solutions might you see from that vantage point that aren’t obvious to you at ground level? What other points of view might you take to generate even more ideas?
**B. Converge**

Now let's converge on your ideas. Circle the four best bets. (There's nothing magical about the number four, of course, but you should attempt to whittle down your list to a manageable number for further evaluation.) Remember to choose ideas that are concrete, that are easy to understand, that point the way to an easy next step, and above all, that aim directly toward solving your chosen challenge.

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Step 5: Evaluate and select

A. Diverge

Now it’s time to evaluate your list of potential solutions. Ideally, you want to select one good candidate, or a combination of several. You might even end up with a modified version of one of your original ideas.

To get started, set aside your judgment again. List at least 15 potential criteria that you might use in measuring the worth of these selected solution ideas. Remember that useful criteria must be specific, clear and simple. Extend your effort to think of a wide range of criteria; don’t be too quick to home in. When you think you’ve finished, try to add five more potential criteria to your list.
**B. Converge**

Now it’s time to converge. From your criteria list, circle four that you feel are most important. Make sure you know exactly what your selected criteria mean.

On the grid below, list your selected solution ideas vertically on the left, then list your selected criteria across the top. Using a simple numerical rating scale with 0 for poor, 1 for fair, 2 for good, and 3 for excellent, judge each solution in turn against the first criterion. Remember not to rank the solutions. Instead, rate each one individually. You may find all of your ideas are excellent or all are poor, or any conceivable combination. Then move on to your second criterion and repeat your evaluation procedure, and so on for the remaining criteria.

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and hard work on your part to overcome these barriers. On the other hand, you might find that none of your selections are good enough. If so, return to the beginning of step four to generate new solution ideas. Or you can backtrack even further. Perhaps you missed important facts. On the other hand, you might like two solution ideas equally: perhaps there’s a way to combine them into a single solution.

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Step 6: Planning action

Now let’s continue our diverging/converging process into the implementation phase. Remember that your ultimate goal is to take action, creating a valuable change. You need to exercise just as much creativity in these last three steps as in the first five.

A. Diverge

Begin diverging again. Keeping an eye on your chosen solution, write down at least one answer to each of the following six questions:

1. What new problems might this idea create?

2. Where might you encounter difficulties with this idea?

3. Who might be negatively affected by this idea?

4. Who would benefit from this idea?

5. How might you introduce this idea?

6. When might be the best time to introduce this idea?
Now continue diverging. Imagine yourself alone in a movie theatre, watching yourself on the screen as you successfully implement your solution idea, creating a valuable change. What are you saying, hearing and doing? Who else is in the movie? What are they doing and saying? Where is the movie taking place? When? How do you feel as you watch? It’s important to visualize yourself taking specific actions with specific results. Write down your answers to these questions.

Let’s diverge further. Putting aside your judgment, quickly list at least 10 simple steps that you might take toward putting yourself into the movie scene. Don’t worry about getting the steps in any “correct” order. Include even unusual steps. Write down each thought as it occurs to you. Prompt yourself with questions like, Whom could I call? What could I buy? Where could I go? What would I need?
B. Converge

Now it’s time to converge. From this list of possible actions, circle the one you believe you should do first. Make sure it starts with an action word and is simple, clear and specific. On the action plan below, write this action under the heading “What will be done.” However, make sure you don’t write it as number one, two or three. Write it as perhaps the third or fourth step so you leave space both above and below it on the action plan: you may discover earlier necessary actions as you build your action plan.

Now write your own name under the heading “By Whom” for this first step. Then fill in the blank under the heading “How it will be done.” This makes your action step more specific. For example, if your action step were to call a meeting, you would specify how you would call that meeting: by phone; by checking a list of meeting candidates with your boss; by delegating the task to someone else. Under the heading “When,” write down a specific date and time for taking this action. Then under the heading “Where,” write down the specific place in which you plan to take the action.

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You now have a simple plan for implementing your chosen solution.
Step 7: Gaining acceptance

A. Diverge

It’s quite likely that your action plan included getting support or approval from at least one other person. Whose approval might you need? Whose support might you need? Write one of the most important names below.

Continue diverging. Might your idea solve any of this person’s problems? Pick one of the most important problems and write it down here.

Diverge again. Write down three benefits that this person would derive if your solution were implemented. Now converge. For each of the three benefits, write down at least one way in which you might illustrate or prove the benefit or in which you might clarify the benefit for this key person.

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Now list at least three objections that you anticipate this key individual might raise to your solution. Remember that new idea cause discomfort for all of us. Converge again. For each objection, write down at least one way in which you might show the person how it can be overcome or minimized.

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You can tailor similar plans for each individual you will have to sell. With each decision-maker, begin be establishing their particular problem that your idea will help to solve. Frame your presentation to reinforce the idea that you plan to help them solve an important problem. Make sure you have enough time to explain the solution’s benefits and to answer objections.
Step 8: Taking action

A. Diverge

Now apply the two-step diverging/converging thinking process one more time. Write down whatever you think might prevent you from taking the first step in your action plan. Circle the most important impediment, then list at least three ideas for overcoming it.

<table>
<thead>
<tr>
<th>POTENTIAL IMPEDIMENTS</th>
<th>IDEAS FOR OVERCOMING THE IMPEDIMENTS</th>
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B. Converge

Set this book aside, and go and carry out one of these ideas for overcoming this impediment. Having removed it, now carry out this action step. Repeat this for each action step.