

summer '15 Fellowship

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Designmatters Fellow, Summer 2015

MFA Candidate, 2016

Media Design Practices

Art Center College of Design

The Fellowship

The Design Impact Group (DIG) is the only design practice embedded within a strategic consultancy purely focused on social impact. And I was their summer intern! It was an incredible learning experience, mostly as a result of collaborating with one of the most diverse teams of some of the most driven and humbling-ly bright people I've had the opportunity to work with (MDP excluded of course).

Over 14 weeks I assisted on a range of projects - from visual design support, to conceptual modeling and frameworks, workshops, and a trip to Nairobi. While my role varied greatly from project to project, when projects direction felt uncertain or workload got intense, the studio culture of collaboration and support was one of the most gratifying parts of the whole experience.

Perhaps the most thought-provoking aspect of my fellowship was the exposure to the world of designing for development. The applications of HCD to systems-level issues, and the integration of design studio with strategic consulting, are two pretty fascinating experiments to be a part of. I'm so excited to see how DIG evolves and grows; if it's first year of work is any indication, it seems like this model stands to provide a lot of value for a lot of people.

In sum, it was an incredible summer in which I learned a lot about myself as a designer, and how design - as pervasive as it is today - can still be applied to solve hairy problems in completely new ways.



Project Types + Timeline

Workshops

Facilitating workshops - in a range of scopes and flavors - is a core competency for DIG. During my fellowship, I co-facilitated one HCD session with over 100 participants!

Information Design

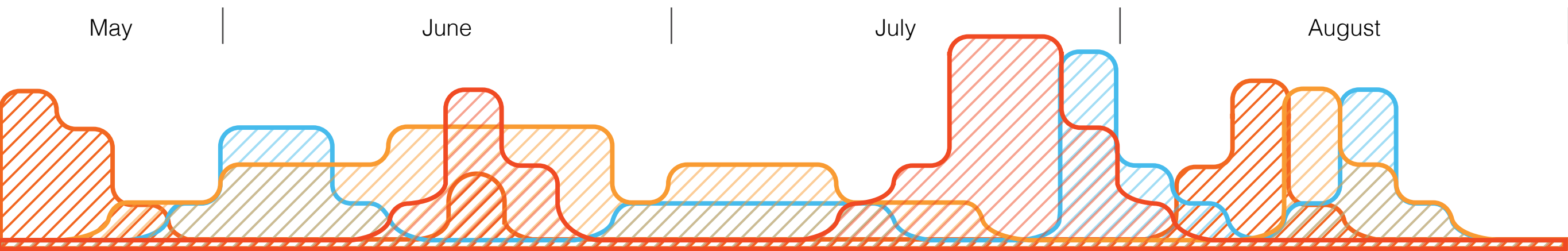
I had the opportunity to put my engineering training to use and create several system maps (customer journey, stakeholder and ecosystem maps) that covered a variety of topics.

CX Toolkit

The longest-term project I helped on was the Customer Experience (CX) Toolkit, which extends through September. I had the chance to help with concept and research phases.

DIG Studio

By mid-summer, the studio celebrated its first Anniversary! I helped design a microsite commemorating its success, and later captured and synthesize learnings from the first team retreat.



Workshops


- i. planning + process
- ii. participants



pre-GES Summit, Nairobi

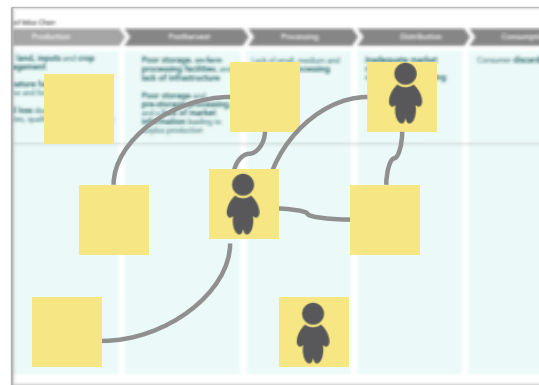
JOHN WAMUSEE
*Small-Holder
 Mango Farmer*

AGE 57
OCCUPATION Mango Farmer
FAMILY Married, Father of 6
LOCATION Machakos, Kenya




PART 1

Understanding the Context



PART 2

Generating Ideas



PART 3

Concept Pitch

In July, I had the opportunity to go to Nairobi! DIG senior designer, Tosh Juma, and I co-facilitated a workshop on the topic “Entrepreneurial Solutions to Post-Harvest Loss” at the pre-Global Entrepreneurship Summit. Our lead-up time was very short, and much of the context for our activities- including the nature of participants - was not set until very late, which made planning the agenda and tone for the workshop a special challenge.

Dalberg and the project partners provided a solid framing for the topical content (the agricultural value chain for maize and mangos), so we developed personas of stakeholders from different points in the value chain as a starting point to ground the workshop. We then crafted a series of design activities and prompts for participants, including stakeholder mapping and concept sketching.



DIG senior designer, Tosh Juma, making a plug for our workshop (which had to compete for time and space with the event's sponsored programming) at the main pre-Summit presentation!



Participants came from a variety of backgrounds and represented organizations such as: Geological Society Of Kenya, University Of Nairobi, Vacid Africa, Alliance Schools, Villgro Kenya, Ascetic Coffee Roasters, Dedan Kimathi University Of Technology, Growth Partners, Gs1, Studio 22 Agencies, Frog, Patnet Steel Makers & Maflora Agencis

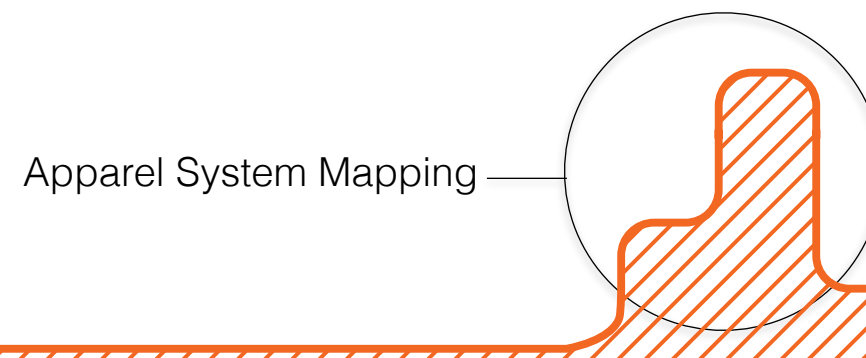
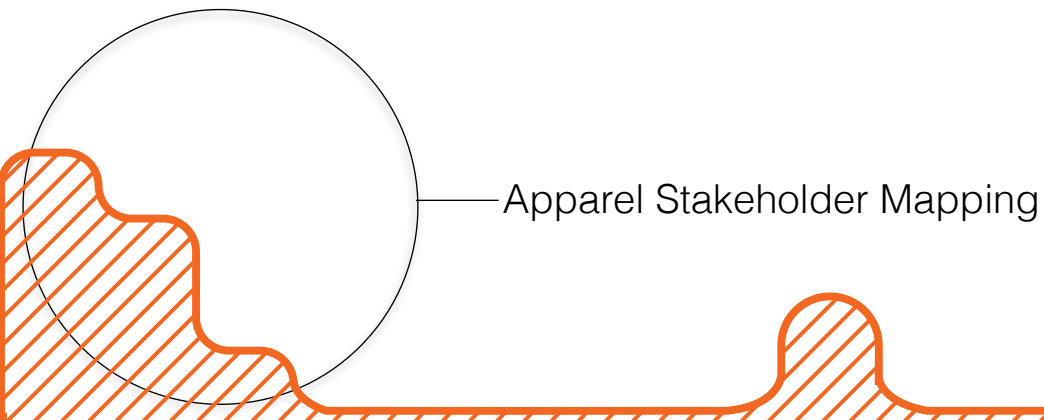
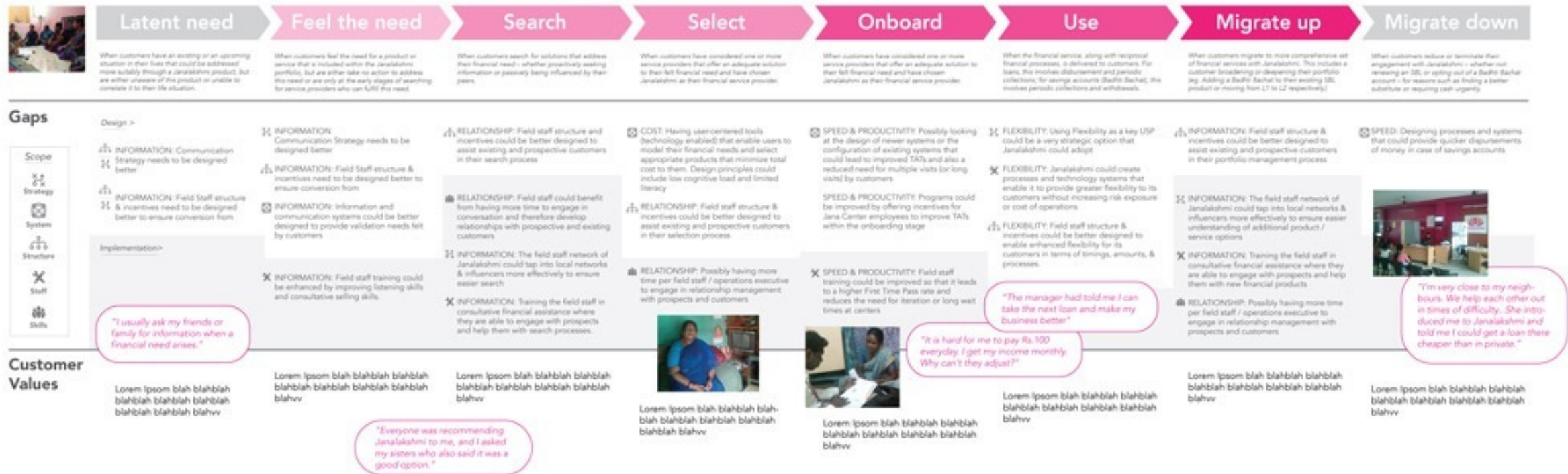
The workshop was open call for any participants who attended the pre-Summit. Despite limited ability to advertise our programming within the larger pre-summit agenda - (which included two parallel break-out sessions) - we had over 100 participants! Participants included students from several local schools and universities, farmers, businesspeople, and many others.

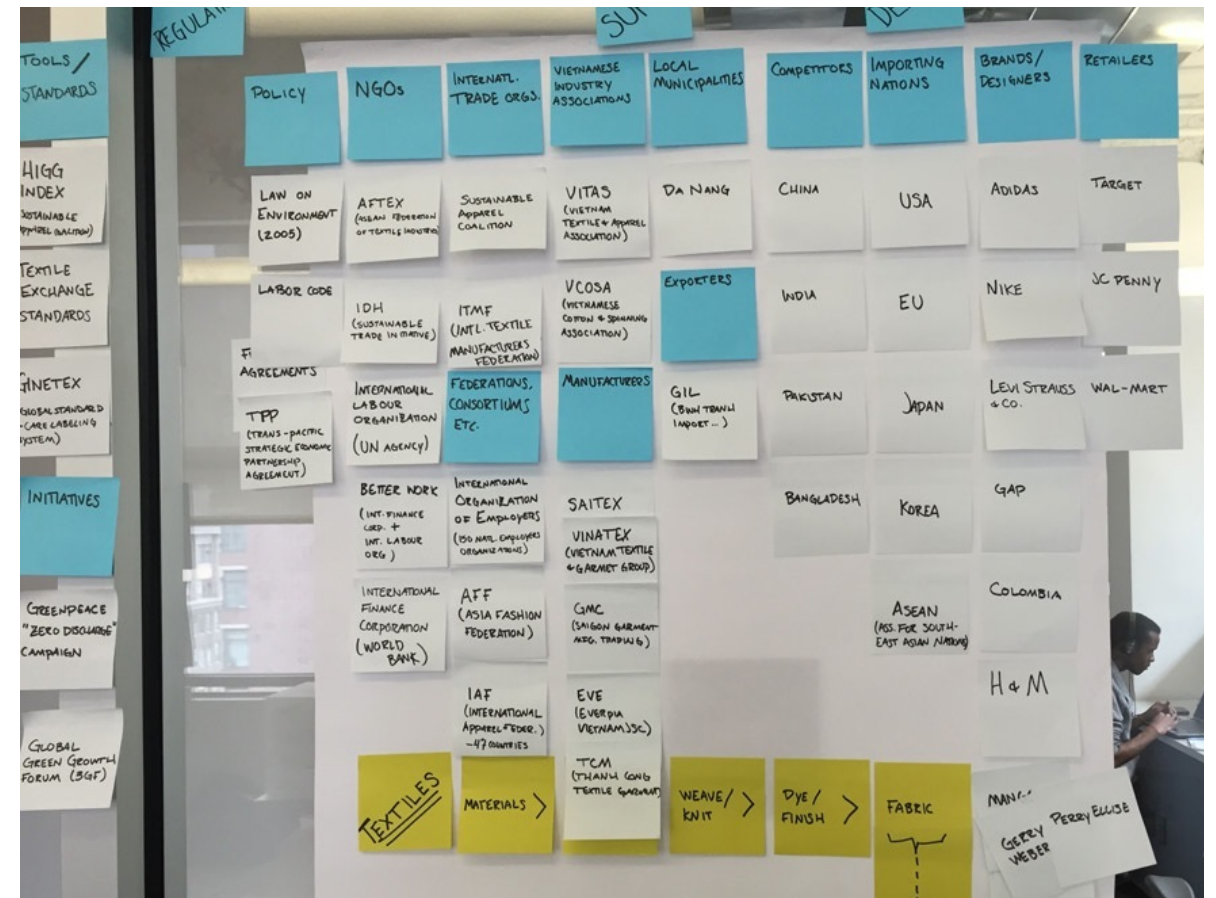
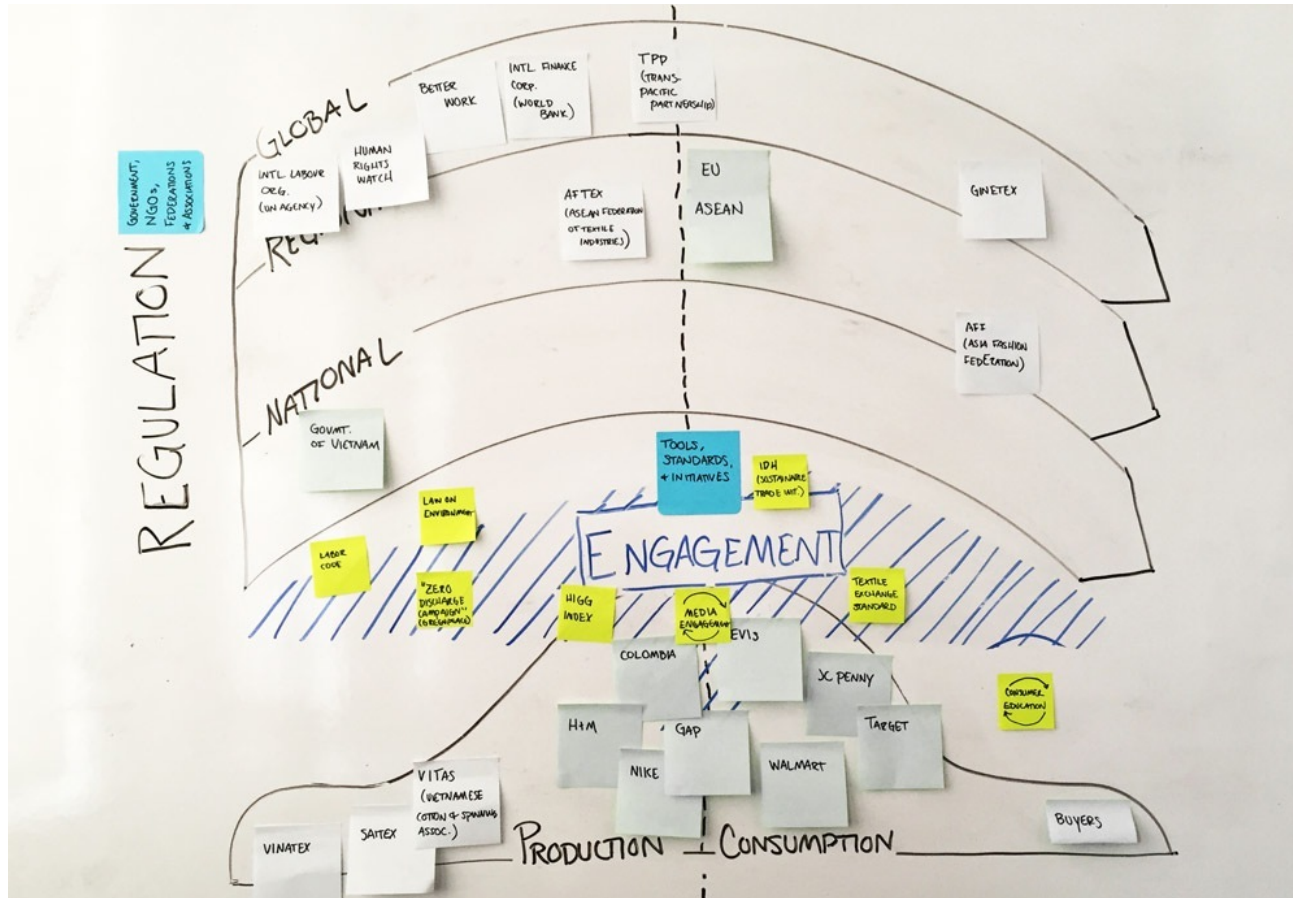


At the conclusion of the breakout session, participant groups had come up with 60+ ideas and 10+ final interventions that addressed issues related with post-harvest loss. Final concepts fell into four theme areas: - 1) Information Access 2) Producer Cooperatives & Community Groups 3) Transportation Interventions 3) Leadership & Policy Initiatives. A synthesis of these ideas and concepts was the final deliverable to the client.

Information Design

- i. planning + research
- ii. layout + design

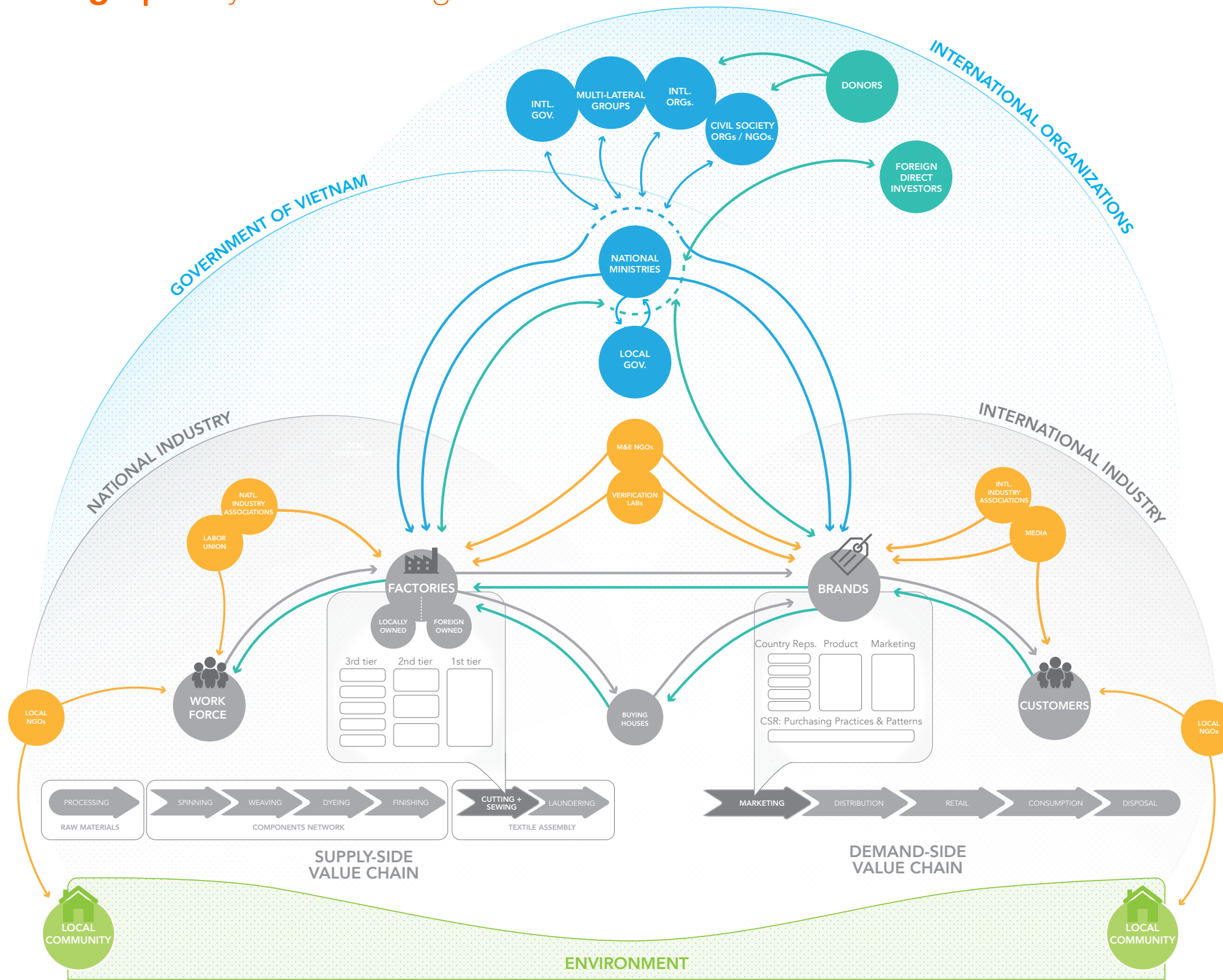




The initial stakeholder map framework I developed was a starting point for the first collaborative workshop of the project coalition. It was used as a rough framework to facilitate an interactive discussion of stakeholders and their roles and relationships in the apparel and footwear production ecosystem.

One of the first projects I helped with at DIG was doing some light research and design to facilitate a coalition of stakeholders in the apparel and footwear production ecosystem in Vietnam, with the goal of moving the industry towards more sustainable practices.

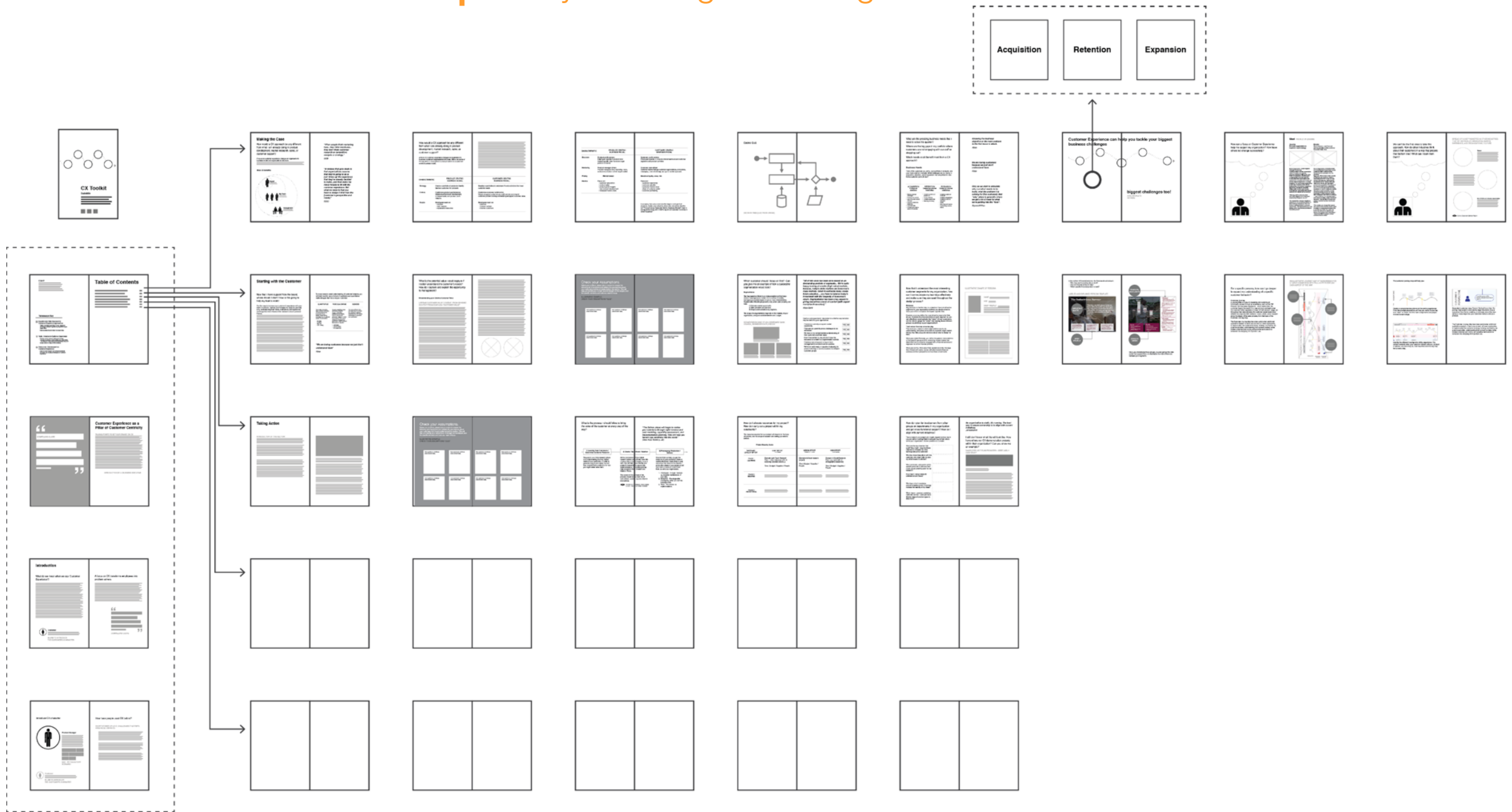
At the beginning of the project, I helped research and categorize stakeholders within the value chain. From that typology, we come up with an initial stakeholder map - to help visualize the approximate relationship these stakeholders have to each other within the ecosystem.



Two rounds of workshops with the clients resulted in a series of maps that captured different aspects of the overall footwear and apparel ecosystem. I helped synthesis four of these maps into a master version.

CX Toolkit

- i. conceptual framework
- ii. content
- iii. layout design + testing



CX Toolkit



The longest-term project I supported throughout the summer was called the Customer Experience Toolkit. Designing the toolkit turned out to be a complex assignment.

MAKING THE CASE

WHAT ARE MY PRESSING BUSINESS NEEDS RIGHT NOW?

- Where is my portfolio underperforming
- Where are the big gaps where customers are not engaging with our stuff or dropping out?
- Which needs could benefit most from a CX approach?

CLASSIFYING BUSINESS NEEDS		
Acquisition	Retention	Expansion
<ul style="list-style-type: none"> Identifying new customer segments to target Identifying new products to sell to existing customers Identifying new channels to reach customers Identifying new ways to deliver products 	<ul style="list-style-type: none"> Identifying ways to improve customer experience Identifying ways to reduce customer churn Identifying ways to improve customer loyalty Identifying ways to improve customer retention 	<ul style="list-style-type: none"> Identifying ways to increase customer lifetime value Identifying ways to increase customer engagement Identifying ways to increase customer loyalty Identifying ways to increase customer retention

HOW WOULD A CX APPROACH BE DIFFERENT FROM WHAT I AM ALREADY DOING?

- What is CX?
- How is CX different from what I am already doing in product development, market research, sales, or customer support?

Product Centric	Customer Centric
<ul style="list-style-type: none"> Product development is the primary focus Product development is the primary focus Product development is the primary focus Product development is the primary focus 	<ul style="list-style-type: none"> Customer experience is the primary focus Customer experience is the primary focus Customer experience is the primary focus Customer experience is the primary focus

Product journey vs customer journey

WHAT DOES SUCCESS LOOK LIKE?

- What could I hope to get out of trying this out?
- How will this help my career? Where is the evidence
- How have other FSP's with similar challenges benefited?
- How do other industries think about their customers in a way that propels their bottom line? What can I learn from them?
- How can I explain the benefits to the folks in compliance or IT so that they won't freak out?

STARTING WITH THE CUSTOMER

WHY START WITH THE CUSTOMER - WHAT DO THEY KNOW?

- Which customers should I focus on?
- What could I learn from my customers? Where are the biggest gaps in our knowledge / data about customers?

CUSTOMER KNOWLEDGE AREAS / DATA REQUIRED		
Acquisition	Retention	Retention
<ul style="list-style-type: none"> Identifying new customer segments to target Identifying new products to sell to existing customers Identifying new channels to reach customers Identifying new ways to deliver products 	<ul style="list-style-type: none"> Identifying ways to improve customer experience Identifying ways to reduce customer churn Identifying ways to improve customer loyalty Identifying ways to improve customer retention 	<ul style="list-style-type: none"> Identifying ways to increase customer lifetime value Identifying ways to increase customer engagement Identifying ways to increase customer loyalty Identifying ways to increase customer retention

CUSTOMERS ALWAYS HAVE A LOT OF NEEDS. HOW DO I FIGURE OUT THE ONES THAT MATTER?

- Which customer needs / gaps should I focus on?
- How do I identify an opportunity that will make me money as well?

Expanded explanation of customer journey

WHAT IS THE RIGHT STARTING POINT?

- What is the right starting point?
- What is the potential value I could capture if I understood the customer's perspective / needs better?
- How do I capture and sell the opportunity to mgmt?
- What quant / qual data do I need to support my case?
- How do I get approval from:
 - Product House?
 - CFO?
 - Compliance?

CREATING A PLAN

SOUNDS LIKE IT COULD BE HARD. WHAT TYPE OF PROJECT IS RIGHT FOR ME?

- How can I scope the effort to deliver quick wins while building longer term progress? I will have to show some results quickly or else I won't be able to generate a buy-in for the approach.
- Scoping your starting point: Quick Os → Timeline // Level of knowledge // Questions to answer // Goals
- Definition of project types: prototypes, pilots/mini pilots, implementation
- Project grid with examples: DARE // 7-30-90+ days

SAMPLE PROJECT GRID			
	Short Term (1 Week)	Medium Term (1 Month)	Long Term (3 Months+)
Acquisition	Sample Project	Sample Project	Sample Project
Retention	Sample Project	Sample Project	Sample Project
Retention	Sample Project	Sample Project	Sample Project

WHAT RESOURCES DO I NEED TO MAKE THIS HAPPEN?

- Cross-functional overlaps
- Outlining resources
 - Budget/Supplies
 - Time
 - People (internal and external)
- Data to collect / Metrics to tell story

CAN YOU SHOW ME AN EXAMPLE?

- How have others run CX demonstration projects within their organization?
- What tools and templates can you give me to put this into action for me and my team?

MAKING IT WORK

WHAT SORT OF TEAM DO I NEED TO BE SUCCESSFUL?

- Who do we need to ensure success at each step of the way?
- What if I don't have the right capabilities in my organization?
- What is the team structure, roles and responsibilities?
- What cross-functional capabilities do we need?
- What incentives models should we put in place?

HOW WILL I KNOW IF IT IS WORKING?

- What does the process look / feel like? How do I fit this within our normal organizational process / approach so that people don't freak out?
- Background on a "Lean" Design Process
 - Principles
 - Oversights
 - Independence
 - Iteration and adaption

WHICH TOOLS / METHODS SHOULD I USE?

- How do I make sense of all of the design / experience tools out there?
- What mix of qualitative and quantitative methods will get me the best result?
- What type of data do I need to gather along the way?
- How much data is enough? Too much?
- How do I know when I'm done?
- How do we know when a product/service concept just isn't working?

INDEX OF TOOLS AND METHODS		
	IDEATION	ACTION
Storyboard your idea	Storyboarding	Storyboarding
Bring Your Idea to Life	Prototyping	Prototyping
Job and role descriptions	Job and role descriptions	Job and role descriptions
Tool for capturing results	Tool for capturing results	Tool for capturing results
Case study template	Case study template	Case study template
ROI model	ROI model	ROI model

SHOWCASING THE RESULTS

HOW DO WE MEASURE RESULTS: SUCCESS VS. FAILURE?

- I want to know how it's going. How do I gather the feedback I need?
- What are the best ways to balance quantitative and qualitative approaches?

WHAT ARE THE BEST WAYS TO SHARE MY STORY ACROSS THE ORGANIZATION?

- I've learned a lot through these projects. How do I capture and distill these insights?
- What are the best ways to share the story within my organization, to both my peers and influencers?
- How can I ensure we evolve and make changes that align customer experience with our business?
- How do I link this back to who I am trying to influence?

Start a Conversation about CX Everyday
Show video on power of CX. Share powerful external CX moments in your next management meeting.

Take the Pulse
Send an email to staff and ask them specific questions about the interactions they've had with customers in the past that might overlap with your research.

Change of Scenery
Choose a branch to work from remotely and set up coffee to meet frontline staff.

Coffee with Customers
Identify 3 curiosities you have about your customers, by organizing coffee breaks with them, either individually or in groups.

Shadowing
Follow an agent or customer and document how he / she interacts in the branch.

Fly on the Wall
Identify a location where you can gather insights about new existing customer spending AFT.

Customer Sketch
Create 3 basic profiles of your customers and use them as a research guide to learn about the places, times and channels to reach them.

Check Your Assumptions
Define 3 specific behaviors from your customers about the way they use your product, and run 3 interviews to understand their behavior.

Storyboard your idea
Imagine the scenario in which your idea will play out with your customers and gather feedback with a few customer.

Bring Your Idea to Life
Practice making a rough prototype or mock-up of your idea. Try something low-fidelity and quick to represent your concept, and share with your team.

TOOL 01
Template to build investment case for the organization (PPT)

RESOURCE 01
Making the case for CX (booklet)

TOOL 02
Segmentation Tool

RESOURCE 02
Case Study Library

TOOL 03
Extended customer journey map shows CX beyond the product

RESOURCE 03
Reference library of sample project briefs and project plans, sample timelines and schedules

TOOL 04
One page opportunity brief (word doc)

RESOURCE 04
Guide: how to speak to each function about CX

TOOL 05
Project plan - helpful questions to answer (approach, budget, metrics, etc.) and timeline template (word doc)

RESOURCE 05
Index of CX tools and methods, prototypes etc...

TOOL 06
Budgeting Tools (excel file)

RESOURCE 06
Prototype Gallery

TOOL 07
Business Model Canvas

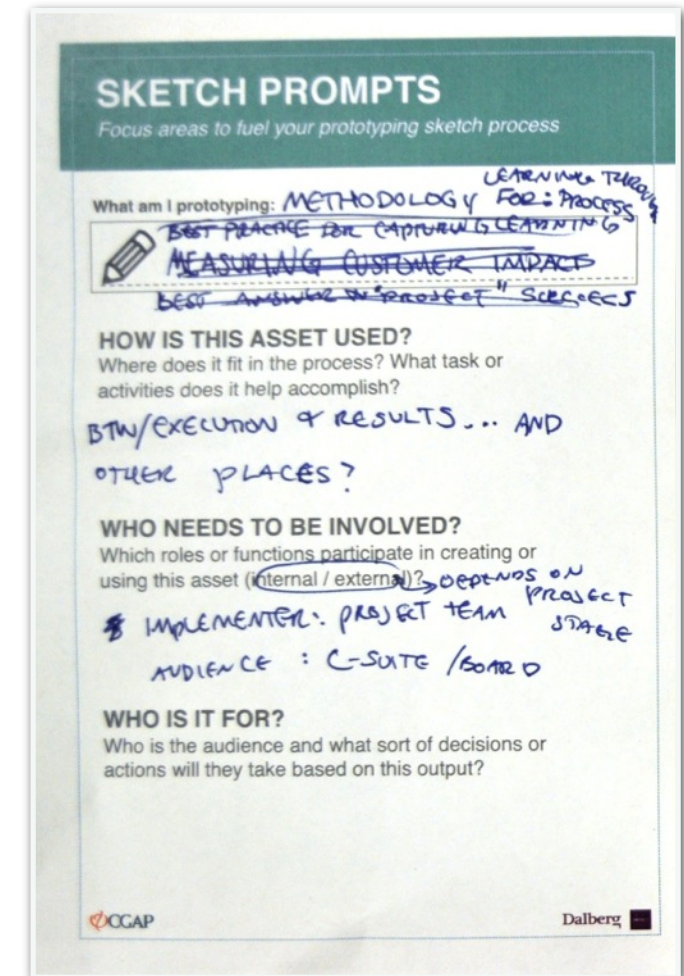
TOOL 08
Job and role descriptions for your project collaborators (word doc)

TOOL 09
Tool for capturing results KPIs, Indicators, Insights

TOOL 10
Case study template for the capture and sharing of ROI (pdf)

TOOL 11
ROI model (spreadsheet)

As we established the conceptual framework for the kit, we wrestled with some very challenging questions, like who the user would be (a middle-manager type?), what the role of the toolkit actually is (a guide to execute a small-scale project? A strategic-level conversation starter?), and what unique voice we, as designers, could provide (Human-Centered Design as a lens for solving business problems?).

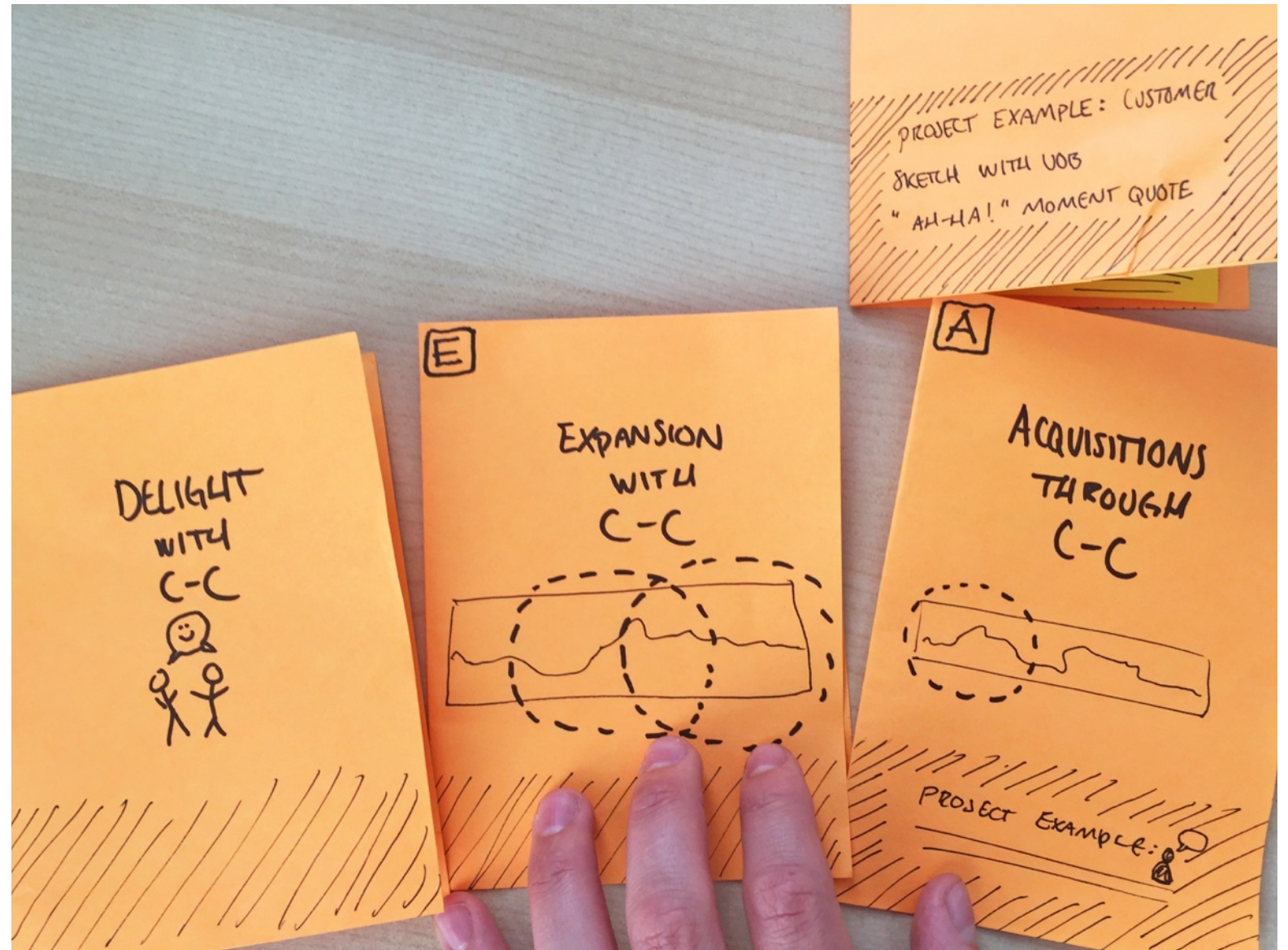
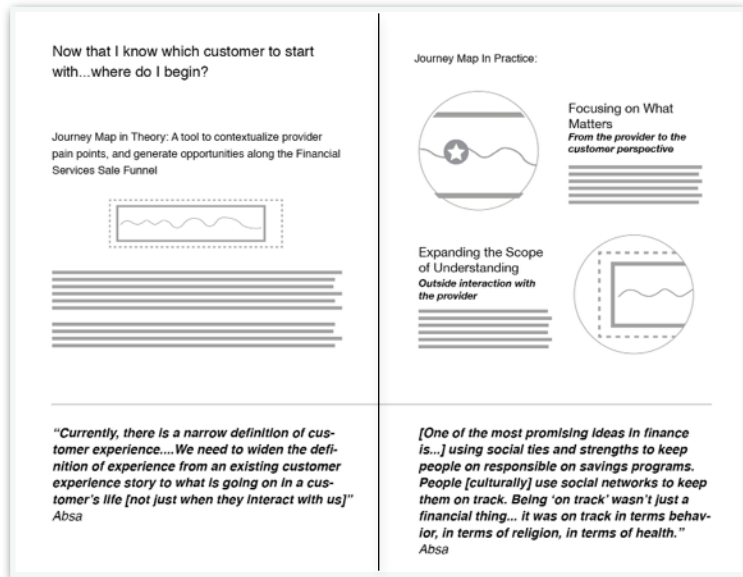


Content for the toolkit came from three main sources: research on existing case studies, expert interviews, and lots of productive working sessions with the client. In one workshop, we prototyped several new concepts - such as a data capture layer to be used throughout the kit, and a prototyping gallery - that could potentially be incorporated into the toolkit.

Research required us to develop a large catalog of existing tools and case studies, from CGAP, Nesta, Ideo.org, and many other places. In parallel, we conducted a series of interviews with both FSP administrators, and experts in analogous industries, to gain additional insights into the materials we were working with.

Over the course of the summer, we also led workshops with our clients - in NYC and DC! The client conducts a lot of research related to financial services for development, so it was important for us to work closely with and learn from their existing body of work.

Currently, the toolkit team (led by a badass visual designer) is prototyping layout and design. The final product will be a combination of digital and physical formats. Beta testing for the physical version of the toolkit will begin with partner FSPs in September!



DESIGN
IMPACT
GROUP



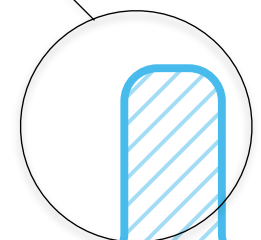
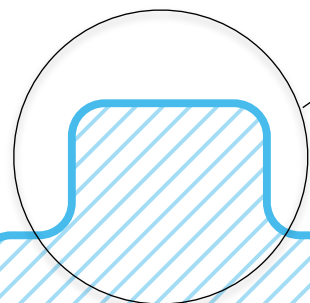
DIG Studio

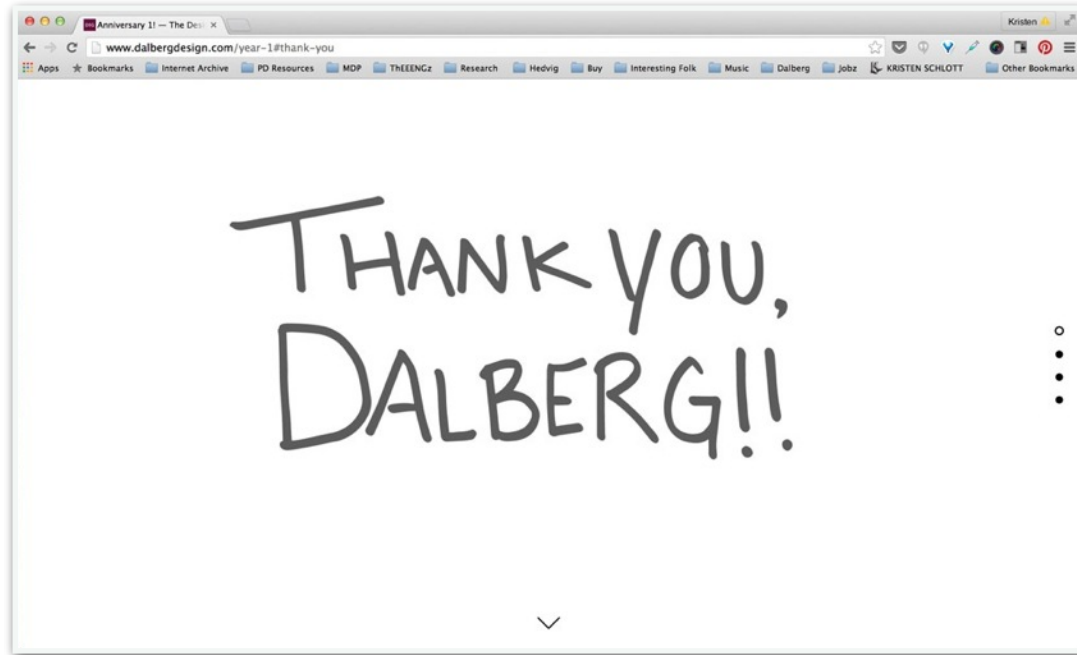
- i. 1st anniversary microsite
- ii. team summit report



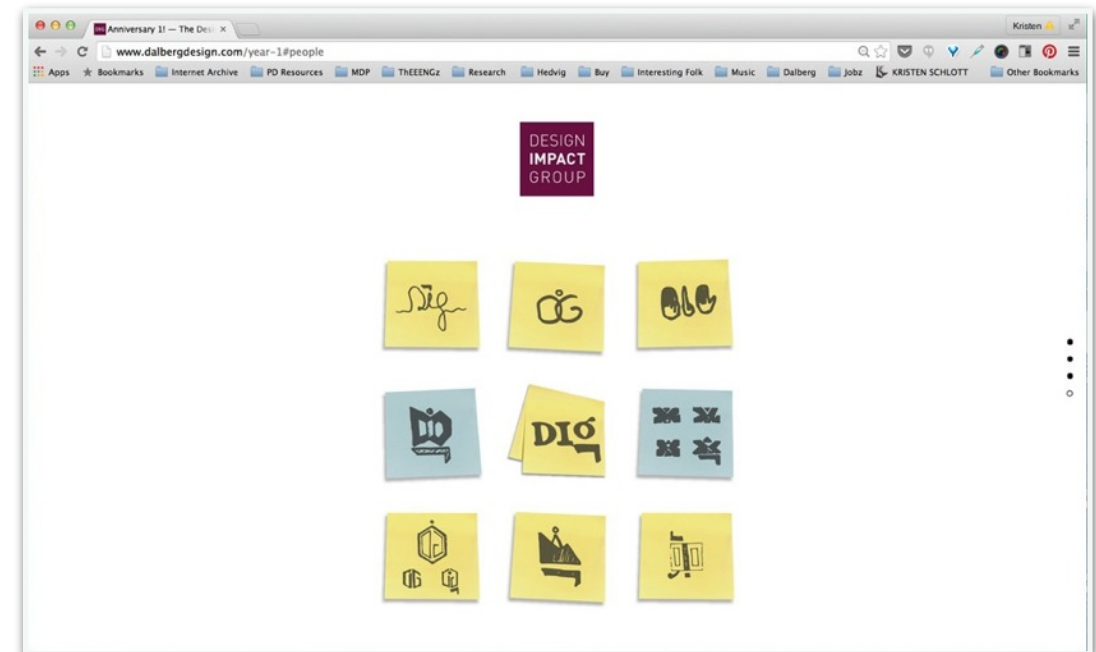
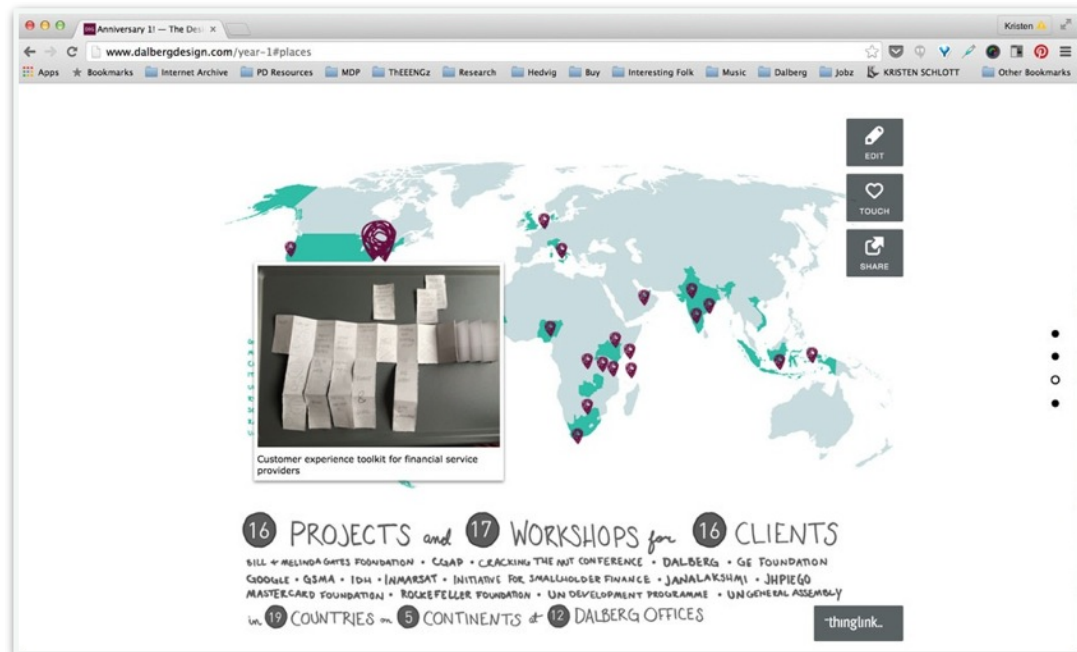
Team Summit Learnings Report

Anniversary Microsite Design





By mid-summer, DIG was celebrating its First Anniversary! I helped design a microsite to celebrate. The site was hosted on Squarespace and so, with some custom CSS, it was fairly simple to build out our grand vision. In addition I found a handy web tool called Thingly - that supports layered media embedding - and became a convenient solution for custom project "mapping." The majority of the project workload was actually content collection - tracking down photos, and creating an index of past projects.





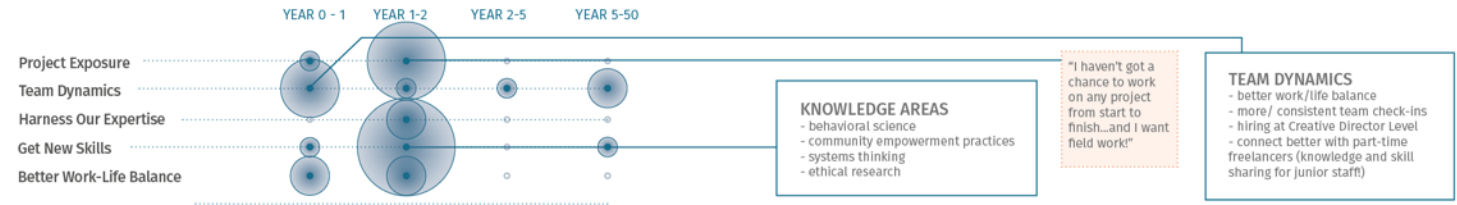
THEMES HEATMAP

Over 100 ideas, goals, and observations, organized by theme and visualized by frequency of mention.

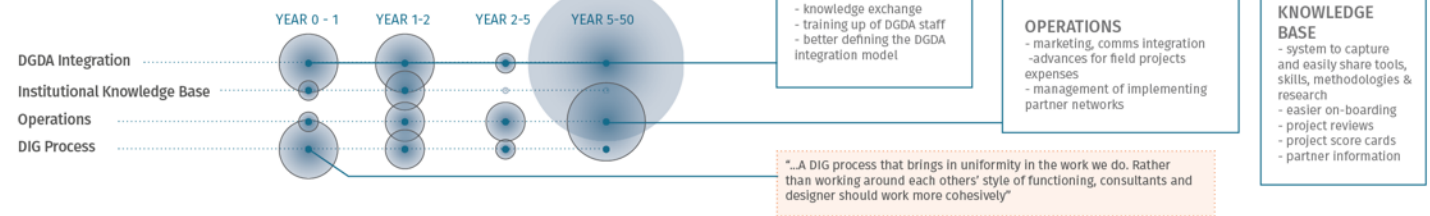
GOAL HIGHLIGHTS

Over 100 ideas, goals, and observations, organized by theme and visualized by frequency of mention.

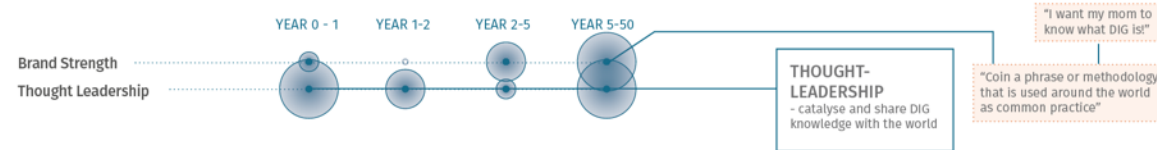
1. TEAM GROWTH & SUPPORT



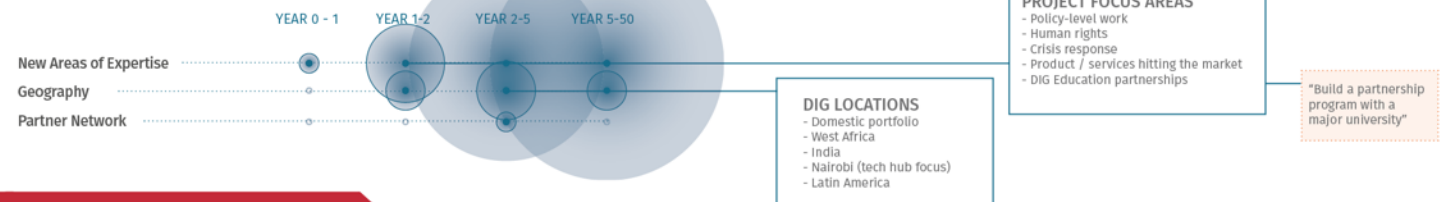
2. OPERATIONS & PROCESS



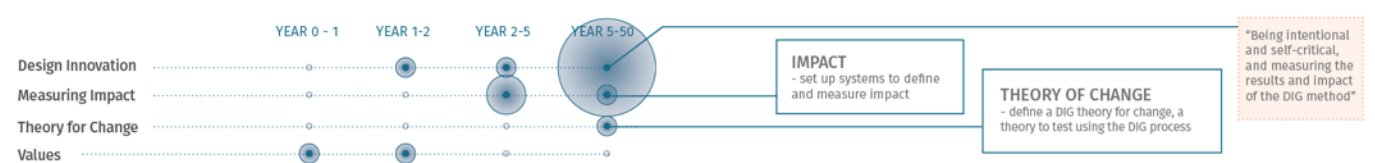
3. BRAND + EXTERNAL VOICE



4. CAPACITY + COMPETENCY



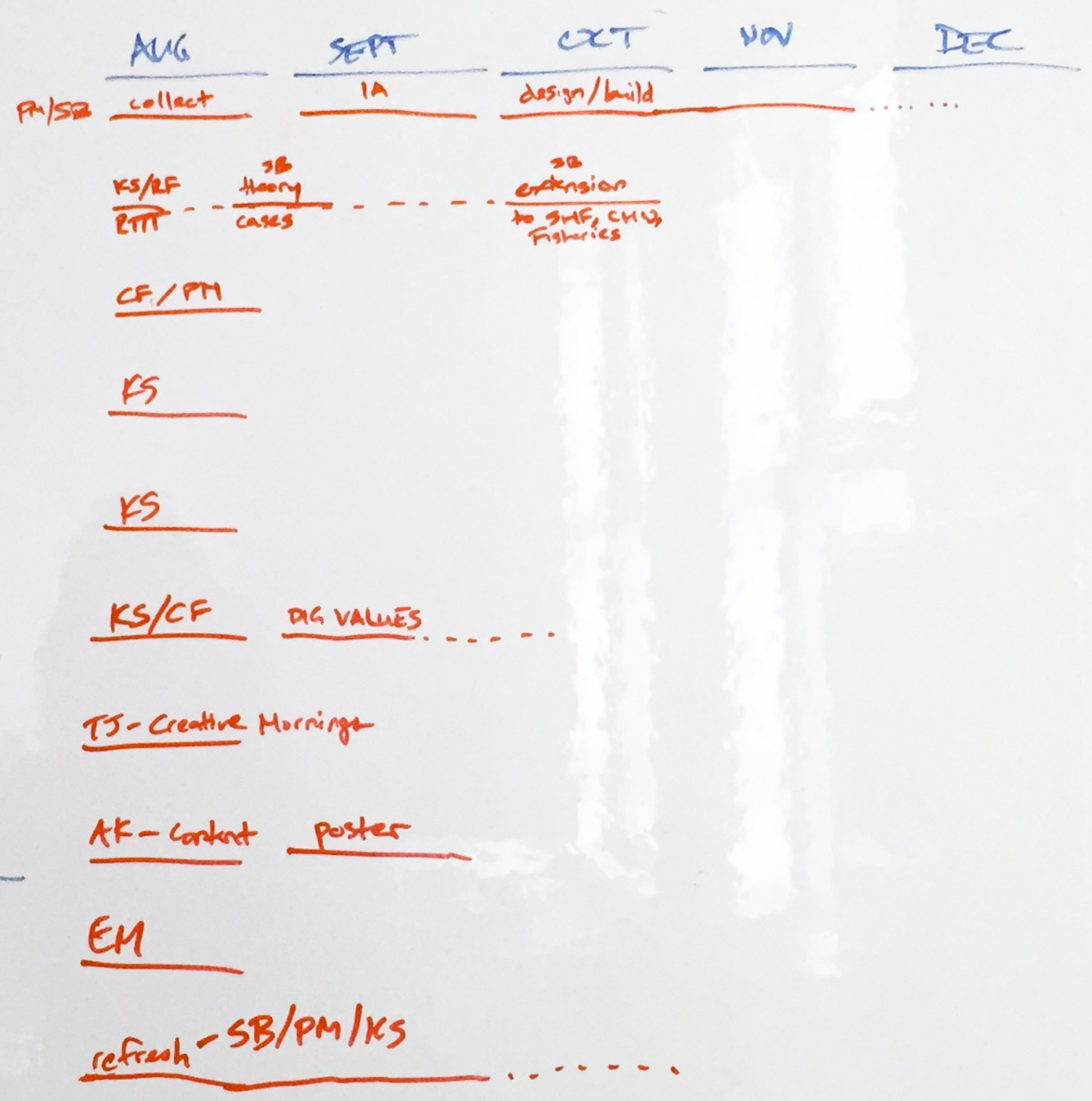
5. VISION, THEORY FOR CHANGE



As a continuation of 1st Year Anniversary activities, the DIG team held its first annual Team Summit in NYC, the last week in August. The Summit took place over two days, and was largely led by the studio principles, Robert and Ravi. DIG studio members from London and Nairobi flew in to join in the workshopping activities.

Post-Summit, I helped to catalog and synthesize dozens of insights and ideas, which ultimately manifest as a fun infographic.

- DESIGN IMPACT. GUIDE
- SYSTEMS MAPPING / THINKING
- TEMPLATES
- FIELD KIT
- WORKSHOP KIT
- DIG SUMMIT SYNTHESIS
- DIG NAIROBI MARKETING
- DGDA ENGAGEMENT MODEL
- TEAM COMMS PLAN
- DIG WEBSITE
 - team - instapan
 - events
 - social media
 - cases



One final output of the team summit in NYC was a flurry of self-initiated internal projects, project board seen here. The projects respond to a variety of wants / needs that were revealed during the retreat activities, and will act as a good gauge for internal growth for next year!

Thank you!



Jennifer May
Stephanie Sigg
Robert Fabricant
Montana Cherney

Pragya Mishra
Sebastian Barrera
Melanie Kahl
Charlotte Furet
Tosh Juma