## PROBLEM / PEOPLE / PROCESS

Project Name:

Date:

Version:

# BACKGROUND.



Why does this project exist/start? Why is it important? Which company goal, OKR or strategy does this support? What happens if we don't do it?

## CONSTRAINTS.



What are the set current barriers? Which restrictions affect the project (resources, money, time, quality, procedures, standards, technology, knowledge)?

## THE CHALLENGE.



Capture the initial problem statement you're solving for. Rewrite the challenge several times with wider and narrower frames. Ask 'why' to widen and 'how' to narrow the frame.





How did we or others try to solve it in the past? What are our competitors doing about it? What works and what didn't? What current trends impact us?

# OUTCOME.



How do we know your project is a success? (KPIs) Be concrete about what deliverables you need by the end. Make it a SMART-goal.

# RISKS.



What potential threats/events/conditions can affect the project? What can be done to reduce or enhance the probability? (Risk-Matrix: Impact × Probability)





Which areas should and should not be covered with this project? What is part of the project and what is outside of the boundaries? What should not change?

#### ONE-LINER PITCH.



For [user] who [need/problem], [our project] will [primary benefit] because [insight/evidence]. Unlike [current alternatives], we will [unique approach].

# RESOURCES.



TIMEFRAME & MILESTONES.



What are starting and end dates? What is the total time estimated for all project actions? What are the 4-6 milestones? When do the milestones occur? How is the achievement of a milestone measured?







What resources are needed/lacking in the project? Where will they be found? What is the total cost estimate (manpower, equipment, facilities, materials)?

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## TEAM ROSTER.



List each team member's name, role, and the superpowers they bring to the team. Plan for a balance of expertise, inspiration and decision making by representing different personas on your core team (RACI-Matrix). Look for:

☐ The Hustlers ☐ The Hackers

☐ The Hipsters ☐ The Hecklers

## TEAM RULES.



What are rules we need to function as team? How do we communicate and make decisions? How do we execute and evaluate what we do?

# TEAM VALUES.



What principles does our team live by? What do we stand for? What are our values that we want to be at the core of our project?

#### PROJECT STAKEHOLDERS.

# AUDIENCE.



Who will benefit from the outcome of the project? What assumption exist for each user group (Persona)?

# INDIVIDUAL NEEDS.



What does each one of us need to be successful? What are individual personal goals? Are there personal agendas that we want to open up?

# FUEL SOURCES.



What energizes the team? Where do we draw inspiration from?

#### SECRET TEAM NAME.



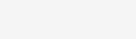






Who else is interested or affected by the project? What is their role in the project? How are they engaged and involved in project communication (RACI-Matrix)?

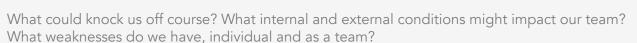
## TEAM STRENGTHS.



What are hard and soft skills we have in the team that help us achieve our goal? What strengths do we have, individually and as a team?



# TEAM WEAKNESSES.





EXECUTIVE SPONSOR.

Who is accountable for the success of the project? Who is the first executive person to talk to?

Project Name:	Date:	

Dig into the problem. Look at the history, context, objects, and people involved.  * OPEN >>
<ul> <li>□ Create a Design Brief</li> <li>□ Identify Constraints</li> <li>□ Stakeholder Inventory</li> <li>□ Competitive Analysis</li> <li>□ Interview Friends/Family</li> <li>□ Write a Discussion Guide</li> <li>□ Do Practice Interviews</li> <li>□ Create Research Screener</li> <li>□ Recruit Research Participants</li> </ul>
* EXPLORE >>  □ Secondary Research □ Inspiration Field Trip(s) □ Surveys □ Individual Interviews □ Personal Inventory □ Day In The Life (Shadows) □ User Journaling □ Competitive Analysis □ Expert Interviews □ Group Discussions □ Field Intercepts □ Secondary Research
* CLOSE >> □ Capture Observations □ Share What You Learned □ Set Up a Project Room

## UNDERSTAND.

Go deeper and find patterns. Reframe

☐ Capture Stories Onto Post-its

☐ Prepare Quantitative Data to

☐ Use Frameworks to Explore

☐ Affinity Mapping (Clustering)

☐ 5 E's Experience Framework

☐ Opportunity Framing Matrix

☐ Develop Insight Statements

☐ Identify Opportunity Spaces

☐ Create Design Principles

☐ Explore Metaphors & Analogise

Relationships/Tensions in Data:

your challenge based on needs.

\* OPEN >>

be Sorted

\* EXPLORE >>

☐ 2x2 Matrix

☐ Hierarchies

☐ Empathy Mapping

☐ What / How / Why

☐ Tension / Conflict Map

☐ Persona Development

☐ Propose Hypotheses

**ESTIMATED TIME** 

TO UNDERSTAND:

☐ Journey Map

☐ Value Map

☐ A-E-I-O-U

\* CLOSE >>

☐ 5 Whys







Have lots of ideas, good and bad. Don't stop at the obvious or the impossible.

#### \* OPEN >>

- ☐ Create Insight Driven Creative Prompts (Questions)
- ☐ Create Lateral Inspiration **Creative Prompts**
- ☐ Create Disruptive Creative Prompts and Activities
- ☐ Create Creative-Constraints

#### \* EXPLORE >>

- ☐ 'Think, Pair, Share' Sketching and Share Outs
- ☐ Conduct Solo Ideation
- ☐ Conduct Group Ideation:
  - ☐ Brainstorming
  - ☐ Role-Storming
  - ☐ Reverse-Storming ☐ Six Thinking Hats
  - ☐ SCAMPER

#### \* CLOSE >>>

- ☐ Cluster Ideas
- ☐ Constellate Ideas
- ☐ Abstract Design Principles
- ☐ Create Criteria
- ☐ Sticker Voting
- ☐ Pitching
- ☐ Invite a Decision Maker to Select Top Ideas

**ESTIMATED TIME** TO IDEATE:

## EXPERIMENT.



Try some things out. Make some things. Learn quickly. Get feedback. Improve.

#### \* OPEN >>

- ☐ Identify Assumptions to Test
- ☐ Choose Prototype and Fidelity
- ☐ Create User Feedback Discussion Guide

#### \* EXPLORE >>

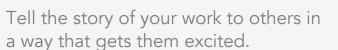
- ☐ Role Prototypes:
  - ☐ Storyboard
  - ☐ Persona
  - ☐ Journey Map
  - ☐ Role Play
- ☐ Video
- ☐ Look + Feel Prototypes:
  - ☐ Mood Board
  - ☐ Wireframes
  - ☐ Interactive Demo
  - ☐ Physical Model
- ☐ Implementation Prototype:
  - ☐ Business Model Canvas
  - ☐ Value Proposition
  - ☐ Cost/Revenue Study
  - ☐ Partnerships
  - ☐ Distribution Channels
  - ☐ Production Methods

#### \* CLOSE >>

☐ User Feedback Sessions

**ESTIMATED TIME** TO EXPERIMENT:

# DISTILL.



Version:

#### \* OPEN >>

- ☐ Reflect Debrief Internally on Lessons Learned Throughout
- ☐ Extract Top Outcomes of Each Phase
- ☐ Identify Your Solution Strengths and Open Questions
- ☐ Synthesize Metrics and KPIs
- ☐ Create an Executive Summary

#### \* EXPLORE >>>

- ☐ Craft a Story Arc and Visual Aides
- ☐ Create an Elevator Pitch
- ☐ Create a Pitch Deck
- ☐ Create a Video
- ☐ Write a Manifesto ☐ Create an Action Plan
- ☐ Design a Sell-sheet/Magazine
- ☐ Rehearse With a Live Audience
- ☐ Refine Your Story
- ☐ Prepare a FAQs

## \* CLOSE >>>

- ☐ Share and Re-share your Story
- ☐ Incorporate Feedback and Refine
- ☐ Get Resourcing/Action Plans Approved

**ESTIMATED TIME** TO DISTILL:

**ESTIMATED TIME** 

TO EXAMINE: