

# STRATEGIC DESIGN TOOLKIT

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DESIGN CAUCUS

# INTRODUCTION TO DESIGN CAUCUS

Design Caucus was created in May 2020 by students in the Strategic Design and Management Master's program at Parsons School of Design as a means of taking and encouraging action at this critical moment. The Design Caucus team expects students from across The New School to bring their own unique perspective, background, and ideas to Design Caucus where we will collectively work to change the world by design.

The goal is to leverage strategic design as a driver of social change at a moment when many of our systems are on the brink of failure as a result of the pandemic. For many communities these systems never worked well, and only served to maintain the norm. The team hope to catalyze designers seeking to subvert the status quo through design, and imagine a better future for all.

For this reason the team put together a toolkit to provide participants with a design thinking mindset before going into a design sprint-like event to talk about complex social issues. The Design Caucus team believes that strategic design could help to make the complex clear.



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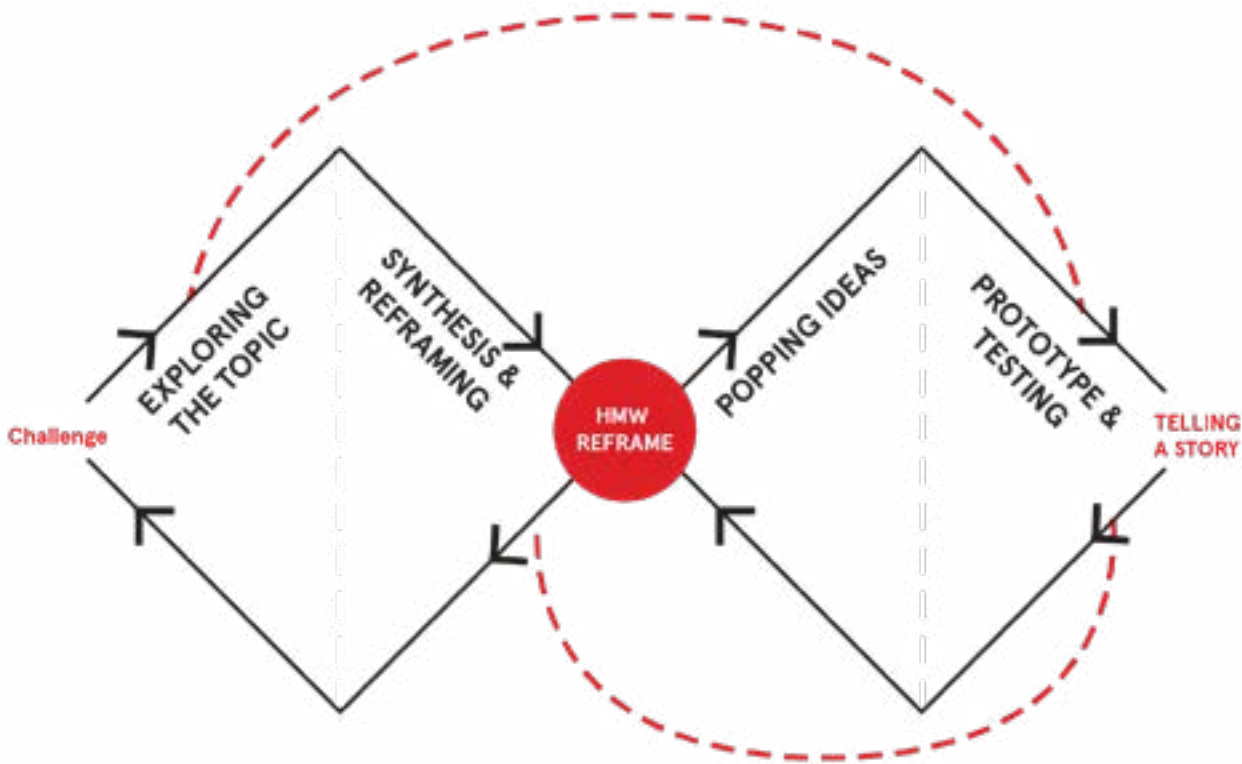
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## DESIGN CAUCUS

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We designed this toolkit to help you navigate the strategic design process. For each phase of the model, you'll find a range of methods that will help you unleash your creativity while keeping a human-centered mindset. Whether you're working on a long term project or participating in a sprint, this is a useful toolkit to understand the real problems, empathize with users, gain new insights and come up with exciting new ideas.



# 01. EXPLORING THE TOPIC

This is your starting point. You know what the design brief is, the challenge has been set, and now it's time to start exploring. Throughout your research your main aim should be to understand the context, review previous work around the topic, build empathy with the people you're designing for, and gather inspiration from different sources. At the Design Caucus we want to build social interventions at the systemic level, so it's very important that in this first exploration you really understand what are the assumptions, beliefs and values that people hold about the topic.

## DESK RESEARCH

Desk research is another name for secondary research. This type of research activity focuses on reviewing what other people have done, finding previous research work that has been done to gain a broad understanding of the subject of matter.

It is important to conduct secondary research before interviewing users, going on observation trips, or developing prototypes. This will allow you to get a quick and cheap understanding of the research domain and develop a better plan to carry out primary research.

Desk research will provide you with studies, news, statistics, and facts, that will help you recognize where your ethnographic research should focus: what types of users, what types of organizations, what types of relationships.

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	Title	Type of Source	Author	Main takeaway
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## OBSERVATION TECHNIQUES

As part of your initial research, it's important to gather information about your user based on what they do or demonstrate. There are multiple observation techniques you can use to gain a better understanding of the user experience and behaviors. Here we present three:

**Fly on the wall:** observation technique that allows you to collect data by seeing and listening. It's usually used to gain insight about people, objects, environment and interactions. The most important thing with this observation technique is that the researcher should stay completely unnoticed, so that users don't try to change their behavior. By using notes and recordings, the researcher can gather information about things that are happening in a specific environment or situation.



**Shadowing:** qualitative research technique where researchers observe real-life situations without interfering with the user. Generally, the researcher will either follow a participant's journey or perform a specific activity while being observed to gain a firsthand perspective. Shadowing can be a short exercise or a long term experiment, depending on what the researcher wants to learn about. This is why it's important to outline what your main goals are when following and observing a participant.

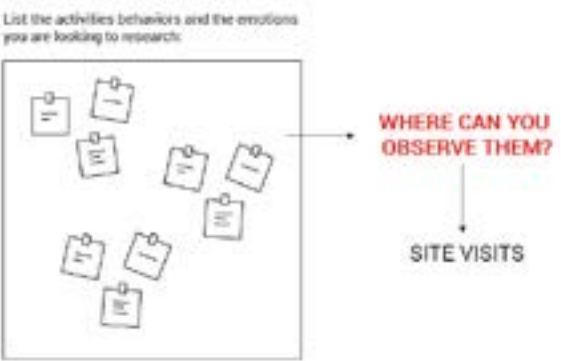
**ANALOGOUS RESEARCH**

Analogous research (sometimes called “analogous inspiration”) is a way to look for solutions in different contexts that may be applicable to your challenge or inspire an idea that is.

Use analogous research when you need a fresh perspective or overlapping themes on your topic or challenge, or when another sector more advanced in a particular area may hold lessons. The aim is to gather inspiration from unconventional sources and places.

To look for analogous inspiration, you first need to list the activities, behaviors and emotions you’re looking to research, and then write down settings or situations where you might observe them. Remember that it’s about gathering inspiration from parallel situations, so get creative and stay open to sources of inspiration.

**Contextual Inquiry:** method where participants are observed while they perform a task and simultaneously talk about what they’re doing. This is a powerful tool to give participants the position of a subject matter expert, where they are leading the session instead of answering questions. The ideal scenario to use this type of observation technique is when you want to learn more about a process and how your user navigates through it.



**SURVEYS**

Surveys are questionnaires that help us collect information. The main purpose of a survey is to gather information about a group of people to describe attitudes, opinions, behaviors, or characteristics. This is a great tool to gather big amounts of easily measurable data with objectivity. Here’s a quick guide to design your survey:

- Decide what your research goals are: you’ll need to form a clear picture of the expected outcome.
- Create a list of questions.
- Invite participants or send the questionnaire.
- Gather responses and relevant information.
- Analyse the results to find trends or unexpected answers.
- Write your main findings.



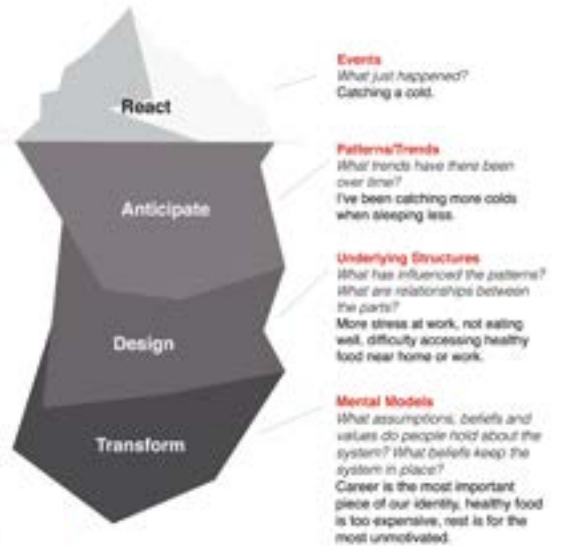
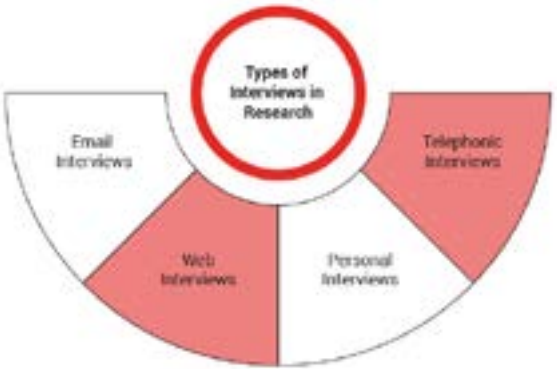
**« TO FIND IDEAS, FIND PROBLEMS. TO FIND PROBLEMS TALK TO PEOPLE.»**

- JULIE ZHOU

**INTERVIEWS**

It’s important to know the story of your customer. Stories help us connect, relate and empathize. Interviews are a great way to learn from stories that reveal personal insights and feelings that the designer can only be aware of by interacting with the potential user. There are some important things you have to keep in mind at the moment of conducting an interview while researching:

- Ask questions that allow the interviewee/users to give long answers.
- Never push your thoughts on the interviewee.
- Be mindful that open-ended questions can be good, but sometimes they can be too broad.
- Create a comfortable atmosphere
- Ask for permission to record. It is important to document the interview.
- Be aware of not only the user’s answers, but also their physical reactions, what they’re not saying out loud.



**ICEBERG MODEL**

The iceberg model is an integral part of designing for systemic change. This tool will help you discover patterns of behavior and mental models around a particular event. By navigating and understanding the 4 levels of the model, you’ll be able to identify and differentiate between perceived behaviors, patterns that allow us to forecast events, structures that cause said patterns, and mental models and values that are often subconscious.

To start using this tool, pick an event or behavior that you think is important, relevant or interesting, something that you really want to dig deeper and understand. Write the event at the top of the iceberg and work your way down following the guidance in the diagram.

# 02. SYNTHESIS AND REFRAMING

## EMPATHY MAP

An empathy map is a simple visual map that captures knowledge about a user's behaviors and attitudes. It is a useful tool to help teams better understand their users.

Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with their goals and challenges.

The mapping process can help synthesize research observations and reveal deeper insights about a user's needs. By using this tool, you'll be able to describe what the users think and feel, what they hear, what they see, what they say, and what they do.



## PERSONAS

Personas are character profiles, created based on previous user research. Personas help the researcher classify different types of users, understanding their specific attributes, motivations, needs, frustrations, experiences, behaviors and goals. Creating personas can help you identify different needs and expectations, providing a solid ground when you're ideating and designing for targeted audiences.

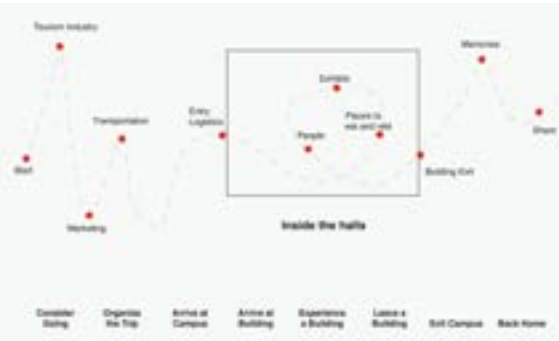
When creating personas, you should aim for details, providing specific descriptions and examples about how the character feels and behaves. Here we provide an example of things you'd like to know about your personas, but feel free to include other traits you consider relevant for your process. Personas will be key in the process of ideating and designing for a certain user.



## JOURNEY MAP

A journey map allows you to identify key moments in a specific experience or process you're studying. By plotting the experience of your user in each of the steps of the process, and documenting how a user feels about them, you'll be able to identify pain and pleasure points, which may be places for interventions or learning opportunities.

Start by outlining the different steps of the experience describing what the user does, and then identifying how they think and feel about each step. Then identify important touchpoints that could represent an opportunity for design. It's useful to use this tool with the persona map, so that you understand how different characters and users feel about a certain experience.



## ECOSYSTEM MAP

An ecosystem map is a graphic representation of the key roles and interactions what have influence on the user or the problem environment. It allows you to visualize the components of vast and complex systems, and the relationships that define how one affects the other. Those relationships are key to unveil insights about how things work, and ultimately how they can be changed. This is a quick guide to start building your ecosystem map. Collaboration is key in this exercise, as more points of views will add more knowledge to the map.

1. To start, place your user or challenge at the center of your map.
2. Start adding the different players and entities that have an influence in them.
3. Trace the connections that describe relationships between the different entities.
4. Highlight pain points or gaps in the map. This will help you identify points of intervention and opportunities you'd like to explore in the future.



## STAKEHOLDER MAP

A stakeholder map helps you define all the stakeholders of a product, project, service or idea. It allows you to visualize all the people who can influence your project and how they're connected.

You'll classify your stakeholders depending on the level of interest and the level of influence of the stakeholder.

Keep in mind that you should include the relevant stakeholders to your challenge. It is common to introduce additional levels of complexity to the stakeholders in order to analyze relationships among them and variables that are relevant to your project.



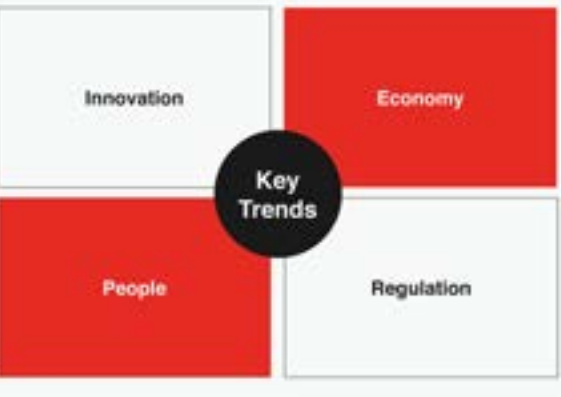
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Feedback	3.9 user rating on 100k rating	4.2 user rating on 10k rating	4.5 user rating on 10k rating	4.5 user rating on 10k rating	4.5 user rating on 10k rating	

**COMPETITIVE LANDSCAPE**

An effective competitive analysis allows you to quickly assess the market of a given solution space. Odds are there are already people trying to operate in the problem space with some kind of a solution. The competitive analysis is useful to assess situations where there are multiple organizations jockeying for the winning solution. Weighing them against one another by their advantages and disadvantages will influence your team's ability to deliver in gaps, or determine there is no viable solution forward in the problem space.

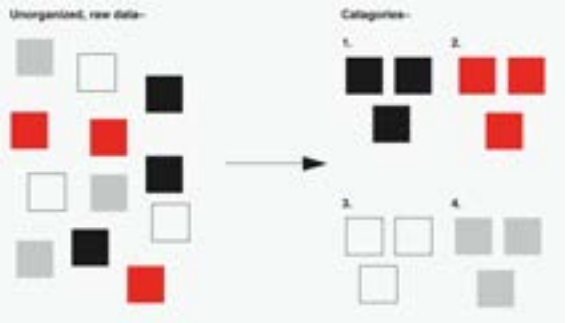
**TREND MAPPING**

Trend mapping allows you to identify the influencing trends occurring in a given system. This creates insights regarding how the system is being shaped, pushed, and shifted as a result of trends historically as well contemporarily. Identifying these meta systems participants will allow users to see ways in which they may be able to intervene effectively in the system.



**AFFINITY MAPPING**

An affinity map is a tool that helps researchers to categorize, organize and make sense of raw data. This could be relevant user quotations, data points, themes, ideas, or anything else collected throughout the initial research process.



After categorizing your raw data, you'll be able to unveil insights, see potential places for further investigation, or places for intervention.

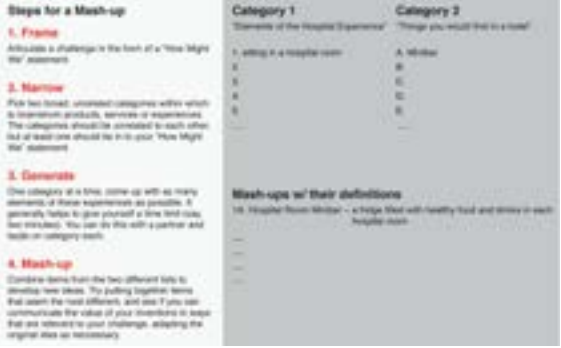
To start, use post-its to write down all the data points you find relevant and important and then, start making clusters of common themes. These clusters are the categories that will help you identify opportunities.

### 03. POPPING IDEAS

To start this part of the process, you'll need your insights and your new How Might We question. This milestone, the definition of a How Might We, will simplify the development of a solution suited for a specific problem. Now it's time to start popping ideas around solutions and interventions for your challenge.

**BRAINSTORMING**

We all know how challenging brainstorming can be. Getting creative may be hard at times. Just keep in mind to have fun with it. Here are the basic rules for idea generation. This is a group exercise! Warm up! Start with easy icebreakers around themes that are not related to your project and that will allow your team to feel comfortable sharing their ideas with each other. No idea is a bad idea. In a brainstorming session you should aim for quantity over quality. All ideas should be included. Encourage craziness and let your imagination fly high. Build on other's ideas. Be visual. Write down, draw, build. Do whatever you need to be visual. Here are some brainstorming techniques you can use:



**Related worlds:** If you are feeling stuck when trying to find an innovative solution to your problem or come up with a unique idea, this tool can be very useful. As the name suggests, you think about other “worlds” or contexts that have similar challenges and analyze how they solved the problem. (1)Think about your challenge and its characteristics. What are the activities, emotions, behaviours, reactions within the challenge? (2)Make a list of areas where similar challenges have been addressed. Remember to think about the specificities of your challenge, characteristics and all components when looking for similar challenges in

different contexts. Other countries? Other industries? In nature? In other companies? (3)Think about the reasons why they were able to solve the problem. How did they address the challenge? What principles made them succeed? (4)Think about ways to apply the lessons learned from them when you address your own challenges.

**Revolutions:** This technique will help you and your cabal challenge your assumptions about an issue so that you don't limit yourselves when coming up with new ideas. Many of these assumptions can even be unconscious, so writing them down will be extremely helpful. Consider the issue you are working on and write down all assumptions, rules and attributes that you can think of. Once you have these written down, think about what if's question that challenge each one of them. Try to remove these assumptions with your What If questions. Finally, come up with concrete ideas from the What If questions, just like we explained in the What If technique.

**Mashups:** Combining unrelated things/concepts together can help you generate fresh and innovative ideas and perspectives. Remember, your insight (new how might why statement) will always be your starting point when you ideate. (i) Select unrelated categories/areas. (ii) Brainstorm around each category. List as many elements as you can think of about each individual category. (iii) Combine elements from the different lists.



**Associated words:** This technique is all about associations and connections. Once you have your insights, you can use this powerful technique to come up with links and generate more ideas.

Think about a word that summarizes your insight or even just the first word that comes to your mind when you think about your insight. Then think about the first thing that comes to your mind when you think about that word, and repeat the process. Try to write as many related words as you can. We suggest you and your cabal spend at least 10 minutes in this exercise. If you are feeling stuck, we suggest you visit an online thesaurus. Remember, just as with any other brainstorming exercise, let your mind run free!



## 5 WHYS

Have you ever been annoyed by a toddler who keeps asking “why” several times? Well, now it’s the time to follow their example.

This method of asking why, five consecutive times, will help you get to the root cause of the problem instead of treating just the symptoms.

Think of it as if you had a headache. If you take aspirin it will probably treat the symptoms and the headache will disappear. However, if you keep digging, you’ll end up realizing that some of your daily activities were causing headaches! If you change your routine, you’ll likely won’t have to take any more aspirin because you found the roots of the problem.

## WHAT IF

This tool gives you the chance to think about the future and be open to all possibilities.

- 1) You start by asking a “What if…” question.
- 2) Answer the question, describe what would happen.
- 3) Describe what you can do to address the question.
- 4) Turn your answers into ideas.

Here’s a short example:

- What if all students could have a personalized program tailored to their needs?
- Every student would be able to develop skills according to their aptitudes and likes, they would be more successful and the world would be a more fair and happy place.
- We could train teachers to do that, we could hire a team of designers to make it happen, we could match likes and needs to a specific learning program.
- Build an app where you enter your likes and needs and it designs a learning program.

## POSITION MATRIX

You always need to understand what is happening in the market you are planning to enter with your service or product. If you know what’s going on, what the competition is up to and what are some current trends, you will be able to differentiate yourself and find your competitive advantage. What makes you different? What unmet needs are you fulfilling?

This tool helps you visualize where you are at with your product or service, within the industry context. Basically, where you are at compared to where the other competitors are.

Start by defining what are the variables that you want to compare and build a map where you can visualize where your competitors and your possible solution are.

Clearly State the Problem	
Why did this occur?	Is this a root cause? Y/N
If no, why did this occur?	Is this a root cause? Y/N
If no, why did this occur?	Is this a root cause? Y/N
If no, why did this occur?	Is this a root cause? Y/N
If no, why did this occur?	Is this a root cause? Y/N
If no, why did this occur?	Is this a root cause? Y/N
Root Cause: (must be the root cause)	Possible Solutions:

# 04. PROTOTYPE & TESTING

Concept ideation can lead to many possibilities that now need to be prototyped and tested. In this phase of the process you’ll go back to your users to collect feedback in order to validate or disregard said concepts. Using sketches, visual and physical representations, you’ll be able to share your concept with your user and test different parts of it. Also keep in mind that this is an iterative process, so you’ll want to prototype and test and go back to prototype over again. For testing, it’s important to set a specific set of indicators that can help you measure your progress.

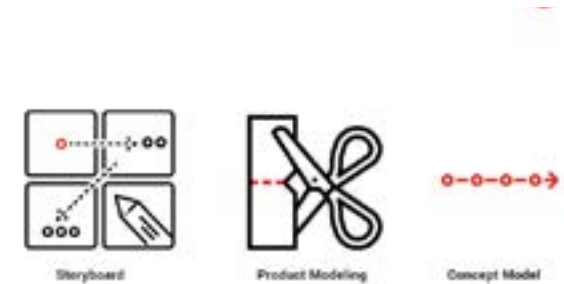
## GET VISUAL

when trying to test your ideas with users, it’s key that you can get as detailed as you can, and recreate your concept so that you can actually understand how they may interact with it. Here are some tools that can help you with that process.

**Storyboarding:** Visualizing your idea in a storyboard will help you communicate it easily and allow you to refine it. Just like a comic strap, sketch the different “scenes” of your story. Draw them step by step and have your personas interacting with the concept. Once you have it all on paper, you can interact with the process: Are there any key activities? Can you spot any problems? Does it need any rearrangements?

**Product modeling:** Product modeling is crucial to any concepts involving hands on design work. By demonstrating how a user would interact with the product, and how the product will deliver the necessary features, you’ll be able to give your audience tremendous insight as to how the concept will advance.

**Concept model:** A concept model may be the right fit for your concept if it is service or system oriented. By diagramming how your concept alters or changes the relationships of the system, you’ll be able to visualize the effect your idea has on the system and test if it’s a good fit.



## RAPID PROTOTYPING

Lo-fi prototypes are a useful tool to begin putting something in front of potential users. It gives a tangible representation to the conceptual product that users can give feedback on. Typically, lowest fidelity prototypes are made of paper and written down.

Another way to think of this tool is taking a concept from “I have an idea for a new app to help busy people” to “I had an idea for a new app, and this is how I think it could work.”



## SWOT

SWOT analysis is a technique for assessing the Strengths, Weaknesses, Opportunities and Threats of your concept or idea. By identifying these, you'll be able to keep developing your idea, and strengthening different aspects of it while also protecting it from external factors.

**Strengths:** Internal positive aspects of your idea/project that you can control/change. What will make this idea successful? What are the positive aspects of it? What makes it different from existing systems? This is the internal analysis of your idea. **Weaknesses:** These are the negative aspects or factors of your idea that are under your control. What needs to be improved? What could make the idea fail? What is the idea lacking? What

are the limitations your cabal has internally? As a team? **Opportunities:** Opportunities are external factors that can contribute to your idea's success. What are the current trends that can impact your idea positively? Any government regulations that could help you implement the intervention? **Threads:** External factors that can have a negative impact on your strategic intervention and that you have no control over. What is happening in the industry that could negatively impact you? Current trends that will affect your project negatively?

## LEAN BUSINESS CANVAS

Now that you've decided on an idea, it's time to come up with an actual plan. The Lean Business Canvas is a great tool used by entrepreneurs to design your business plan in a quick and easy way, simply filling out the different sections. By describing the problem, the solution, the unique value proposition, channels, customer segments, key metrics, cost structure, and revenue streams, you'll be able to understand what you need to make your idea work.



## STRATEGIC OPPORTUNITY MATRIX

This tool lets you explore four different growth strategies. By examining current and potential products and current and potential markets, you can analyze the four strategies and choose the one that best fits for your business/idea. You can revisit the SWOT analysis to make a better informed decision on what strategy will work best.

This are the four different growth strategies:

- 1) Market penetration: focus on current products and current markets with the goal of increasing market share.
- 2) Market development: use existing products to capture new markets.
- 3) Product development: create new products that can be sold in existing markets.
- 4) Diversification: create completely new opportunities by developing new products that will be introduced in new markets.

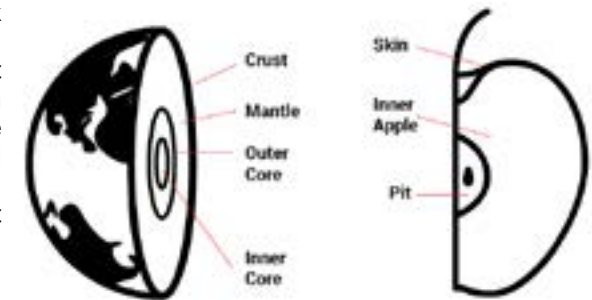


# 05. TELLING A STORY

After the prototyping and testing phase of the process, you'll finally have an outcome that you now have to pitch or showcase. You can have an awesome idea, but it is very important to know how to tell your story and why your concept is the best solution for your challenge. Stories are everywhere, are personal, connect us with each other, have a purpose, embody values, have shapes, are made up of moments, and spark the senses and emotions. These tools can help you build powerful stories.

## THIS FOR THAT

A typical way of sharing new business ideas in a quick format. Think: Uber for Pets, WeWork for Cars, etc. etc. This activity will help frame your idea in a new way that will ultimately earn your team a 2 second explanation of your work for potential investors or stakeholders. We recommend considering interpretations of this method for solutions outside the Silicon Valley box. Think: Guerilla Warfare for Social Media, Sit-ins for Comment Sections, Picketing for E-tail shopping, etc.



## STORYTELLING CANVAS

The storytelling canvas will give your pitch the components needed for a story arch. The specific sections allow you to define core elements of the pitch's purpose, effect, and intended outcomes. By doing this activity before the deck or pitch has been built, your team will set a benchmark to achieve at various stages of the pitch rather than an ill defined overall effect.



## ELEVATOR PITCH

An elevator pitch is a short description of your idea, explaining the concept in a way that any listener could get a clear overview of what you're selling and get interested in learning more. It's called elevator pitch because it should be short enough to present during a brief elevator ride. Here we provide a structure you can use to start drafting your elevator pitch.







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