Design Toolkit

Service Provider Human-Centred Design Toolkit

Tools for engaging with people who access your service to get a better understanding of their needs, goals, and experiences.

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Contents

SECTION 1

02 Introduction

SECTION 2

03 Empathy Maps

05 Journey Mapping

07 Personas

09 Feedback Grids

11 Making Sense of Qualitative Data

Introduction

The foundation of good service design is listening and engaging with people who actually use our services. This toolkit provides a few different tools for engaging with people who access your service to get a better understanding of their needs, goals, and experiences. These tools are designed to provide you with a framework to have meaningful conversations that yield actionable information to improve your services and ensure that you are meeting the needs of your clients.

Trauma-informed considerations

As a service provider, you are a capable partner in empowering people and affirming their autonomy and dignity.

When using engagement tools to guide a conversation with a client, clearly explain what the tool is and why you've chosen to use it. Make sure to listen deeply and ask the questions as they make sense. Think of these tools as ways to promote a deep conversation. You do not need to follow each tool exactly as the needs of the client should have priority. These tools should be used to build rapport and trust between client and service provider.

Be careful never to interject, re-define, or paraphrase a person's experience. Just take word-for-word notes. Some people might find it difficult to remember and/or describe how they felt during the situation. Be patient and give the people as much time as they need to reflect and end the conversation if you see signs of distress.

Some resources to direct individuals to if extra support is needed:

Distress Centre of Ontario 24/7 Distress Line
416-408-4357

Multilingual Helpline Support
905-459-7777 *(Languages available: English, Cantonese, Mandarin, Portuguese, Spanish, Hindi, Punjabi and Urdu)*

Talk Suicide Canada (Canada Suicide Prevention Helpline)
w. https://talksuicide.ca
t. 1-833-456-4566
Text to 45645
Live chat 4 p.m. to midnight EST

Kids Help Phone
w. https://kidshelpphone.ca
t. 1-800-668-6868
Text CONNECT to 686868
Live chat 7 p.m. to midnight EST

If you have any questions about these tools please contact Ben Balfour at bbalfour@overlapassociates.com

Empathy Maps

“Stepping into the shoes of another person to deepen our understanding of their perspective.”

What is an Empathy Map?

An Empathy Map is a simple, flexible tool to focus a conversation on a person’s sensory experience. It can be used to guide a five-minute conversation, or structure a 45-minute interview. Empathy Maps help us learn more about the perspectives of the clients you serve, from young children to adults. It is often used early on in the design cycle to build empathy, and to support engagement and early discovery.

Why use an Empathy Map?

Using an Empathy map will help you learn more about a person’s experience accessing your service or their experience day-to-day. It provides a guide for having a conversation that is focused, but lets clients share what they find meaningful and significant about their experiences. This approach provides us with a more holistic view of the clients’ experience than if we asked them a series of prescriptive questions.

Developing and consulting an Empathy Map helps your team consider the many forces around your clients that affect their experiences. Post the Empathy Maps where the team can see them daily. Check in from time to time: How would this feature of the project look to “Karen”? What would “Kareem” say about this change? What else will “Karl” be doing when he uses this?

How do I use an Empathy Map?

Developing Empathy Maps (real or imagined) will help you round out your understanding of a client’s experience. Whenever possible, invite real clients to fill in Empathy Maps first hand. As an alternative, you can fill in an Empathy Map thinking about/imagining what a client is thinking about. This approach isn’t ideal, but it’s better than not trying to understand your clients at all.

1. Draw a cartoon face in the middle of the page and draw lines radiating out from the face, dividing the page into six pie-shaped areas. Label these areas: Seeing, Saying, Doing, Thinking, Hearing, Feeling.
2. Identify some non-identifying demographics for this person (e.g., age, education level, occupation, etc.) and jot these down on the edge of the map.
3. Ask the client to imagine the last time they experienced the specific situation you’re interested in understanding. If you’re speaking with someone live, use the prompts to guide the conversation. If you’re imagining, put yourself in that person’s shoes and think about their experience of a given situation. When they approach it, what are they seeing? Saying? Answer all six questions on the map in as much detail as you can.
4. After you’ve completed your Empathy Map, list three things that a person wants and three obstacles to those desires. You may have developed Personas before (see page 7). An Empathy Map is similar to a Persona, but you spend less time describing someone and more time digging into how they would describe the situation. From that, you can extrapolate about their wants and needs.

EMPATHY MAP

Tell us about your experience.

What situation or experience are you thinking of?

What were you trying to achieve?

1.

2.

3.

What do/did you need to achieve this?

1.

2.

3.

What made it difficult to achieve the above?

1.

2.

3.

What single change would make the biggest impact?

The godfather of Empathy Maps is Scott Mathews.

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Journey Mapping

“Understanding the journey helps us map-out how we can improve.”

What is Journey Mapping?

Journey Mapping is a tool used to capture each part of a person’s experience and examine points for improvement and intervention—usually through a pen and paper exercise. Real-Time Journey Mapping involves working with participants to capture this information in the moment. This technique helps us gather information with greater detail and accuracy, leading to greater insight.

Why do we Journey Map?

Creating a Journey Map helps us expand our understanding of our clients’ experiences beyond what we see within our organisations. They help us break things down into steps and capture aspects of clients’ experience we don’t normally consider in detail. Journey Mapping also empowers clients to bring us along through all stages of their journey, which deepens our empathy and understanding of their experience.

Journey Maps offer a new way of looking at someone’s experience. Once we create a Journey Map, we can learn new things, which leads to new ideas, which in turn leads to solutions that improve people’s experiences.

How do we Journey Map?

1. Gather your materials. You’ll need a Journey Map worksheet and a pen.
2. Interview a client. Ask them what they’re doing right now, and write that down in the grey box on the worksheet that says “start here”. Then follow up on their answer (“What happened before that?”, “And before that?”) and record those steps too.
3. Ask what they expected to happen, asking individually for each of the steps. What did they hope to do? Did they think it would be easy, or hard?
4. Ask about the positives and negatives for each step. What did they like? What didn’t they like? What went well and what was really challenging?
5. Ask about how they would improve each step. What would they like to happen differently at that step to make it better?
6. Thank them for their time and their help. Tell them that they have made a valuable contribution.

JOURNEY MAP

Help us understand your journey.

We want to understand your experience, so please share whatever is relevant to you. You could choose to describe the last five things you did today or this week, five steps in your overall journey, or anything else. Just start by describing a current or recent situation in box 5 and work your way backward.

Describe the last five steps you took that got you here.

1	2	3	4	5 START HERE AND WORK BACKWARDS

During each of these steps, what did you expect to happen?

1	2	3	4	5

What actually happened? Describe your experience. (Positives and negatives respectively)

	1	2	3	4	5
+					
–					

How might we improve your experience?

1	2	3	4	5

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Personas

"Adding a layer of real-world consideration to the conversation."

What are Personas?

Personas are fictionalised accounts of people's lives. They are general enough to represent a segment of the community, but specific enough to help you imagine a real person and empathise with their needs. People often get presented with a lot of statistics and they can't always make the connection between these statistics and the real people in our communities. Personas use storytelling to turn the statistics into real people with real needs.

Why use Personas?

Whether you are developing strategies or solutions, consulting Personas as you go is a quick way to check that the needs and perspectives of diverse clients and interest holders are being represented. Using Personas will help you generate more diverse ideas. Everyone has different lived experiences that are dictated by their abilities, health, culture, and socioeconomic status. It can be hard to step outside of your own lived experience to imagine solutions to problems faced by people who are different from you.

Think of a problem. Now think of a solution. Do you think that someone who is vastly different from you would come up with the exact same solution? Maybe, but probably not. Everyone uses their own lived experiences to design solutions to the problems they face. Using Personas helps you examine problems using different lenses and perspectives so you can design ideas that take people's rich differences into consideration.

Whenever you're faced with a challenge or hard decision, pull out the Personas and review the situation from each Persona's perspective. Personas allow you to imagine how different clients would experience your design and how they might provide constructive criticism or changes.

How do I use Personas?

Once you create a set of Personas, *(see instuctions on the following page)* you can use them to test the solutions that you develop. Ask the following questions to help you determine if the solution you're considering meets the needs of your clients. This practice will help you figure out which solutions to move forward with.

1. Does this solution enable [Insert name] to achieve what they're trying to do?

2. Does this solution help [Insert name] overcome a barrier or challenge?

3. How can we improve the solution to make it as easy as possible for [Insert name] to achieve their goals?

4. What part of the solution might need to change to better meet [Insert name]'s needs?

Click here see an example of a set of Personas

Personas

"Adding a layer of real-world consideration to the conversation."

Assessing Data

Creating Personas helps ensure your engagement findings are actionable and memorable. Each Persona should be accompanied by questions to prompt thoughtful critique of design so you can make sure that the needs and perspectives of diverse clients are being represented.

1. Go out and talk to people who are impacted by the problem you are trying to solve. Some ways you might gather data include interviews, workshops, electronic or paper surveys, or through observations. People are often really bad at reporting what they do. Observing their interaction with a product or service gives us a more accurate look at what people really do versus what they say.
2. Draw out 6–10 human head shapes depending on the amount of data you have and the project timeline considerations.
3. Look at the quotes, needs, and insights you've collected through interviews, workshops, or other forms of engagement. Write them on sticky notes.

Things to consider:

- What stands out?
- What concise quote represents a particular theme?
- What is something someone said in an interview that was like a punch to the gut?
- Who's an outlier?
- Who's the norm?
- Who needs the most help?
- Who's someone who can offer the most help?
- What are the major issues that need more highlighting?

4. Place one quote, need, or insight sticky note within each of the head shapes and repeat until you feel that you've fairly (not necessarily exhaustively) represented a set of Personas.
5. Next, go through each Persona one by one and apply 8–20 insight sticky notes from the research that you have analysed. Remember you're creating fictionalised Personas grounded in your research. You should complete this step very quickly. No single Persona should match exactly an individual you've engaged with, but collectively, the Personas as a group should represent the range of experiences you've learned about in your research.
6. You can then type up your Personas or present them in a way that can support empathy and storytelling as you move forward. Alongside with the story you tell, give the Persona a name and refine the image you started with so it matches the fictional life you've created for the person — sketch the person or find an image online. Be careful not to reinforce negative stereotypes.

Create a set of Personas

Once you've organised and analysed the data, it's time to start transforming it into a set of Personas to inspire empathy. Start by reviewing the data for common goals, needs, and challenges, and start building out each new Persona by addressing the following areas:

1. Identify one or two goals a client might be trying to achieve. Write a few imaginative sentences about these goals to bring the Persona to life.

   [Insert name] is trying to...

2. Reviewing the data, identify and list two or three needs statements.

   (Note: A needs statement identifies a problem that needs to be solved, not a solution or idea)

   [Insert name] needs...

3. Think about the common challenges that are reflected in the data and list two or three statements about obstacles that clients face.

   Challenges for [Insert name] include...

4. Imagine what better means for the clients represented by the data. Here you can include ideas or solutions mentioned by clients.

   A better space for [Insert name] could be...

Feedback Grids

“Asking for feedback leads to powerful conversations that illuminate the path towards better.”

What is a Feedback Grid?

A Feedback Grid is a simple tool that helps clients share their thoughts about a solution. This tool uses four simple questions (What do you like, what would you improve, what questions do you have, any new ideas?) to guide a conversation about the solution we’re hoping to deliver.

Why use Personas?

People aren’t generally very good at giving honest feedback. This tool helps people articulate and share their thoughts—positive and negative—about a solution. Many people don’t feel comfortable offering what they see as “negative” feedback, which is unfortunate because negative feedback (or constructive criticism) is what helps us improve our solutions. The Feedback Grid is designed to ease people into providing constructive criticism.

We always start by asking what people like about our solution to get them comfortable sharing their opinions. Once we’ve established a dialogue, then we can move on to “What would you improve?” and “What questions do you have?”. Asking what can be improved rather than what people don’t like helps frame the question in a positive way. Similarly, the questions that people ask about a solution can help to show where our solution is lacking.

How do we use a Feedback Grid?

1. The most important members of the team are testers, who are— ideally—real end users of the product. Recruit representatives of your highest-priority interest holders.
2. Make a list of properties of your product that you want to test. Consult your Empathy Maps (see page 3) or brainstorm sessions with clients and other interest holders.
3. Build one or more working prototypes of the product that spotlight those properties.
   Click here for a Prototyping Guide
4. Establish testing criteria against which your testers will evaluate the prototype.
5. Make a schedule so you can tell your testers how long you’ll need their help. Invite real clients—not team members—to try out your working prototype(s).
6. Tell them how long the testing session will take and what you’d like them to do. Avoid telling them what you expect or hope for so you don’t bias their behaviour and responses.
7. Observe them unobtrusively and take notes about how they interact with the prototypes. Try not to interfere or interrupt unless the tester hits a dead end, asks a question, or breaks the prototype.

After testing:

8. Provide a feedback grid for each of the testing criteria to collect structured responses from the testers.
9. Ask the testers if they have any other observations or advice to share, and say “Thanks!”

FEEDBACK GRID

Tell us what you think.

Like	Improve
Questions	**New Ideas**

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Making Sense of Qualitative Data

“Quantitative data tells us how many, how much, or how often. Qualitative data can help us to understand why, how, and what happened.”

Improving services involves going out and talking to the people accessing our services. Asking people about their needs, goals, and experiences tells us a lot about how to improve, but only if we know what to do with the data they give us. The Transcription, Analysis, Synthesis, and Reporting Process provides an overview of how to uncover themes, patterns, and insights within the data you collect through interviews, Journey Maps, Empathy Maps, or other qualitative methods.

Things to keep in mind

Be ready to pivot: It’s not unusual to get 15% through a project, then change the course of action. Qualitative research often involves reassessing data as we uncover additional context and nuances. Sometimes we start with a research question, do some research, and realise that we need to adjust our question and reassess our data accordingly. This is qualitative research design, not bait and switch. It’s important to reserve space to pivot and respond to emergent findings.

Recognise the saturation point: Sometimes engagement yields more data than we can realistically analyse. When that happens, we have to know when to stop analysis. Data saturation refers to the point in a research process when we’ve collected and analysed enough data to create useful insights and any further collection or analysis won’t produce new learnings. You’ve reached saturation when continued analysis stops producing new insights.

Be rigorous: Rigour in service design research refers to trustworthiness. You can ensure rigour by practising the following:

- Triangulation: Use two or more engagement methods to collect data.
- Document outlier responses: Document all outlier responses so people know you’re not cherry picking the evidence.
- Validate the data: Check in with your clients and get their feedback to make sure your findings reflect their realities.
- Constant comparison: Compare new insights to data you’ve already collected. Comparing data will help you identify nuances that further your understanding.

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