<u>Innovating for Impact by Designing for Delight:</u> by Jared R. Call, CFM, FMP

Innovating for Impact is an often neglected pursuit as many of us get caught up in the day-to-day rigors of managing facilities. We often forget to take time to focus on innovation and specifically innovations that impact our customers.   The late Steve Jobs, one of this generation's foremost innovators, had this to say about innovation: "A lot of companies have chosen to downsize, and maybe that was the right thing for them. We chose a different path. Our belief was that if we kept putting great products in front of customers, they would continue to open their wallets."

As facilities managers we must keep putting great products in front of our customers in order to be seen as a vital business partner not just a line item on the budget sheet. One of Intuit's core values is "Innovate and Improve" with a focus on innovating for impact. Our goal as facility managers is to impact our customers in a positive way. Intuit takes this one step further. Our goal as a company is to "Delight" our customers any chance we get. This mindset infiltrates our organization and consequently the "Design for Delight" (D4D) process was born.

You may be saying to yourself "but I am not a Designer so how does this apply. Herbert Simon the Nobel Prize winning economist said, "Everyone designs who devises courses of action aimed at changing existing situations into preferred ones." Each one of us as facilities professionals has this daily challenge before us. Therefore, I would argue that we are all designers in our own spheres. If we are not, we are selling ourselves and our organizations short.

My grandfather was a shining example of this principle. In his mind there wasn't a challenge that couldn't be solved with PVC, duct tape or old peanut butter jars.   I am sure each of us has seen examples of such innovation in our lives and even in our own facilities.

D4D embraces Mr. Simon's words broadening the definition of a "designer" to include us all. D4D is defined as "going beyond customer expectations in delivering ease and benefit, evoking positive emotion throughout the customer journey".

Take a moment and think about the last time you were impressed by a product or service. What was it that impressed you? Upon further examination I bet the experience could be defined by the D4D definition.

The most innovative companies of today have figured out how to evoke the principles of innovation and embed them in their daily working culture. At Intuit Design for Delight goes beyond customer expectations in delivering ease and benefit throughout the customer journey, by following these development principles: Deep Customer Empathy, Go Broad to Go Narrow, and Rapid Experimentation with Customers.

Deep customer empathy begins with knowing your customer better than they know themselves. We need to be so in tune that we recognize their needs before they even know they need it.

There are a few tools to help us get in tune with our customers. The first is often referred to as an Empathy Map. We want to walk where our customers walk, experience what they experience and feel what they feel. In order to do this we need to get out and do some hands on research to uncover underlying motivations and beliefs that drive behaviors and words. Feelings are key to delivering delight.

After our research the Empathy Map helps teams understand the research findings at a deeper level. Follow these general guidelines to develop a successful Empathy Map:

1. UNPACK FIELD RESEARCH. What's surprising? Individually, write down your top 3 observations. Then, as a group, share each user's story out loud, one at a time. Take notes on Post-Its, capturing observations, quotes, and inferences.
2. WALK THE MAP. Stick Post-Its in the appropriate areas, starting with the explicit (say, do) and then to the implicit (feel, think) for each observation. "What did this person…
    SAY? (quotes and keywords)
    DO? (actions and behaviors)
    FEEL? (infer emotions using words/facial expression)
    THINK? (infer beliefs, logic—if I do this, then…)
3. IDENTIFY CONTRADICTIONS. Where did this person say one thing and do another? What motivation, belief or unarticulated need resolves these truths?
4. STEP BACK. Look for similarities or patterns across users.
5. CLUSTER. Group related observations and insights.
6. IDENTIFY. Identify a-has or insights for further exploration.

The next step to understanding and empathizing with our customers is articulating the understanding of the customer problem for user feedback by defining the problem statement. You have a hypothesis, or understanding, about the customer problem and need to articulate it to gain shared‑‑‑vision or customer feedback.

The Problem Statement enables stakeholders to clarify the problem, the root causes and associated emotions. Use the problem statement with the target customer to get feedback on how well this statement reflects their problem, and how painful this problem is relative to others, from their perspective. Using a simple Problem Statement template can help guide us rationally through our thinking.

The next principle of D4D is Go Broad to Go Narrow. Now that we have identified the problem and are in the right state of mind with our customer we must generate ideas to find a viable solution to the problem. The principle of Go Broad to Go Narrow is built around the concept that to get one great idea you need lots of them.

There are many different brainstorming techniques taught throughout the years. At this stage you can use any one that you are comfortable with. The concept of Go Broad to Go Narrow embodies them all. A few tips from my experience:

1. FOCUS ATTENTION by writing a provocative "How Might We…?" or "What ways can…?" question on the board.
2. QUIET IDEATION. To balance different thinking styles, spend 2---3 minutes capturing ideas individually, one idea per Post---It. Use Sharpies.
3. ENGAGE EACH PARTICIPANT by asking them to share an idea.
4. REINFORCE the idea by repeating and clarifying it, then sticking it on the board.
5. BROADEN. When ideation slows, build on ideas
6. CLUSTER ideas into themes.
7. NARROW the idea set by polling or voting.
8. HIGHLIGHT the winning ideas and discuss next steps.

To generate even more ideas when the stream has slowed to a trickle try one or more of the following:

- Add or remove constraints, for example, "what if we had a million dollars?" Followed by "what if we had $5 dollars?"
- Analogies and Metaphors: "what else is like <this>?" "What qualities are important?"
- Use opposites to spark energy and uncover unarticulated needs or desires. "What's the opposite of …?"

Lastly remember that brainstorms are only effective if their results are put into action which leads us to our next principle of D4D: Rapid Experimentation with Customers. Oft times we are afraid to roll things out until after we have all the bugs out. This often leads to a filibuster of potential ideas because we feel they aren't perfectly flushed out. As a result we often spend a lot of time developing something that doesn't actually meet the customer's need. Rapid Experimentation with Customers is built on the principle that you can never learn too early, or too often with customers.

Rapid Experimentation with Customers starts with creating a Concept Sheet. A Concept Sheet quickly captures the gist of an idea while being explicit about its benefits to the customer or business. A Concept Sheet is used to:

- Explain your idea
- Allow others to be able to understand it
- Hypothesize about the customer benefit

The following steps outline creating a concept sheet:

1. CHOOSE an idea to create a concept sheet about

2. EXPLAIN your idea with drawings and words
3. IDENTIFY what a customer would think was good about the idea, the problem it solves, and score the WOW factor.
4. GET FEEDBACK on the idea from team members or colleagues (A Concept Sheet should not be shared with a customer because you don't want to reveal your hypotheses)

Concept sheets are used to help us vet our ideas internally before sharing them with customers. Concept sheets can help us anticipate what a customer's reaction might be and look for opportunities to Delight at any potential pain points. After fully vetting our chosen concepts it's time to reach out to our target audience and test our hypothesis. You do not need to have a fully functioning prototype as discussed earlier. Modified versions of the concept sheet, a story board or a rough prototype can be used to learn more about a customer and their problem and to find out what a customer likes/dislikes about a concept and what is really important to them in a solution before spending too much time developing an idea. Outlined below are general principles to follow when soliciting customer feedback:

1. CREATE a prototype concept
   a. Prototype early – it allows you to fail early, which is less costly than failing late.
   b. Prototype rough – invest as little time as possible in the prototype.
   c. Prototype rapid – you won't get too attached to any one design.
   d. Prototype right – focus on a single important question you want to answer.
2. WRITE questions you will ask the customer
3. ASSIGN an interviewer for each concept to be tested
4. SHOW your target customer your concept
5. ASK them to explain what they think is going on with the concept
6. ASK open-ended questions to get their reaction to the concept
7. TAKE NOTES on what you hear – likes, dislikes, insights and surprises. Make sure to record as many direct quotes from the user as possible

Following these steps will allow you to know if you are headed in the right direction or whether you need to have a change in direction. Remember the goal is to Delight out customers not just meet their needs. This is exponentially harder to accomplish.

The steps outlined throughout the various principles of D4D may seem daunting but they actually can be done informally and rather quickly. It's the mindset we must adopt in order for us to continue to be successful partners in creating good business by delighting our customers wherever we can. Remember we are all designers!