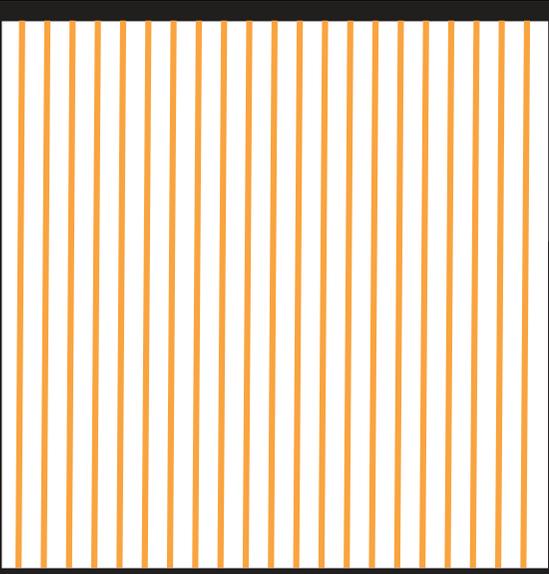
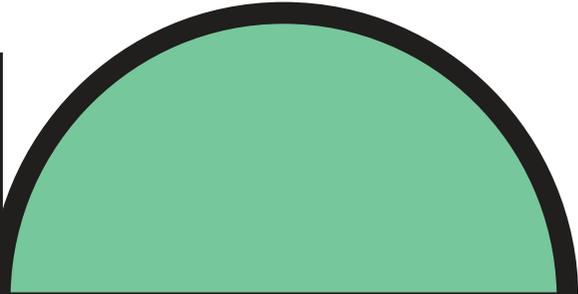


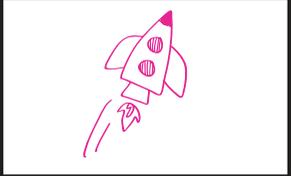
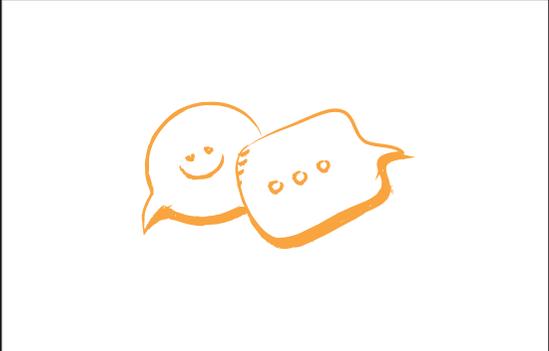
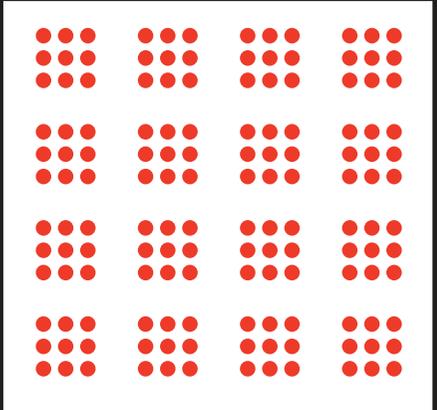


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Resilient nations.



THE SOCIAL INCUBATION PLAYBOOK

Empower grassroots social incubation





*Empowered lives.
Resilient nations.*

UNDP THAILAND

UNDP works in some 170 countries to support the achievement of the Sustainable Development Goals. UNDP has been present in Thailand for more than 50 years as a trusted partner of the Royal Thai Government and people of Thailand. Working as part of the UN Country Team, UNDP aims to advance inclusive sustainable and human-centered development for all people in Thailand. In all our activities, we encourage the protection of human rights, and the empowerment of women, minorities and the poorest and most vulnerable.

In Thailand, UNDP works with a broad range of partners to provide policy advice, technical expertise and implementation support in areas such as environmental and biodiversity conservation, climate change adaptation and mitigation, anti-corruption, community livelihoods, and government and social innovation.

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INTRODUCTION

As the world is moving forward to achieve the Sustainable Development Goals, there are still many actions to be done. Poverty, unemployment, underemployment and lack of economic opportunities are key barriers to development in many parts of Thailand. Limited access to resources and to quality education have generated income instability, especially for those who live in rural areas, which can translate into confrontational narratives, thus reinforcing perceptions of social exclusion across the country.

Social enterprise and social innovation address challenges and opportunities within communities and, in many ways, promote inclusion of the most vulnerable and marginalized as well as provide a platform for voice and economic participation for those who are left behind. They can potentially be great tools to tackle today's challenges that are increasingly complex, interrelated, and unpredictable.

In recent years, there has been a continual increase in number of social enterprises in Thailand due to growing public awareness and the creation of social enterprises through various incubation programs such as Banpu Champion for Change, School of Changemaker, and SE101 of the Stock Exchange of Thailand (SET). With the Social Enterprise Promotion Act passed in February 2019, the trend is expected to persist. However, a majority of social enterprises and social innovation knowledge and resource networks and platforms are located in Bangkok, while in reality, there are many potential talents and conveners living all over the country.

Moreover, each region of Thailand is very different in term of needs, challenges, conditions, resources, etc., therefore, a deep understanding of local context and a wide range of networks to connect with are crucial. For this reason, local people and local spaces are ultimately the key sites of development to further develop the social enterprise and social innovation ecosystem in each respective region. Thus, it is necessary to disseminate knowledge and resources to a wider area – to localize social innovation and social enterprises for a greater societal impact and collectively achieve the Sustainable Development Goals by 2030.

AN INITIATIVE OF



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THAILAND
SOCIAL
INNOVATION
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IN PARTNERSHIP WITH

ChangeFusion
GROWING SOCIAL ENTREPRENEURS

PRODUCED BY



This playbook aims to empower the capacity of grassroots incubators anywhere to be able to nurture and grow social activists, innovators and entrepreneurs.

Choose your own journey. Whether you are an aspired changemaker or an established champion in your local community, the tools in this playbook can be useful to create your own development journey.

It's a social tool. The playbook itself can act as a social tool to connect people for learning and change making. It encourages its users to identify or create a high level of engagement with different people in their community around using tools. Based on research, high community engagement has been identified as one of the key success factor for changemaking in local context.

Refreshed selection. The playbook offers a set of tools and methods consolidated from deep research in collaboration with various schools and organisations that are most suitable for local communities context.

INITIAL ASSESSMENT

In this playbook we use the terms “changemaker” and “champion”. Changemaker refers to the social entrepreneur, social innovator, or social activist. The champion refers to the incubator or support programme that is helping develop changemakers.

If you want to become or currently are a “changemaker”, the statements help you identify whether you are a social activist, social innovator, or a social entrepreneur, and where you are currently at in your changemaking journey. The result will direct you to a starting point in this playbook that is customised for you, from which you can create your own development journey.

If you want to become or current are a “champion”, the assessment will help identify which incubatee profile will best suit you, and how you can best help grow through small actions that are easy for anyone to start.

Simply check the box of the statements that are most corresponded to you to identify if you want to become a “Social Activist”, a “Social Innovator” or a “Social Entrepreneur”. Each profile page will help direct you to the first tool to start with in this playbook, and design your own journey each time you use a new tool. However, you can also decide to choose your own profile and which tool to start with another tools in the same color category suggest by the tools symbols.

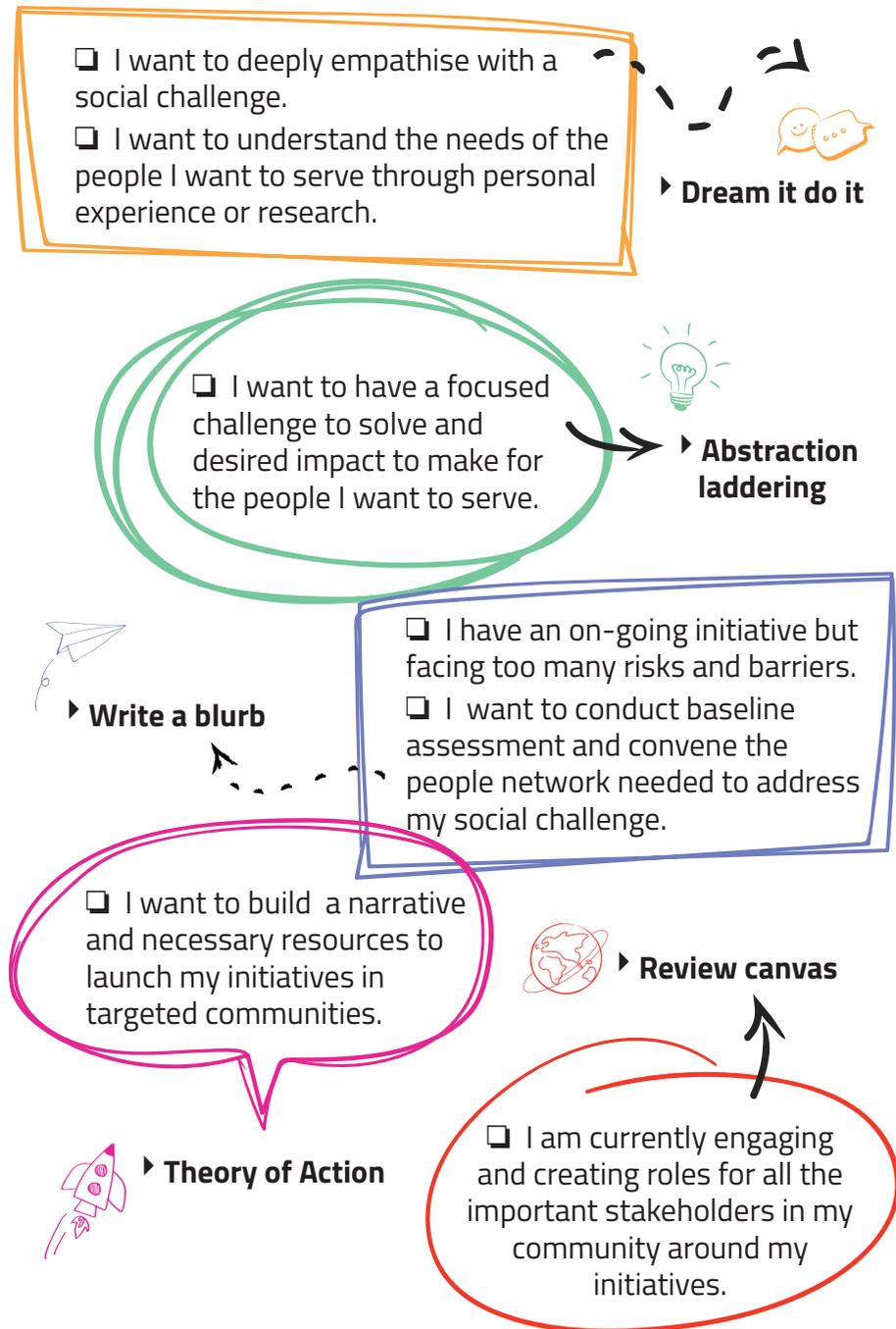


I want to convey a strong social vision and inspires internal and external stakeholders to help realize that vision.

BECOME A SOCIAL ACTIVIST

A "Social activist" is someone who feels strongly about a social cause and is actively involved in fighting for a change in society. They put effort to raise awareness or convene collective actions in social, political, economic or environmental reform.

If you choose to be a "Social activist", check the statements that are corresponded to you to find out the tools can be used to grow your journey.



I want to create innovative solutions to solve a social challenge or serve the changing needs of the people in my local community.

BECOME A SOCIAL INNOVATOR

A "Social innovator" is someone who create new social practices that meet social needs in a better way than existing solutions. They brings together ideas, resources, tools and case studies for finding practical solutions to social problems such as human rights, healthcare, education and public services that extend and strengthen civil society's relationship and collaboration. Social innovation product, service or model enhance both societal capital and society's capacity to act.

If you choose to be a "Social innovator", check the statements that are corresponded to you to find out the tools can be used to grow your journey.

I want to explore different solutions and opportunities to creating change

I have a particular social challenge I want to solve

 **Challenge unpacked**

I want to have an impactful idea that I can further develop to be a good social solution

 **Brainstorming techniques**

 **Rapid prototyping**

I have started/ failed initiatives before on the challenge I care about, and I am searching for an idea that works in my context

I want to have a clear plan on how to implement my initiatives

 **Review canvas**

Theory of Action



My initiative is ready to upscale in terms of volume, market and impact initiatives.

I want to build a successful enterprise that has a social mission and is financially sustainable for myself and others.

BECOME A SOCIAL ENTREPRENEUR

A "Social entrepreneur" is someone who pursues a business venture that have the potential to solve social challenges. They bring social innovation ideas to reality by applying a commercial strategy to create a practical and sustainable business model, maximising both social and economical impact for all stakeholders.

If you choose to be a "Social entrepreneur", check the statements that are corresponded to you to find out the tools can be used to grow your journey.



The following statements indicate your potential to grow. Where there's a box unchecked, revisit the corresponded statements. Each time you use a new tool, think of ways on how you can improve the personal gaps through Reflection spaces and use the Notes section to help you advance your skills. Have a conversation with a champion around the Reflection questions and Notes on how to best address personal gap in your chosen journey.

- I like to give myself challenges when I take on new projects
- I always see the glass as half full instead of half empty
- I can gather local support and resources that I need for my initiative
- I am not afraid to lead others
- It's easy to motivate others to work with me
- I am currently taking actions that effectively help me achieve my social mission
- I am fairly curious and always in a search of discovering new ideas
- I am capable of seeing many solutions to a problem
- There is time for thoughts but action is more important
- After a failure, I am able to pick myself up and start over
- I have a deep expertise on my initiative and I'm convinced that I can carry it out successfully
- Where others see problems, I see opportunities
- I know how to select an idea to work on and turn them into a good implementation plan
- I always try to take calculated risks
- I prefer being my own boss
- I can handle stressful situations effectively
- I am ready to make sacrifices in order to succeed
- I have a clear vision for my initiative for the next 3-5 years

TOOLS SELECTION

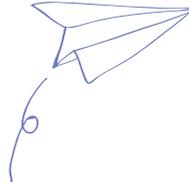
There are five categories of tools that you can use to pursue your goal. Each time you use a tool, you will better understand your changemaking goals and how to reach them. Each tool will lead you to advance your skills to a higher engagement level to achieve the same goal, or help you progress to the next stage of your changemaking journey. Try out different tool and revisit your goals over time base on how you learn and grow.



SEEKING THE SPARK



DEFINING IDEAS



TESTING IT OUT



GETTING OFF THE GROUND



BECOMING CHAMPIONS

SEEKING THE SPARK



The problems you're trying to solve are rarely your own, they're those of particular users. Build empathy for your users by learning their values through observations, engagement and immersion tools, and unpack your empathy findings into needs and insights to scope a meaningful challenge.

Based on your understanding of users and their environments, defining the challenge will help you come up with a unique design vision that you can leverage as a fundamental to creating a successful solution. In order to be truly generative, you must seek the spark that help you reframe your challenge based on insights gained through empathy work and understanding of your vision for change.

Low level of engagement:

tools that are fairly simple and can be self administered, requires only observation or relatively less time.



- ▶ Dream it do it
- ▶ User profiling
- ▶ User universe

Medium level of engagement:

tools that requires interaction and collaboration with users, colleagues and peers



- ▶ Challenge unpacked
- ▶ 5 Whys
- ▶ Abstraction laddering
- ▶ Service safari
- ▶ A day in life

High level of engagement:

tools that are more complex and require more time, revision and strategic consultation with seniors, colleagues and peers over time.



- ▶ POV
- ▶ I'll follow you
- ▶ Photo library
- ▶ Interview 101

DEFINING IDEAS



You ideate in order to transition from identifying a focused challenge and desired impact to exploring solutions and generating radical design alternatives. The goal of the following tools is to help you explore a wide solution space—both in large quantity and broad diversity of ideas. From this vast repository of ideas, you can build prototypes to test with users.

Leverage the ideation tools to harness the collective perspectives and strengths of your team or of different stakeholders in your community your team. Step beyond obvious solutions to uncover unexpected areas of exploration and drive innovation. Focus on having the fluency and flexibility to create both volume and variety in your innovation options.

Low level of engagement:

tools that are fairly simple and can be self administered, requires only observation or relatively less time.



Medium level of engagement:

tools that requires interaction and collaboration with users, colleagues and peers



▶ **Brainstorm techniques**

High level of engagement:

tools that are more complex and require more time, revision and strategic consultation with seniors, colleagues and peers over time.



▶ **The 5 Games**

TESTING IT OUT



Get ideas out of your head and into the world. The following tools help you create prototype and test that are inexpensive and low resolution to learn quickly about your solution and explore possibilities. A prototype can be anything that takes a physical form—a wall of post-its, a role-playing activity, or an object, which you can use to test iteratively in the appropriate context of your user’s life.

Prototypes are most successful when people—you and your design team, your users, and others, can experience and interact with them. They’re a great way to start a conversation and inspire others by showcasing your vision. What you learn from interactions with prototypes drives deeper empathy and gather feedback that shapes successful solutions.

Low level of engagement:

tools that are fairly simple and can be self administered, requires only observation or relatively less time.



- ▶ Write a blurb
- ▶ Storyboard

Medium level of engagement:

tools that requires interaction and collaboration with users, colleagues and peers



- ▶ Rapid prototyping
- ▶ What-if scenarios
- ▶ Feedback capturing

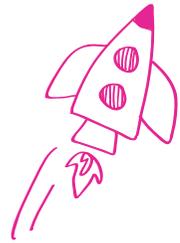
High level of engagement:

tools that are more complex and require more time, revision and strategic consultation with seniors, colleagues and peers over time.



- ▶ Wizard of Oz
- ▶ MVP

GETTING OFF THE GROUND



Take actions to launch and implement your change initiative. The following tools help you craft an action plan and gather resources to act on your solution. At this stage, you want to already learned as much as you can about your users, developed several iterations of your solution and refined the framed challenge correctly to avoid going back to the drawing board.

Initiatives are most successful when you and your team have the right ability, motivation and opportunity. Identify local champions who can help you with their experience and expertise to generate concrete actions that help everyone move towards your goals.

Low level of engagement:

tools that are fairly simple and can be self administered, requires only observation or relatively less time.



Medium level of engagement:

tools that requires interaction and collaboration with users, colleagues and peers



- ▶ **Market Sizing**
- ▶ **Plan for Action**

High level of engagement:

tools that are more complex and require more time, revision and strategic consultation with seniors, colleagues and peers over time.



- ▶ **Theory of Action**
- ▶ **Impact Business Model Canvas**

BECOMING CHAMPIONS



If you have already started and have sustainability in your change initiatives, the following tools can help you review your experience, what can be done differently and how can you continue to empower other changemakers in new ways.

There are plenty opportunities to address economic, social or environmental challenges at different level. Social incubation provide crucial support in terms of professional development and resources at the early stages of social initiatives. Become a champion in your community to design new ways of incubating changemakers who can bring in new inspirations and ideas for social impact at grassroots level. It is yet another exciting impact making journey to explore. Visit other tools in this playbook as they are useful not only for you to reccommend for your changemakers but also to build and grow your own incubator.

Low level of engagement:

tools that are fairly simple and can be self administered, requires only observation or relatively less time.



Medium level of engagement:

tools that requires interaction and collaboration with users, colleagues and peers



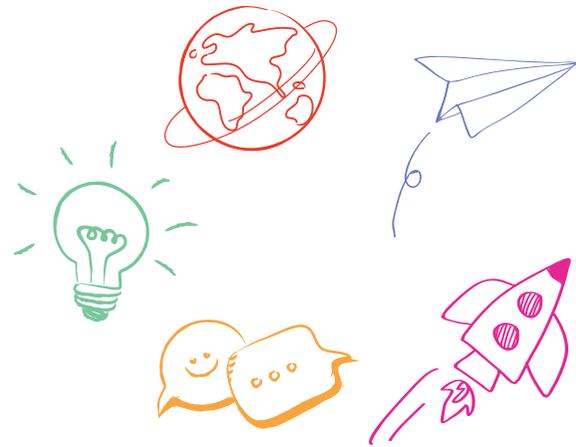
▸ **Review canvas**

High level of engagement:

tools that are more complex and require more time, revision and strategic consultation with seniors, colleagues and peers over time.



- **Social incubation canvas**
- **Coaching canvas**
- **Impact Bento**





DREAM IT DO IT

Created by: *The Changemakers Toolkit* by School of Changemakers

When thinking about a social initiative, people mostly jump to thinking about activities. Though in order to create change, figuring out where to start is the most crucial part to begin. Start from your interest and passion or choose a topic that are close to your heart will give you the inner strength to get through barriers and hardship.

How:

Review what are your skills, interests, problems or who you want to help. Then combine your unique skill/ interest with problem/ target will result in getting started on your very own fun and creative ideas.

Where to next?

Try Challenge unpacked or 5 Whys to understand the problems better, or User universe to have a focus target for your idea.

- ▶ Challenge unpacked
- ▶ 5 Whys
- ▶ User universe



SKILLS

- What are you good at?
- What are your unique skills?

Example:

Taking photos, programming, coordinating, languages, giving presentation

INTERESTS

- What are your hobbies?
- Any activities you love to do in your spare time?

Example:

Football, painting, traveling, movies, cats

PROBLEMS

What are the problems in this world or in your own community? Which one do you feel most strongly about? Pick the most concerned one

Example:

Teen pregnancy, waste management, smartphone addiction.

TARGETS

Identify one target group you want to help out the most. Be as specific as you can.

Example:

Refugees, slum dwellers, stayed dogs

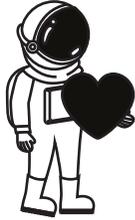


Choose one item in  and match with one from  to create ideas. Avoid self-censoring, focus on the flowing of ideas rather than considering too hard on the possibilities of each idea. One matching can result in many ideas, list them all out! Try to think about ideas that are doable in action, rather than conceptual ideas.

Example 1: INTEREST: Movie + TARGET: Strayed dogs = Create a short film featuring smart and caring strayed dogs so people want to adopt them

Example 2: SKILL: Programming + CONCERN: Waste = an application to measure waste from villages who produce less garbage will win awards.

DREAM IT DO IT



SKILLS

- What are you good at?
- What are your unique skills?
- What can you do better than others?

Swimming? Cooking?
Programming?

.....
.....

INTERESTS

What are your hobbies?
Any activities you love to do in your spare time?
What make you happy doing it?

Reading? Cats? Physics?

.....
.....
.....

PROBLEMS

Which social problem really concerns you?

Teen pregnancy, waste management, education?

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.....

TARGETS

Which target groups you want to help ou?

Underserved youth?
Immigrant? The elderly?

.....
.....
.....

IDEAS

Generate ideas by combining one item from skills or interests to solve a chosen problem or to help your target



Tip: If you can't think of anything to write down, allow yourself more time or skip it and start with another tool.

Reflection: Do you know anyone who are happily doing what they're good at for a social cause? Find out more about their journey through the internet or approaching them in person.

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Notes:

The aim of this exercise is to help you start an initiative for yourself, not just any idea. If you cannot answer much, it means that you are open to explore more or start engage with other changemakers such as volunteering to learn what you're interested in.

Additional self-assessment tools can help you understand deeper your level of expertise and passion, as well as the assets you may acquire with the relevant experience you need or can have.

INTERVIEW 101

Reference: : *Design Thinking Bootleg* by
D.school Institute of Design at Stanford

Interviewing is a powerful approach to gain empathy and surface user's underlying needs, emotions and motives that are usually difficult to gather in a quantitative research. By interviewing users you will begin to better understand a person's behaviors, choices, and needs.

How:

It's essential to plan your discussions ahead of time. You may not get to every question you prepare, but you should come in with a plan for engagement. Interviews should be done in-person and in pairs so that one person can converse while the other captures.

Where to next?

Use 5 Whys, or User Profiling or A Day in Life as mapping tools to document valuable user' data during the interview.

- ▶ 5 Whys
- ▶ User Profiling
- ▶ A Day in Life



PREPARING FOR AN INTERVIEW

Brainstorm questions. Write down as many potential questions as your team can generate. Build on each other's ideas to flesh out meaningful subject areas.

Identify and order themes. Identify themes or subject areas into which most questions fall. Then, determine the order of questions that will allow the conversation to flow most fluidly. This will decrease the potential for a scattershot interaction with users.

Refine questions. Once you've grouped your questions, you may find redundancies, or questions that seem strangely out of place. Cut them out and paraphrase the questions to be short and concise, ideally 10 words each.

Be sure to include plenty of "why?" questions, plenty of "tell me more about?" questions, and plenty of questions directed at how the user "feel". Open ended questions allow for stories and stories lead to insights for design solutions.

Context research. Do some background research on their community or industry and become familiar with the terminology, culture, context, as well as recent events and trends. This help you identify rich opportunities to explore when they come up during the interview.

INTERVIEWING TECHNIQUES

Ask why. Even when you think you know the answer.

Never say "usually" when asking a question. Instead, ask about a specific occurrence. "Tell me about the last time you"

Encourage stories. Stories reveal how users think about the world. Look for inconsistencies. What users say and do can be different. These inconsistencies often hide interesting insights. Avoid asking only yes or no questions.

Pay attention to nonverbal cues. Be aware of body language and emotions. Don't be afraid of silence. When you allow for silence, you give users time to reflect on their answers—which may lead to deeper responses.

Ask questions neutrally and don't suggest answers. "What do you think about buying gifts for your spouse?" is better than "Don't you think shopping is great?"

Take "quotes" and not "notes". Quotes are the most accurate documentation of not only what the user say but also how they say it. Don't write your interpretation of what the person says. If you are the only one interviewing, use a voice recorder to capture information that you get from the data.

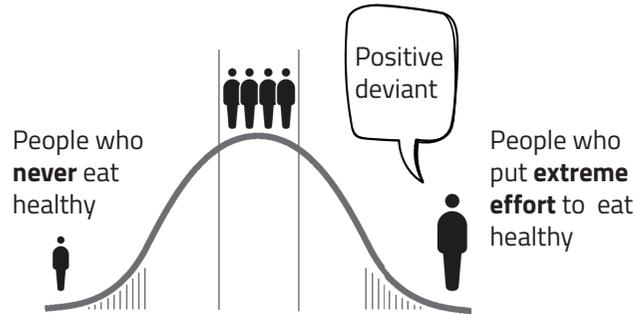
INTERVIEW 101



Step 1: Find users

Hunt for the extreme users with amplified needs rather than the regular wider population. Extreme users are those who take extra effort in order to engage or disengage with the challenge. For example: If you're looking to encourage healthy eating, your extreme users will be those who never eat healthy or gym addicts.

Contact your interviewee in advance if you may, otherwise don't be afraid to approach and talk to strangers. Note down the names, contact information and other personal information in case you would need to follow up with the same user for testing.



Step 2: Prepare for the interview. List down the questions and tools you may use for the interview.

User life: *What are some key things you want to understand about this person's life? E.g.: Their motivators, demotivators, norms, values and or beliefs.*

Introduction: *How are you going to introduce yourself and the purpose of the interview?*

Surfacing: *What are the open-ended questions you can ask that will surface useful information?*

Go deep: *What are some questions that can help you understand more about his person's hopes, fears or ambitions?*

Baseline and context: *What are some open-ended questions you can ask about his person's life in the community, it's history and cultural practices?*

Other questions: *Do you have any other questions you think are important?*

Tip: To establish rapport, start with small talk. Look for a neutral subject of common interest, try to sense your user's communication style and energy, and trying to consciously match that. Avoid the temptation to talk about your own opinion or expertise.

Note:

There are several other aspects to observe beside interviewing with the user:

Who doesn't seem to be present at the interviewee's personal space? Is there anything or anyone you would expect to see that you don't?

Where does the interviewee like to gather or hang out? When do they do this?

What are some notable routines that the interviewees have?

What symbols reveal the aspirations of families and individual in the community?

What may suggest what is important to the interviewee? What do they seem to be proud of?

What seem out of place or unusual for you?

USER UNIVERSE



We use the user universe to understand who is involved and uncover stakeholders that go beyond the obvious ones. This is valuable because we might bring different stakeholders into the solution or find new ways to help them out.

How:

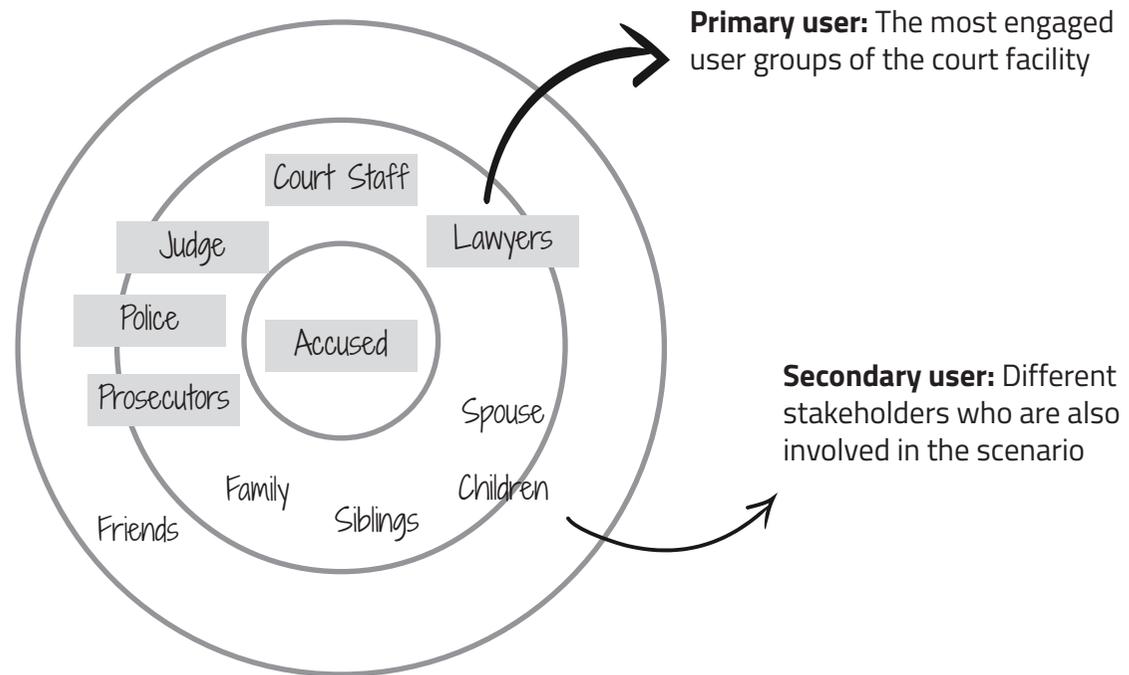
Research or get your team together and brainstorm all the different people who are involved or affected by a your identified problem, directly or indirectly. Who might you want to speak with? Are there users you need to serve that are neglected or underserved?

Where to next?

Try User Profiling and similar tools to understand each of your user group better.

► User profiling

DESIGN SCENARIO: Improving user experience in a national court.



Who are the users involved in the court system? Typically, we think of the users that are in the grey boxes above – but it turns out that there are many more. They are underserved users and a big opportunity to improve services!

USER UNIVERSE



Step 1: Define

Select a challenge to solve and write down a design scenario for that challenge

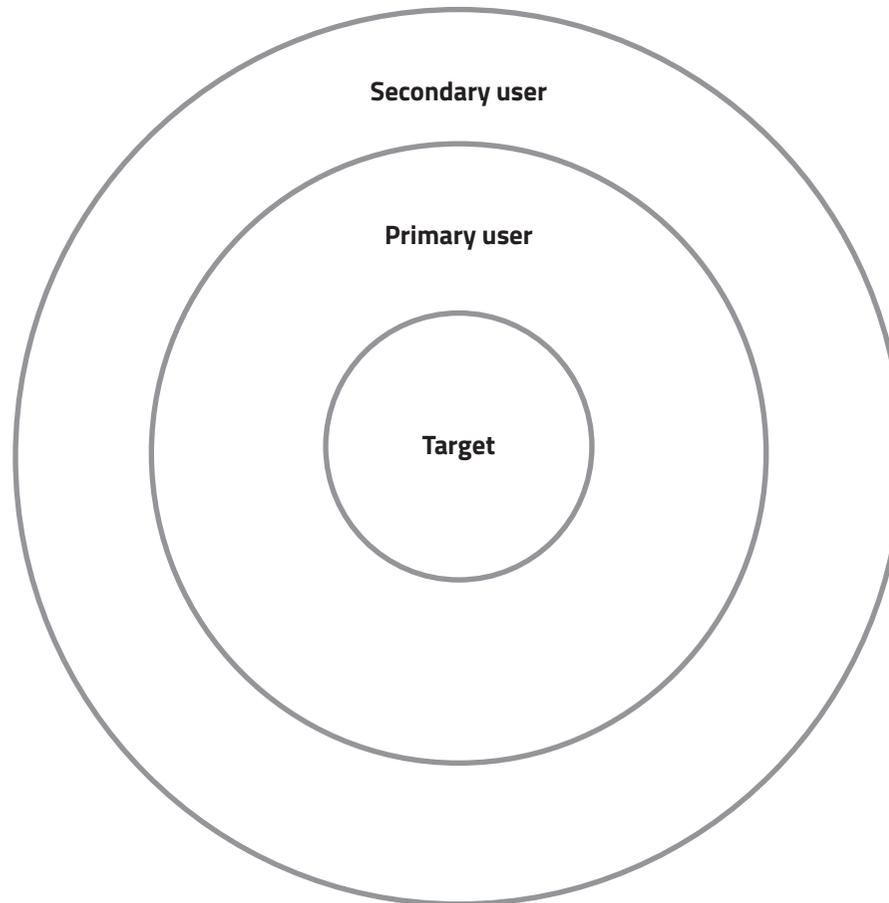
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Step 2: List

List different users or stakeholders that are involved in the problem stated above. Who might you want to speak with? Are those users you need to serve that are neglected or underserved? Categorise them into primary and secondary.

Step 3: Select

Select one of the primary users to be a target user you want to serve.



Tip: If you're not sure who are secondary user, they're usually the ones who only interact with the scenario indirectly through the primary users.

Reflection: *What problem are you solving for the targeted user in this design scenario?*

List out all the possible problems so you can review and refine a problem statement, and clearly understand user journey in next steps.

.....
.....
.....
.....

Notes:

This exercise aims to help you uncover underserved users groups who may potentially meaningfully impact the primary user' experience. If you want to choose a secondary user as your target, you may need to review and refine your problem statement and design challenge.

Use additional empathy tools to understand better the targeted user and the opportunity to act for/ with them.

USER PROFILING

We use user profiling to fully understand user's perspectives and make sure your work focuses on the people instead of an abstract description of the group they said to represent. Specific actions are often driven by characteristics, behavior and underlying motivations and needs. If we can understand them, we will be able to not only see opportunities to provide solutions, but the solutions we provide can significantly be more impactful to their lives.

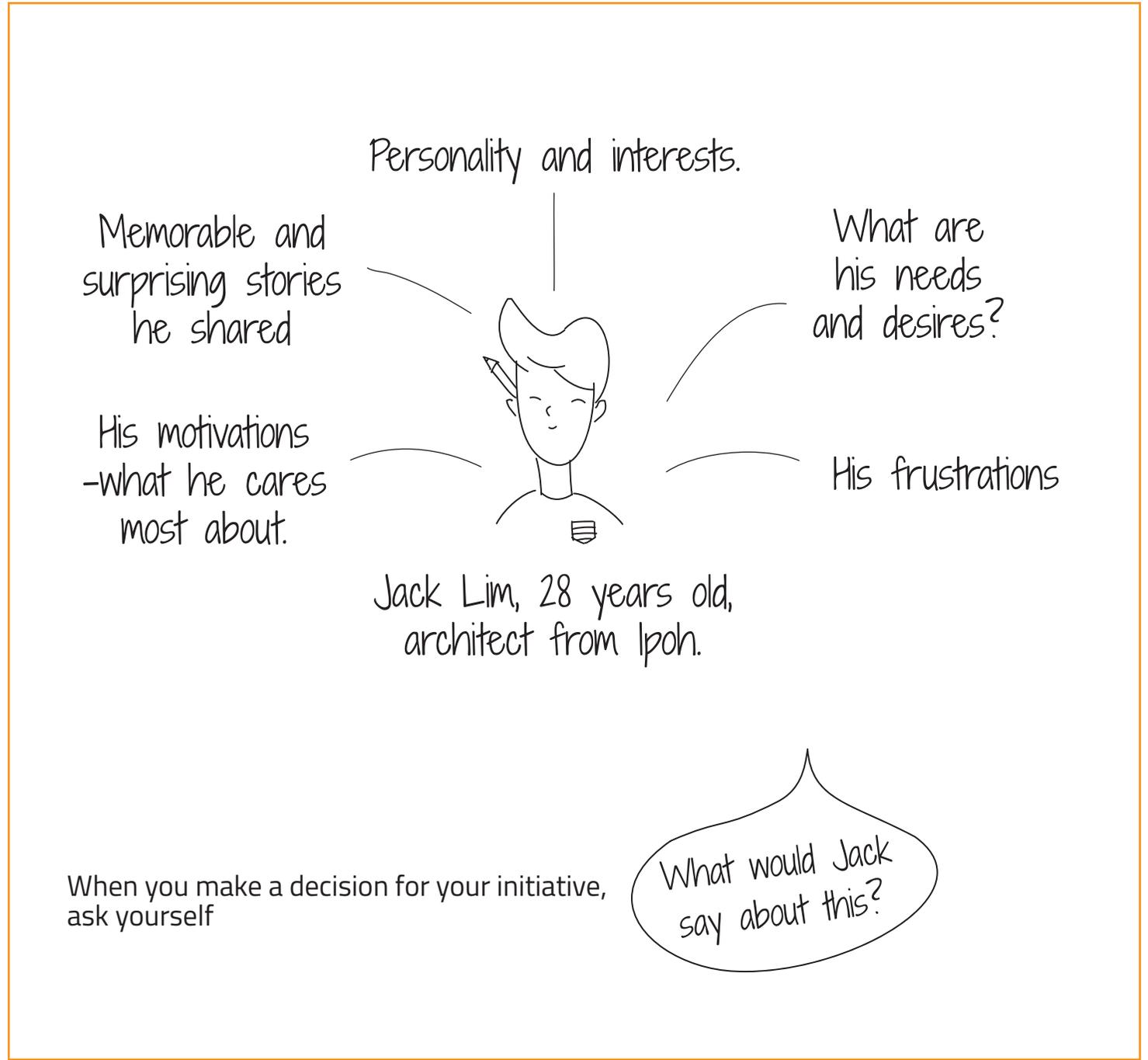
How:

Interview or observe 5 people whom you are trying to help and develop profiles for them. It's good to select people from different backgrounds for a diverse range of perspectives. Use Interview 101 on how to conduct a user-guided conversation.

Where to next?

Try higher engagement tools to understand in depth your user, or move to Challenge unpacked or Abstraction laddering to identify opportunities for ideas.

- ▶ Challenge unpacked
- ▶ Abstraction laddering



USER PROFILING



Name:

Quote:

.....

Photo

What's a short description in quote that you can use to summarise what's important about this person?

An overall description to help us understand this person.

Bio

How old is this person? What's their occupation? Tell more about their family.

*What **motivates** them in life?
What do they care about the most?*

*What **demotivates** them in life?
What are the things that bother them the most?*

*What are their short and long term **dreams**?*

Tip: For user profiles, use names and describe their characteristics in vivid detail. Once you have done their profiles, think about the parts of their personalities or lifestyles that represent wider groups of people.

Case Study:

While redesigning their expansive site for BBCi (BBC's interactive services group), BBC used and built a set of 7 representative characters, in which each character had distinct needs and desires that represent the different segments of BBC's customers. Eventually the site was a success because it was inclusive enough to serve almost every different segment of their target audience.

Similar to the profiles you are about to build, their strength lie in building believable characters, and checking in with them from time to time while making informed design decisions.

CHALLENGE UNPACKED



There are many reasons why a particular social challenge is happening. When you want to understand a particular challenge, this tool helps you understand the issue in broader aspects and narrow down to a particular angle to make your solution more focused.

How:

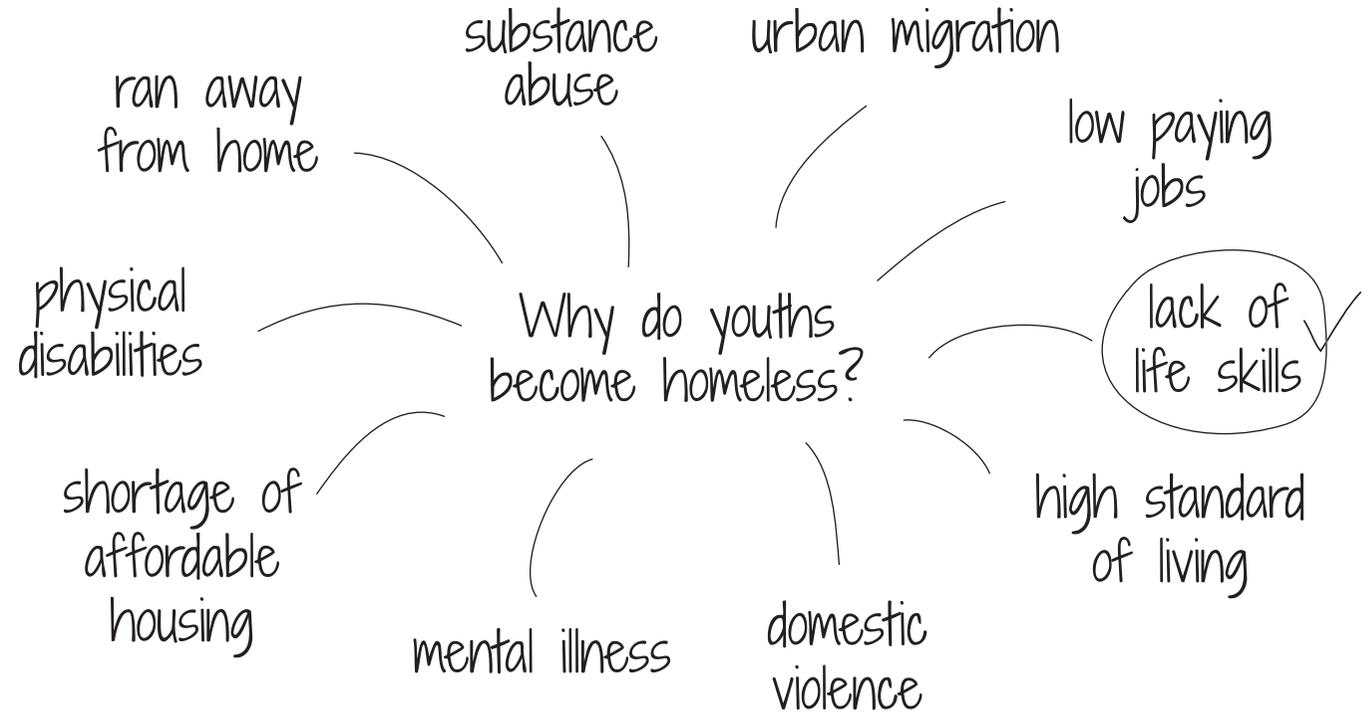
By yourself, or get your team members to list 10 causes behind your selected challenge. Research or discuss and choose one specific cause that you would like to solve.

Where to next?

Try 5 Whys to help you explore the root causes of the challenge, Abstraction laddering to explore opportunities to approach the challenge, or go to Brainstorming techniques to start coming up with ideas.

- ▶ 5 Whys
- ▶ Abstraction laddering
- ▶ Brainstorming techniques

DESIGN SCENARIO: Understanding homeless youth



Out of the many reasons why there are homeless youths in Thailand, the lack of life skills is something you could address. Now you can focus on creating solutions to equip young people with proper life skills.

CHALLENGE UNPACKED



Step 1: Define

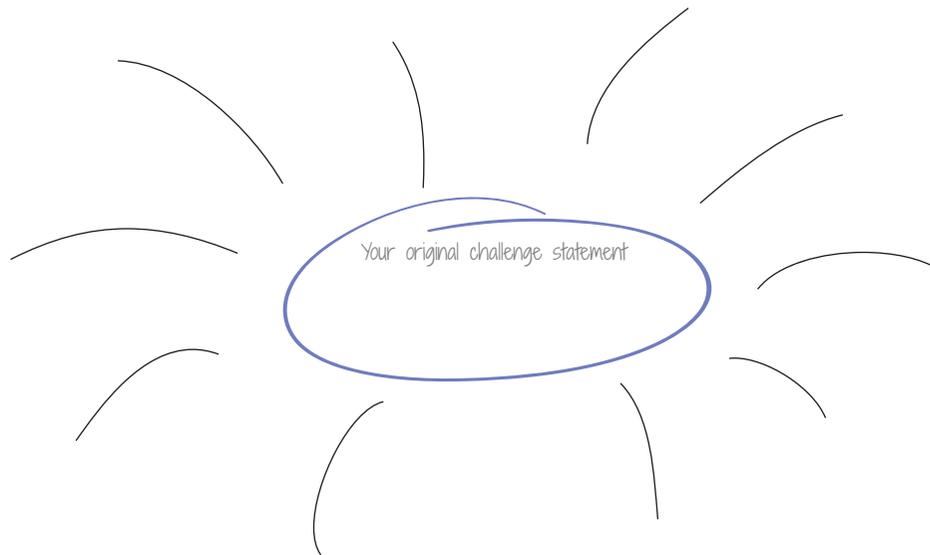
Select a challenge you want to understand and write down a question start with WHY in the middle circle.

Step 2: List

List 10 possible reasons why this challenge has come to be. You may talk to your peers or use additional tools to talk to your user and research around the challenge before listing them down.

Step 3: Select

Select one of causes to be your focused challenge.



Tip: A good and specific challenge needs immediate attention and is within your power to solve with minimal manpower. Think about where can you have the most effect on the challenge for the least amount of work.

Reflection: *Do you have the same level of understanding about each of the 10 listed causes?*

Try exploring to understand more the areas that are less familiar to you, you may find yourself new interests.

Notes:

This tool involve research and unpacking the initial challenge in a way that can bypass the generic perceptions and stereotypes about an issue. Analyzing the unpacked challenges with further immersive and data research can provide you a guidance on which issues can be more prioritized over another.

POINT OF VIEW (POV)

Reference: : Startup Garage by
Stanford Graduate School of Business

A POV is a problem statement articulated using a point of view. It is a phrase that defines the problem you're trying to solve, which will allow you to brainstorm for ideas later in a goal-oriented manner. When you have a great POV, you can understand the needs of your users from a completely new perspective, and start dealing with implicit needs that are hidden under the surface, not the explicit problems that were immediately obvious.

How:

A good POV is specific and focused on your user profile, as if you were building a solution only for him or her. This may seem counterintuitive but crafting a more narrowly focused POV tends to lead to both greater quantity and higher quality solutions when you are generating ideas later.

Where to next?

Try Abstraction laddering to explore different opportunities to approach the challenge. Or try Brainstorming techniques to start coming up with ideas.

- ▶ Abstraction laddering
- ▶ Brainstorming techniques



A point of view has three elements. It describes the user, his or her needs, and the unique insights that explain why his or her need is compelling. Here is an example format:

_____needs _____ because _____
[persona's name/ profile] [1 specific persona's need – verb or phrase]

[what persona wants to accomplish/
how persona wants to feel]

Bad POV: Pam NEEDS to know more about schools BECAUSE she wants to have a better college application.

Better POV: Pam, a last year high school student, NEEDS trusted college application advice and information about schools BECAUSE these needs are not fully met by her high school's guidance counselor, her parents do not have a current understanding of the college admissions process, and she does not know anyone who goes or went to some of the schools she could be interested in applying to.

You can start with a generic POV, then dig deeper and iterate.

For example: Pam NEEDS to know more about schools BECAUSE she wants to have a better college application.

That's very generic, but it's not bad as a starting point because then you can start digging more deeply.

- What do you know about Pam the student that is relevant for the POV that you are creating?
Can you describe her in details?
- What does it mean for her to know more?
Is it because she doesn't have enough time to research, or is it because the information is not available to her?
Why is she not having a good application?
- What aspects of college application do you care about solving for her?
What would be a game-changing opportunity to help her apply for college?

A DAY IN LIFE

This is an engagement tool used to interact with and interview users through short 'intercept' encounters. The best solutions come from the best insights into human behavior. Discover the emotions that drive their behavior to uncover user needs, which they may or may not be aware of.

How:

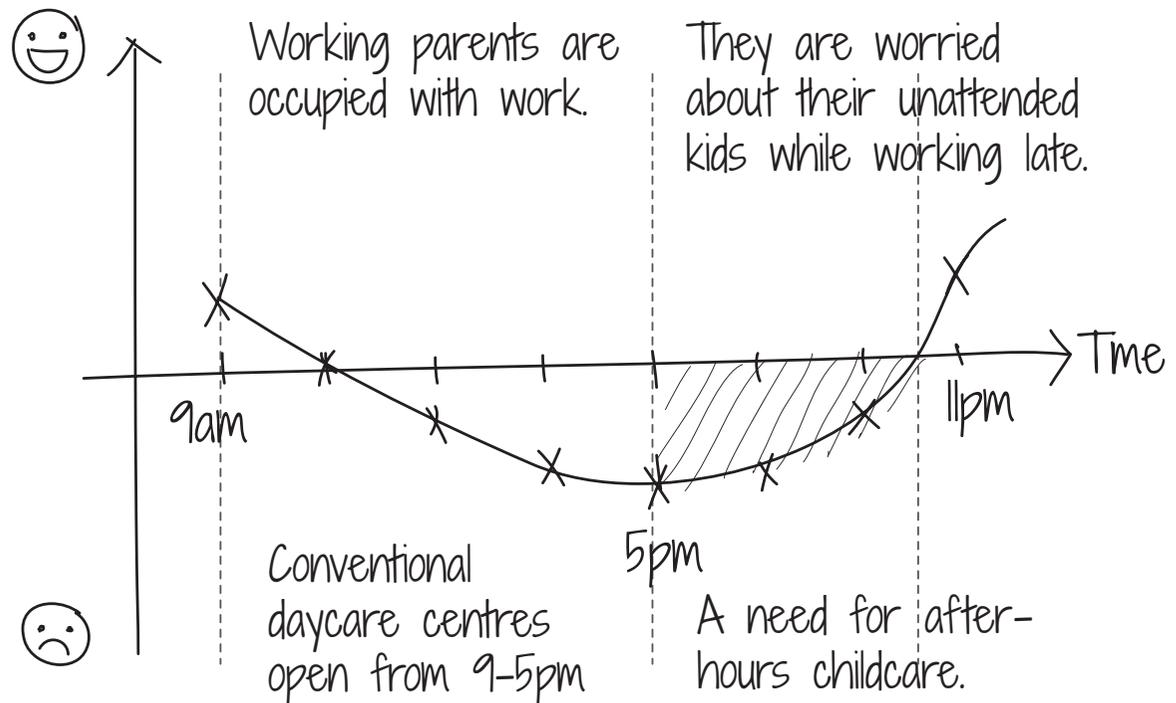
When you interview potential users, ask them to describe their current activities over the course of a day. Get them to record an emotional graph of those activities. Which part of their day is good? Which is bad? Discover why. Use the Interview 101 to conduct a user-guided conversation.

Where to next?

Try other similar tools that you can use together with or as a substitute of this tool in an interview. They allow you to engage and immerse into user's life.

- ▶ I'll follow you
- ▶ Photo diary

DESIGN SCENARIO: Designing a day-care service

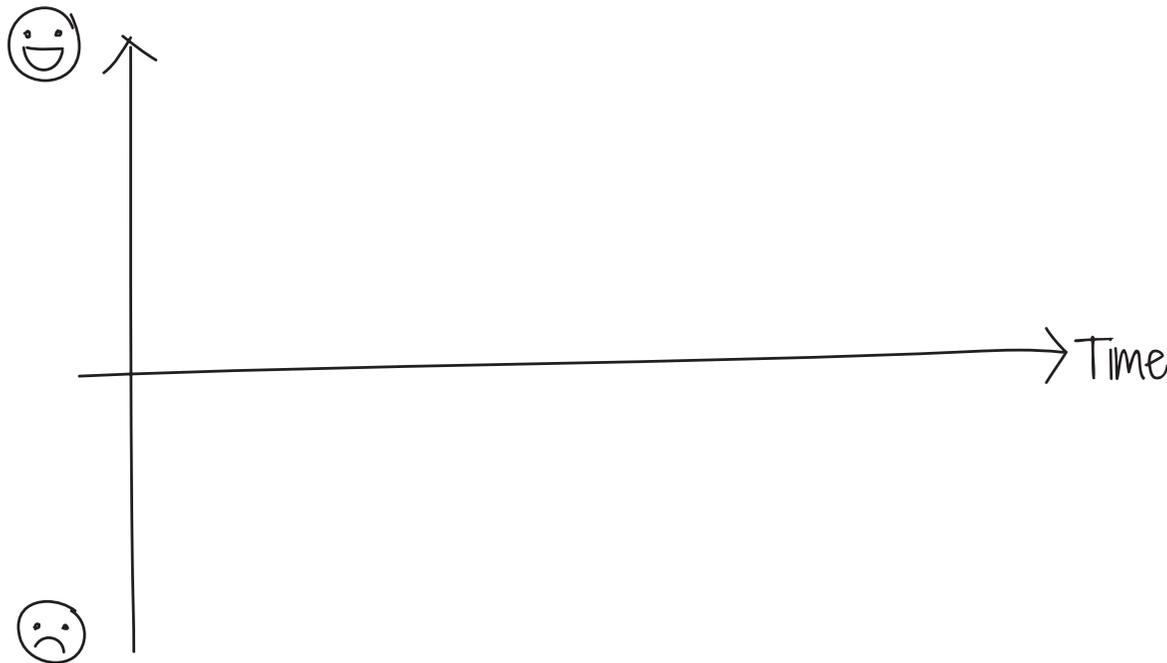
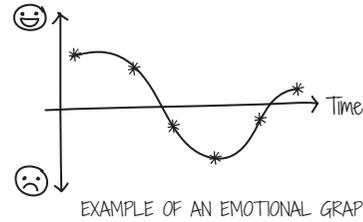


The emotional graph above shows that the working parents were having a bad time throughout the day, and it only got better after 10 p.m. What can you do to close the service gap needed from 5 p.m. to 10 p.m. that is not provided by conventional day-care centres?

A DAY IN LIFE



During interviews, encourage your interviewees to describe aloud their thoughts, emotions, and actions while carrying out an activity that is related to the challenge you're trying to solve.



Tip: During interviews, encourage your interviewees to describe aloud their thoughts, emotions, and actions while carrying out an activity that is related to the challenge you're trying to solve. Encourage participants to share stories, and talk not just about their logical thinking but also emotions. Look out for things that surprise you in the person's routine and dig deeper.

Reflection: *Are there interesting patterns that emerge when you compare this to the days of other people?*

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Notes:

The method is conducted individually with users to capture the typical day data in-depth. If you want to try out-of-the-box thinking, you may also use the understanding of the user's emotions in the current context to draw a prediction of how they would feel through out a day in the future when you have already provide them with an intervention.



I'LL FOLLOW YOU

The objective of this activity is for the researcher to understand the routine and typical activities of a user that the user performs by mere habit and that the user would perform subconsciously. This method elicits the different interaction points of the user and the solution in the context of their life. In this method, individual participants are the representative of the users we are designing for, are followed and observed to understand how they spend their typical day and activities that make up their day.

How:

Follow your potential users by accompanying them and observing their daily routines, interactions with people, and their usual environments. Take notes and make sure you have their permission first. For this method, they are to know of your presence while you're observing them.

Where to next?

A similar tool is Photo diary which you can use as substitute. Try Challenge unpacked to identify opportunities for ideas or POV to craft a statement using your user's perspectives.

- ▶ Photo diary
- ▶ Challenge unpacked
- ▶ POV

GUIDE TO RECORD DETAILS

Write down quotes. This helps you understand not only what they say in the situation but also how they say it.

Make detailed notes about each activities that the user performs. If you can't do that, you might consider recording the session (with the subject's permission).

Photo research. Take pictures of objects, activities, and the surroundings related to the situation you're designing for. This will help you scrutinise the details that you might have otherwise missed. The unusual moments or surprising details that you capture will provide you with insights to your challenge.

Identify touch points, pain points and plus points. A touch point is an interaction between and the user and a system, which can potentially an opportunity to design a alternative intervention. Pain points are areas of discomfort and plus points are moments of joy and delight. Pay extra attention to their frustrations. The frustrating moments are the challenges that you need to solve.

After the day, discuss with the people you are observing about the pleasant and unpleasant experiences they are going through.

DESIGN SCENARIO: Designing a sports gear for disabled athletes.

Try to run or jog beside a few disabled athletes. What is their exercise routine? Do they use any tools or devices while jogging? What do they do when they take a break ? What are the differences between male and female athletes when they exercise? Try to take as many notes as possible in order for you to design the gear.



PHOTO DIARY

A photo diary is a journal of user's day to day life and experiences, created by the user themselves to best capture their own perspectives about the surrounding environment. Diaries and journals tend to be written in a chronological sequence and this also applies to a photo diary, but using pictures alone to record life experiences.

How:

Find a few people who are going to benefit from your solution. Instruct them to keep a photo diary for at least 3 days. Based on the photos, the diary should include their impressions, circumstances, and daily activities or rituals. Understand what they face and feel before designing solutions for them.

Where to next?

Try Challenge unpacked or Abstraction laddering to identify opportunities for ideas or POV to craft a statement using your user's perspectives.

- ▶ Challenge unpacked
- ▶ Abstraction laddering
- ▶ POV

DESIGN SCENARIO: Designing a safety campaign to educate people about the hazards of railway crossings.



Do you understand the lives of the people living near the railway?
What are the things they see or hear first thing in the morning?
What do their kids do nearby the railway?

Ask residents to take as many pictures as possible of their surroundings and the situations before and after the train passes by. Tell them to write their feelings or thoughts about what they've captured in each photo.

PHOTO DIARY



Step 1: Set the context

Find a user who can commit to taking photo diary for a pre-determined short amount of time or over few days.

Step 2: Give instruction

Guide your user to take as much photos as possible of their life's activities and context or of a specific thematic area . Written diary, audio recording and videos are welcome if there are platforms in place to store and share the data.

Step 3: Photo elicitation

After collecting the photos, you can interview the participants using the photos taken by them to elicit information. Use the Interview 101 on how to conduct a user-guided conversation, or use the following prompts such as:

INSTRUCTION PROMPTS

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- Tell me more about this picture.*
- What made you take this photo?*
- What do you like about this photo?*
- What does it mean to you?*
- How did you feel when this photo was taken?*

You may consolidate diaries of different participants to compare what the pictures show and the frequency with which certain elements in the picture recur.

INTERVIEW PROMPTS

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Tip: While reviewing your participants' findings, seek to understand their points of view and not to judge their lifestyles or habits.

Notes:
This method combined with interviewing is particularly useful in obtaining rich subjective data, as different layers of meaning can be discovered such as emotions, memories, and ideas. It brings together the interviewee's images and words and thereby gives multiple dimensions to his or her perspective.

You can also combine this method with I'll follow you activity to both hear and see evidence of users' behaviors, preferences, and needs.

5 WHYS



Five Whys is an iterative interrogative technique used to explore the cause-and-effect relationships underlying a particular problem. We use 5 Whys to look below the surface of a challenge and determine the root cause of a defect or problem by repeating the question "Why?" By exploring different layers of deep insights you can understand the underlying needs of users and different routes for opportunities and ideas.

How:

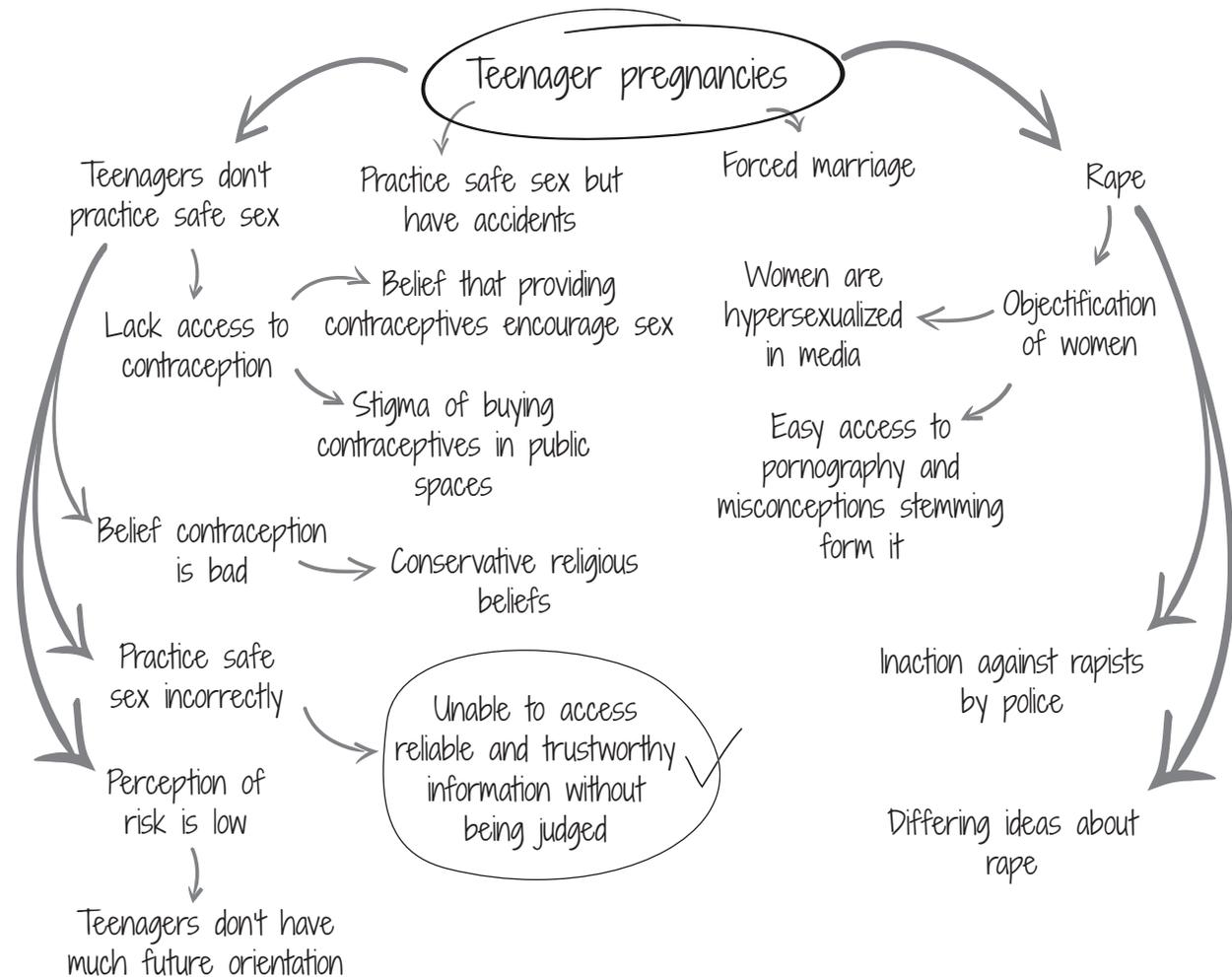
This is a great technique to use during interviews. Keep asking your interviewees why do they do something to discover underlying causes and to get to the root of the issue. Usually five whys will get you there. Use the Interview 101 to conduct a user-guided conversation.

Where to next?

5 Whys is a great way to flare up POV. Try POV to craft a problem statement using your user's perspectives, or Abstraction laddering to explore opportunities to approach the challenge. You can also move to Brainstorming techniques to start generating new ideas.

- ▶ **POV**
- ▶ **Abstraction laddering**
- ▶ **Brainstorming techniques**

DESIGN SCENARIO: Understanding teenager pregnancies



From 5 Whys we can map out a problem tree. Out of the many reasons why there are teenager pregnancies in Thailand, the lack of reliable and trustworthy information access can be something that you are interested to work on. Now you can focus on creating access to trustworthy sources of information that people can access without being judged.

5 WHYS



Step 1: Find users

Find a potential user for an interview or gather together a team of people who are familiar with the specifics of the design challenge that you're trying to fix to identify the root causes.

Step 2: Define the challenge

If you can, observe the problem in action and write a statement at the top of your page. Leave enough space to add answers to different question "Why".

Step 3: Map the problem tree

Ask "Why" 5 times. Each answer forms the basis of the next question. Search for answers that are grounded in fact and evidence of what actually happen and not assumption or opinion. Choose one of the root cause you would like to focus on solving.

Tip: Vary the way you ask "why" to avoid as coming off as too confrontational. For example, you might try 'How come?' and 'Why do you think that is happening?' as alternatives.

Reflection: *How might you best answer each of the questions "why" with the user's point of view?*

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Notes:

Once you have problem tree, think of opportunities to work on a root cause that is under-addressed, different or inspiring. They are often based on a unique insight that's a little weird or unique that leads to a totally new way of thinking about the problem. The common ways we look at things lead to the common ways we have to solve the problem. Avoid generic and out of control root causes such as not having enough time and investment, human errors, etc.

SERVICE SAFARI

Service Safari is a useful method you can use to empathise with your user and better understand the gaps and opportunities while users are using a service. It's an exploration of a service through the lens of your user. The method captures the real-world experience of a specific service, type of service, or a wider range of services. It could be the experience of opening a new bank account, a eco tourism experience, or going through an ID renewal process.

How:

Usually in teams of two, you'll attempt to use the services yourselves. Immersing yourselves in the service is the key here as it gives you a first hand understanding of what it feels like to be a user; what thoughts, frustrations and concerns users might be having at each stage. You might identify some opportunities that the services missed to serve the users.

Where to next?

Try POV to craft a problem statement using your user's perspectives, or move to Brainstorming techniques to start generating new ideas.

▶ **POV**

▶ **Brainstorming techniques**

DESIGN SCENARIO: Understanding micro financing service



Pan wants to understand how local villagers would apply for a micro finance loan online, so she experience the process by herself. She finds a seminar in her area to attend and find more information.



Pan researches information online to see what are the options.



Pan registers an account on a platform she chooses.



She finds out the terms of agreement are very difficult to understand, and the information in the seminar she joined is not helpful. Due to this she's not sure if the micro finance would be enough to help her start a business.



She calls customer service to experience how they would support a user in this case.



She continue the registration process and experience services of other providers.



Pan reflects to evaluate her experience and feeling interacting with the platform, and decide that she would focus on helping local villagers understand the agreement terms of a micro finance service.

SERVICE SAFARI



Step 1: List possible actions

List out some actions you would take when you first think about a user's need. For example, if you want to walk in a user's shoes and experience their attempts in finding ways to apply for a micro finance loan to start a small business, imagine yourself being that person. What would you do?

Touch points: *What services did you try? What are the touchpoints you encounter for each tools, platforms or services you tried?*

Observations: *What did you observe as you interact with the tools, platforms or services?*

Value propositions: *Review the service: What are some of the interesting value propositions or selling points that attract you, if you are a user? Why? What doesn't attract you as a user? Why?*

Thoughts and feelings: *What are your thoughts and feelings as you interact with the tools, platforms or services? What are your concerns?*

Step 2: Experience what it's like

to do the actions that you have listed. For example, Google about ways to apply, or explore what it is like to get a loan from a local bank's branch. Go through the tools, platforms or services. You may call and enquire about certain services you encounter as well.

Step 3: As you experience it, write down your observation below.

Tip: Don't be afraid of testing out services that you have never tried before. If you want to understand the experience of opening a new bank account, you'll go to the bank and open a new account. If it's to learn about an eco tourism experience, then you'll take a tour and familiarise yourselves with the services and facilities available. If want to to understand the public service of identification, you can go through an ID renewal process. Immersing yourselves in the service is the key here as your goal is to experience it from the user's perspective.

Reflection: *Is there already an alternative existing? Which one would your user prefer and how did they decide between their options?*

Notes:

You can use this tool collaboratively by filling them out together with your users, or assemble them based on your immersive experience with your team and your users. Just make sure you have collected enough detailed information to fill them out.

You can also explore additional areas such as the pre-service and post-serice experience.



ABSTRACTION LADDERING

How do you know if you're focusing on the problem at the right level? Sometimes you can unlock a whole new range of creative ideas by taking a step back from your challenge statement and looking at something broader. Sometimes you might feel like you're boiling the ocean and you need to have a more focused approach to the challenge. Abstraction laddering is a useful tool to explore different versions of your challenge statement by broadening or narrowing its focus

How:

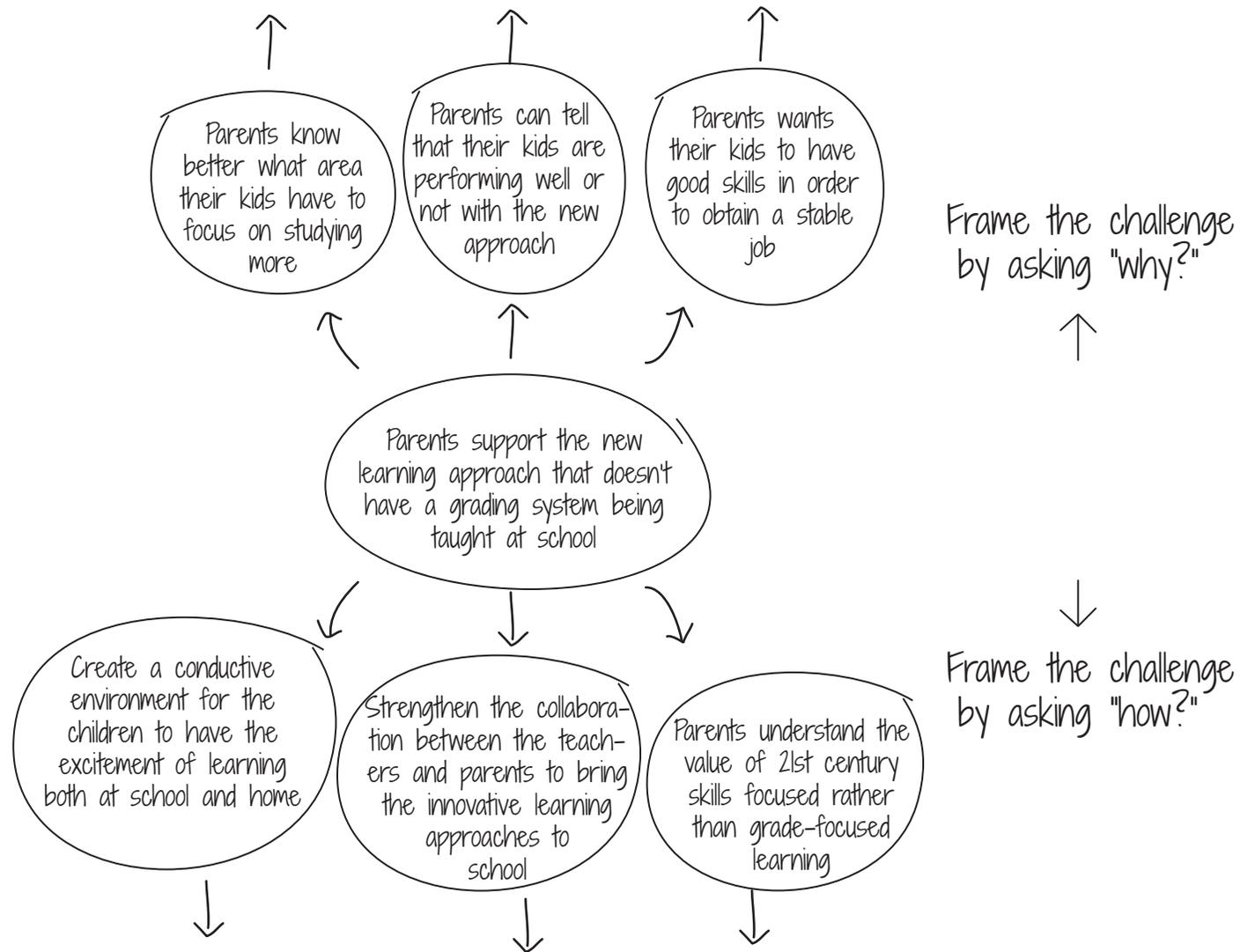
Frame the challenge by both asking "Why" you are interested in solving this challenge and "How" you might do it at multiple levels.

Where to next?

Visit Brainstorming techniques or The 5 Games to start coming up with ideas.

- ▶ Brainstorming techniques
- ▶ The 5 Games

DESIGN SCENARIO: Work with parents to support the implementation of a new teaching approach being taught at school

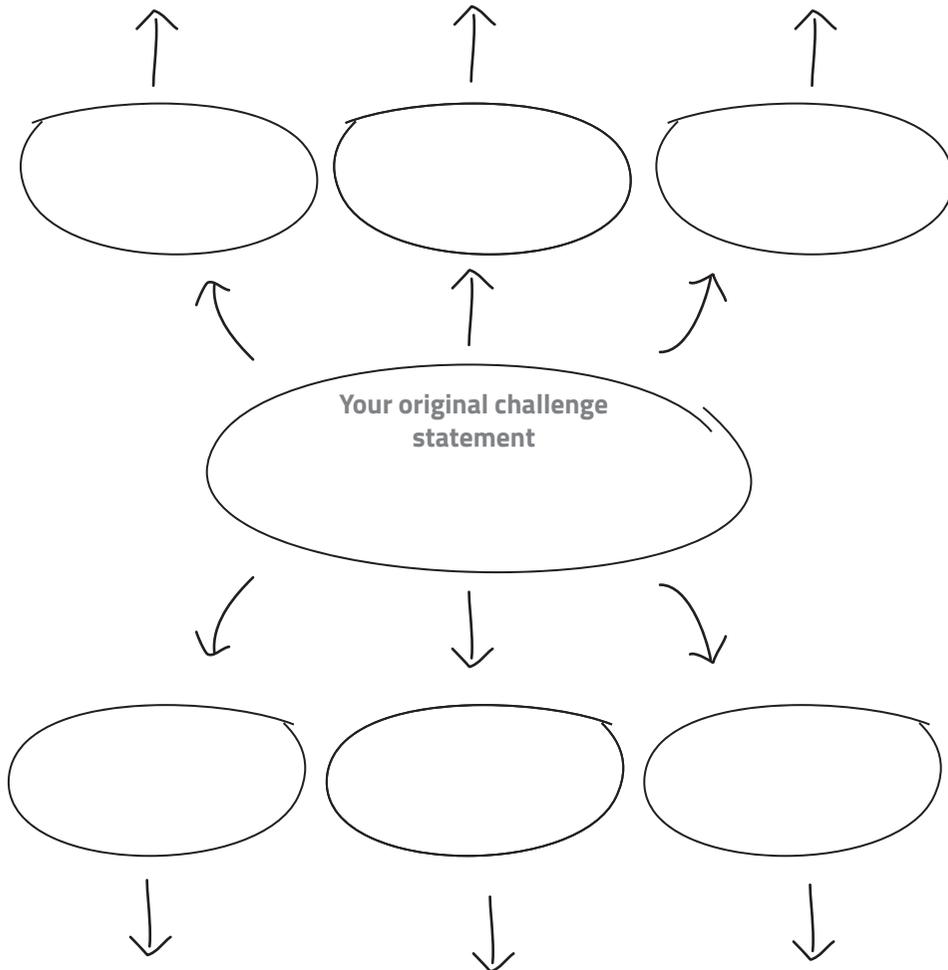


ABSTRACTION LADDERING



Step 1: Define an initial problem statement

Step 2: Explore moving up and moving down with different versions of the challenge statement



Frame the challenge by asking
“why”?
Consider the options that are
broader than the initial one.



Frame the challenge by asking
“how”?
Consider the options that are
narrower than the initial one.

Tip: Discuss with others and decide which option of the problem statement to use for ideation. In the end, the initial statement might be the best.

Reflection:

What are some of the key approaches you might use? Are there approaches beyond the ones you're currently using that might be worth exploring?

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BRAINSTORMING TECHNIQUES

Brainstorming can be used to generate ideas for your challenge statement, but also to solve problems that you're testing. Brainstorming does not occur once in the process. Rather, it recurs at every step of the process because it's a problem solving technique.

How:

Create brainstorming questions and start coming up with as many ideas as possible. Once you have a few potential ideas, you can select one to move forward with.

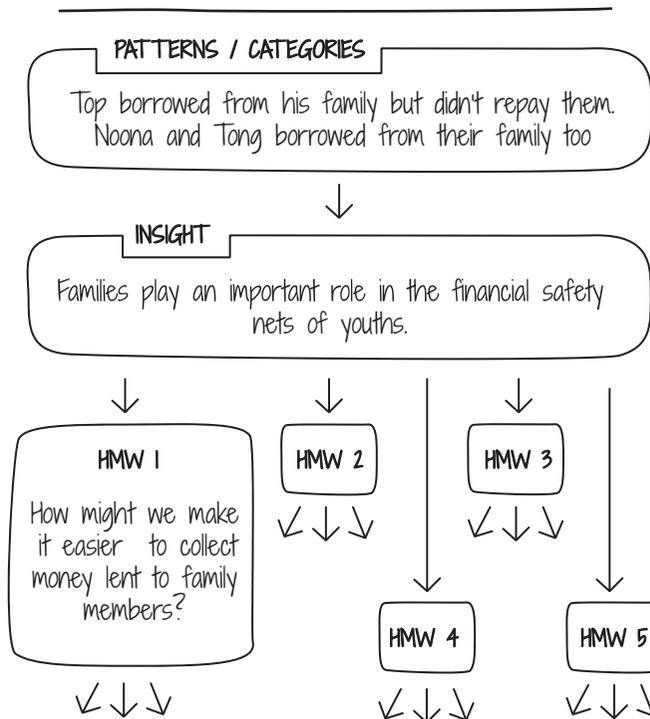
Where to next?

Try the 5 Games to explore different ways of coming up with new ideas, or move to Storyboard to develop your idea in details.

- ▶ The 5 Games
- ▶ Storyboard

Step 1: Create brainstorming questions

Half of a good brainstorm is about having good questions. Create some inspiring and unique questions before you start coming up with ideas. Create several "How might we" questions for each group of observations.



Step 2: Start brainstorming

Check out the brainstorming tips cards before you begin, they will help strengthen your session.

2.1 Brainstorm individually

Start by brainstorming ideas individually. Your team will come up with a larger quality of ideas you can choose from this way.

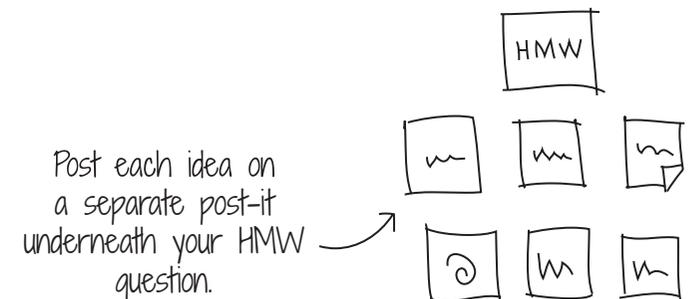
2.2 Push yourself

When you think you've come up with all the ideas you have, push yourself to come up with 10 more! The first ideas you come up with will often be the most obvious.

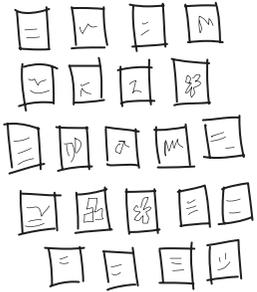
2.3 Brainstorm as 2 groups

Conduct a group brainstorm session to share your ideas for each question and to build on each others' ideas.

Set a short time limit, (e.g. 10 minutes) for each brainstorm question. It might seem too short, but it forces people to think faster and keeps the energy high.



BRAINSTORMING TECHNIQUES



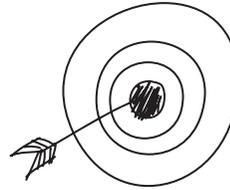
Brainstorming tips:



Big isn't always good.
Small ideas can deliver impact too.

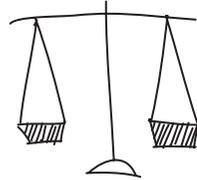


Draw your ideas,
don't just write them!

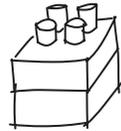


Focus on the challenge.
Brainstorm based on the
HMWs. Avoid discussing
about other topics.

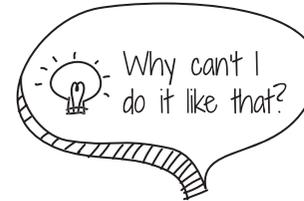
Go for quantity, challenge
yourself to come up with a
large number (20-30) of ideas.



Don't judge. There are
no right or wrong ideas.



Build on ideas.
Improve the original
or someone's ideas.



Different point of view.



Stand up when brainstorming.
Be actively involved.



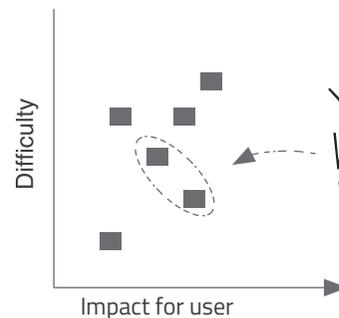
Encourage wild ideas.
Funny ideas are sometimes
the foundation for very
innovative creations.

Step 3: Pick your best idea.

3.1 Start by drawing a horizontal line and label it "Impact for the user". Take the ideas you have in consideration in rank them based on impact for the user.

3.2 Draw a vertical line on the left side and label it "Difficulty". Move your post-its up along the line based on how difficult it is to achieve each idea.

3.3 Draw concentric circles across the matrix to indicate priorities.



Your best ideas are
high impact and
lower difficulty

Tip: It's okay to combine a few related ideas, but avoid combining all your ideas. Favour something simple and bold over something diluted that might draw a "meh" reaction from your users.

Note: Use the Impact/Difficulty matrix to surface the ideas that are really going to make a difference for your users and your organisation.



THE 5 GAMES

This is a set of some more the more advanced brainstorming techniques to help spark inspiration for ideas and refining them.

How:

Choose the most suitable activity for you to create new ideas individually or as a team.

Where to next?

Try Storyboard to develop your idea in details, or move to What-if scenario to start testing your idea with simple technique.

- ▶ Storyboard
- ▶ What-if scenario

GAME 1: RANDOM STIMULATION TECHNIQUE

This game is meant for discovering unknown connections between a challenge and a stimulation.

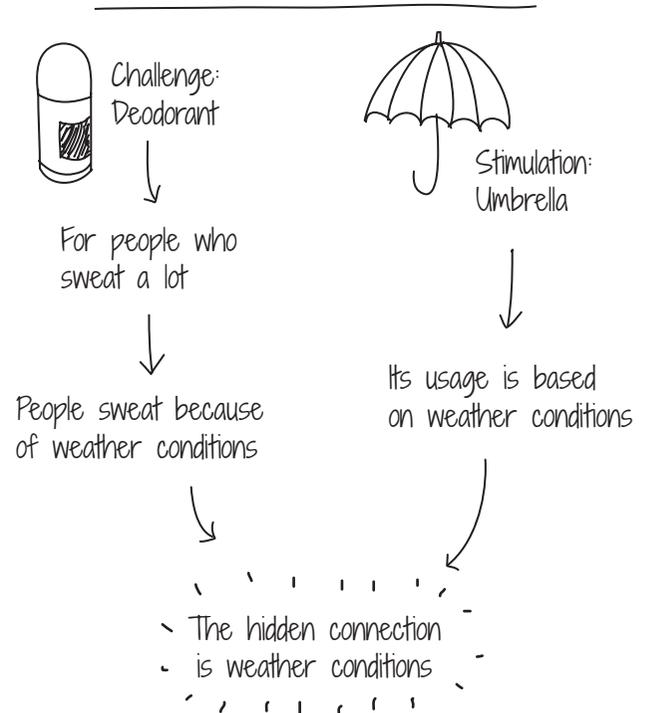
Step 1: Pick a random word, picture or concept by pointing on a random page in a dictionary or book.
e.g. Umbrella

Step 2: Identify the challenge you're trying to solve.
e.g. Create a new kind of deodorant for men.

Step 3: Try to link the random word with your challenge.
e.g. How can umbrellas and deodorants be connected?

Step 4: You will discover hidden connections between the random word and your challenge.

FINDING THE HIDDEN CONNECTION



THE 5 GAMES



GAME 2: REVERSING ASSUMPTIONS

Step 1: List down all of your assumptions about the product or service.

e.g. Restaurants charge money for food.

Step 2: Reverse and question each assumption.

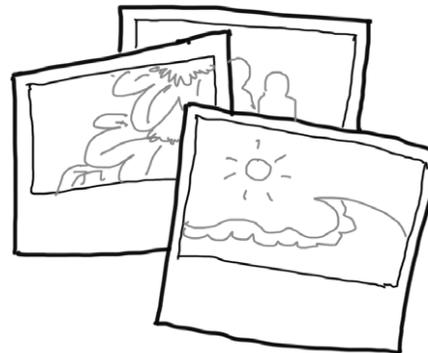
e.g. What if they don't charge?

Step 3: Eventually think about using these new ideas in your challenge.

e.g. Possible business model can be "they don't charge the customers who can advertise the food for them".

CASE STUDY:

One day, on a family vacation, Edwin Land's three year old daughter asked him why she had to wait for the photo, but that question led to the invention of the Polaroid by Land.



For this game to work, you'll need to spend time seriously considering some wild-sounding questions.

↖ Its not about violating the rules. Its about being unconventional and exploring new approaches.



THE 5 GAMES

GAME 3: IMPOSE CONSTRAINTS

Setting up extreme constraints to prompt new ways of thinking about the problem:

"What if it had to cost more than a million dollars to implement?"

"What if it had to be free?"

"What if it was physically larger than this room?" "Smaller than a deck of cards?"

"Had no physical presence?"

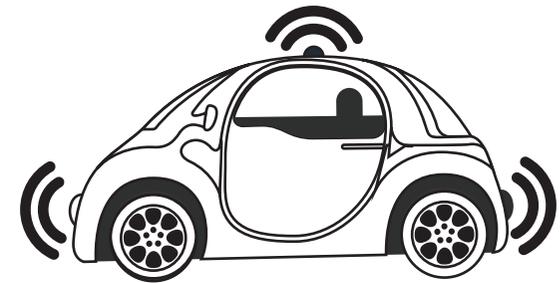
"Took more than three hours to complete the experience?"

"Less than 30 seconds?"

"What if it had to be 100 times better than the current solution?"

CASE STUDY:

When Google was thinking about designing a better transport experience, they thought about how they could make it 100x better than the current approach. If they had just thought about how to make it incrementally better, they knew they would come up with many of the same ideas companies were already coming up with, like improvements in fuel efficiency. This question led Google to develop the self-driving car.



THE 5 GAMES

GAME 4: ANALOGOUS BRAINSTORMING

Step 1: list what attribute of your design challenge you'd like to research further

Step 2: brainstorm other situations, industries or activities that are different but might share the same attribute

Step 3: Observe a space and interview people in analogous situations: find out what other people do to serve the needs of the same attribute

Step 4: Use others' situation to be your inspiration, brainstorm how you will turn it to a solution that suit your context

Case study:

When Christi Zuber at Kaiser Permanente wanted to find an innovative solution for nurse medication rounds, she and her team looked for analogies. One attribute they noted was that nurses needed 100% concentration on their task during medication rounds but are required to multitask at other times. The role of airplane pilots struck them as an analogy. Take off and landing are crucial moments, but the pilot's role during the rest of the flight is often less demanding. When they visited an airline crew, Christi and her team learned about what pilot do and come up with solution for the nurse medication rounds.

Attribute of your design challenge

completed focus on high stakes task

Nurse need 100% concentration during medication rounds, while running around multitask at other time

Analogous situations that share the same attribute

pilot when take-off and landing

Pilot need complete focus during takeoff and landing, the rest of the flight is less demanding

Inspiration from analogous situation

"the sterile cockpit" during take off and landing

A time period when no one can speak except the pilot and co-pilot, and must be about takeoff or landing only.

solution that suit your context

Nurse wear "sterile sashes" during medication rounds

Indicated they should not be bothered unless the conversation was about the medication task at hand

THE 5 GAMES

Reference: *Sprint* by
J Knapp, 2016

Individual and silent brainstorming is proven not only to help teams come up with more ideas – but also a wider diversity of them. One of our favourite tools for this is the four-step sketch.

How:

Create brainstorming questions and start coming up with as many ideas as possible. Once you have a few potential ideas, you can select one to move forward with.

Where to next?

Try Storyboard to develop your idea in details.

► [Storyboard](#)

GAME 5: SILENT BRAINSTORMING

Step 1: Notes

We find one of the most useful ways to start ideating is by taking a little time to “boot up” and gather notes on your research data, opportunities, and inspirations that have been collected around the room.

Step 2: Ideas

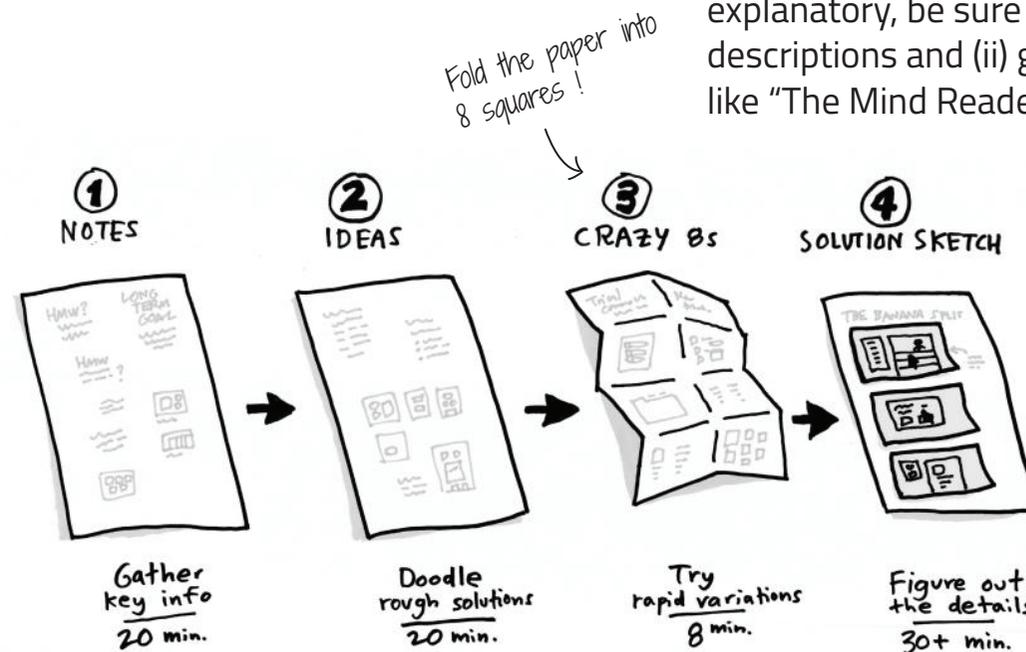
Put together a few rough ideas.

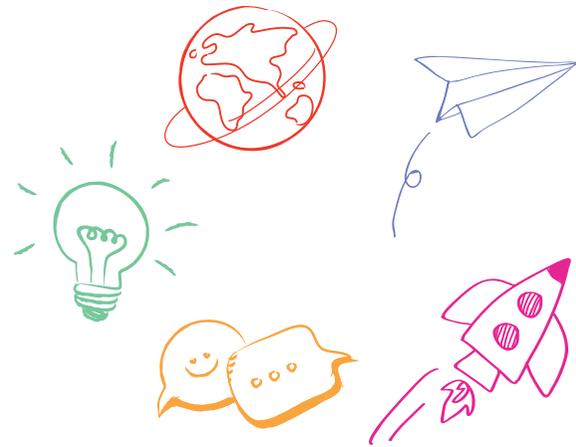
Step 3: Crazy 8s

Folder your paper into 8 and quickly try 8 variations of your idea, one minute each. Take your favourite piece from idea sheet and think “what would be another way to do this?”

Step 4: Solution Sketch

Finally, put together a detailed solution sketch and figure out the details. Keep these things in mind: (i) to make it self-explanatory, be sure to include descriptions and (ii) give it a catchy title like “The Mind Reader”.





STORY BOARD

Storyboards are a great tool to make a set of interactions (or also called “touchpoints”) with a problem or a solution real and understandable. You can use storyboards to clarify a process to yourself and to make sure everyone understand what happens at each step.

How:

Taking it beyond words and illustrating it makes storyboards a powerful tool to communicate a problem or a solution. In this case, we’re going to build a storyboard to help us understand the whole user journey – and find potential risks in the intervention.

Where to next?

Try Write a blurb or Paper prototyping to start testing your idea with simple technique.

- ▶ Write a blurb
- ▶ Rapid prototyping

INITIAL SITUATION



Linda fetches water from a borehole that is too far away from her home for daily use. The local water makes her and her family periodically sick.

ENTICE



Linda hears about a new water treatment centre from neighbours called “Naandi”. The centre is close to her home and is affordable at 10 bath for 5 gallons.

ENTER



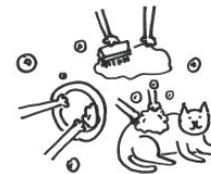
One day, she walks to the facility and is required to buy a monthly punch card for 5 gallons water a day.

ENGAGE



She can’t carry the 5- gallon Jerri can that the facility requires her to use because it is too heavy. She waits for her husband to come back from work in the evening to fetch the water by bike.

EXIT



The whole family uses the water for drinking and washing but they only use 3 gallons of water a day. Linda plans to use the water from the Naandi treatment center until she finishes the monthly punch card.

EXTEND



She will not purchase one for the following month because she has to pay for more than she needs.

STORY BOARD



Illustrate how it works

Keep this as visual as possible. Use coloured pencils to bring attention some of the key things you want to highlight.

1. Initial Situation

What happens at the beginning of the scenario?

2. Entice

How are they drawn to the intervention?

3. Enter

What triggers the first use?

4. Engage

What happens the first using it? After that?

5. Exit

How does the experience end?

6. Extend

Does the person come back and use it? What happens afterwards?

Tip: To identify risks to prototype and test, we ask ourselves at each step “what could go wrong here that would cause the product/ service/ intervention to fail?”

Notes:

Each step in the storyboard represents a different touch point the intervention has with the user. The interaction is described step by step in a storyboard/classical blueprint.

The storyboard example given in this playbook is a fictional journey based on insights about challenges the Naandi Foundation, which provides clean and safe drinking water in India, initially faced in reaching out to underserved community members.

CASE STUDY:

Story boarding was invented by Walt Disney. Disney used this technique to mark up his animated stories by first developing a series of sketches that outlined the main part of the story. As the plot evolved, the sketches would become more elaborate. Early storyboards only outline the shapes and movements of the main characters, but as the development progresses, they include colors, shapes, three dimensional features, elaborate movement, and so on. The same technique can be used to illustrate your new ideas.

WRITE A BLURB

Reference: *The Collective Action Toolkit* by Frog Design

You don't know if an idea will work until you try to make it something real. This will help you test ideas in a creative and fun ways by telling stories.

How:

Craft a simple story that explains to other people why your idea is relevant, then practice sharing it with others.

Where to next?

Try What-if scenario or Paper prototyping to start testing your idea in a similarly creative and engaging way.

- ▶ **What-if scenario**
- ▶ **Rapid prototyping**

The 5 "S" of blurb writing

Simple: Keeping in mind the vast readership that your book will target, it is always best to keep your blurb as simple as possible. Long and convoluted sentences, jargon, specialized terminology - all make the blurb appear complicated and limit the readership. Write in local language of the user if you can.

Short: A short, crisp blurb that says a lot in a few words should be sufficient to pique the interest of a reader

Samples: Look at as many blurb samples as you can. Related news articles, reports and tweets are rich samples base to explore.

Story: Even in the case of non-fiction titles, a good story connects with the audience instantly. Does your blurb tell a story? Will it make the people want to know more about your idea?

Selling points: What is it that the audience would want to know? How can my blurb add to the understanding of existing idea? What makes my blurb story different? Who am I communicate this to?

By answering these few questions, you can gain more clarity about your work, and will know what exactly to include in a blurb.



CASE STUDY:

It's working! The "Great Pacific Garbage Patch" cleanup is now finally catching micro plastic in the ocean, from one-ton ghost nets to tiny microplastics without interfering with marine life. The self-contained system uses natural currents of the sea to passively collect plastic debris in an effort to reduce waste in the ocean.

WRITE A BLURB



Step 1: Select an idea you would like to work on. You can ask your teammates to do the same for the same idea, or each person would focus on a different idea.

Step 2: Discuss and write down

- *What the idea is and who will use it?*
- *How it will change the community?*
- *Why it will help the community?*
- *When and where it will be used?*

Step 3: Be a journalist

Write a one-by-one sentence description about why the idea is great. You or your team should spend at least 20 minutes writing a paragraph telling the story of the idea.

Adjust the tone of your story by pretending to be journalists, politicians, teachers, and so forth. Imagine if your blurb would be published in the media, a magazine, at a billboard, how would it sound and feel like? You can write multiple versions of blurb and combine the best parts to improve the story with each iteration.

Step 4: Share your story

Gather your team, peers and colleague, or a group of users and talk about the elements that stood out. Write down what worked and what could be improved in each story.

Discussion notes:

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The blurb story:

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Feedback from others:

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Tip: A good blurb convey a good story that would connects with the intended audience instantly. Tell it from the user's point of view as in a way that reflect their characters and context.

Reflection: *Does your blurb tell a story? Will it make the readers want to know more? Does it reflect the game-changing key element of your idea?*

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Notes:

Someone said they weren't interested in what you had to offer? You can still learn a lot from them!

Ask them about other challenges they might have related to the topic you're working on. One startup first tried – and failed – to set up a dating service for dog owners. Then they heard feedback from some of the dog owners they were talking to that they had trouble scheduling play dates for their dogs. They then changed their narrative to scheduling their dog for a play date and it was a hit!

RAPID PROTOTYPING

Prototyping gets ideas out of your head and into the world and learn quickly about the idea. A prototype can be anything that takes a physical form—a wall of post-its, a role-playing activity, an object. Prototypes are most successful when people (your team, users, and others) can experience and interact with them. They're also a great way to start a conversation.

How:

Build the prototype of your product in a short time. Give yourself a short time to work on the prototype (1/2 - 1 hour), as time limitation helps in thinking creatively and effectively. After you're done, test out your prototype on yourself or with potential users. Ask for feedback to improve on your prototype.

Where to next?

Try What-if scenario, Wizard of Oz, or MVP to try different ways of building a prototype and design a test.

- ▶ What-if scenario
- ▶ Wizard of Oz
- ▶ MVP

Step 1: Identify what to test

Before jumping into prototyping, you will want to start by identifying some potential questions you might want answered about your project before launching it. One question you could brainstorm is: "What might cause my idea to fail?"

Review your idea.

Write down all the uncertainties or things that might not work as questions. For example:

Uncertainty:

Parents might not want to switch from their existing water source to a new one.

Question for testing:

Can we convince parents to switch from their existing source of water to ours?

Do parents actually have trouble getting clean drinking water?

Will parents be able to afford the service?

Step 2: Pick the question you need to answer first. There are the issues that could require that you rethink your idea.

What is the first question you would like to have answered?

Do parents actually have trouble getting clean drinking water?

Interview parents:
Is this a problem that they've encountered?
How are they solving it?

5 out of 10 parents we interview say this is an unsolved problem

What will you prototype? What is the experiment you will run?

How would you measure the results of your test?

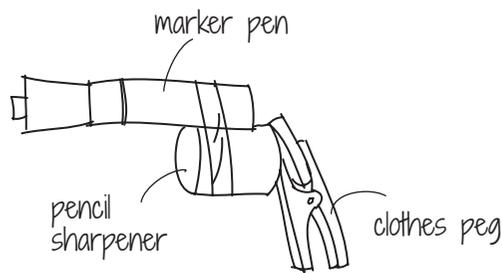
RAPID PROTOTYPING



Step 3: Sketch out the prototype to get a better idea of how it's going to look like. Go out and collect cool stuff that might be useful for you to build your prototype. Make sure that the space for prototyping is big enough for you and your team.

CASE STUDY:

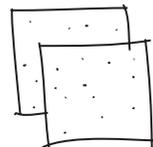
While redesigning a medical tool, IDEO's design team built a quick prototype while talking to surgeons and doctors. Their prototype consisted of a marker pen, a pencil sharpener, and a clothes peg taped together.



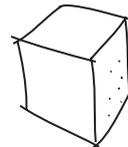
In rapid prototyping, you use the limited resources in hand to build your prototype in a short time.

Not designing a physical product? Draw the process to tell the story about the service you're designing. Try Write a blurb or Storyboard to design your test.

SOME USEFUL PROTOTYPING MATERIALS



1. Cardboard



2. Foam blocks



3. Role-playing props



4. Furniture



5. Modelling clay



6. Newspaper



7. Strings, wires, masking tape



8. Plastic bags



9. Satay sticks

Tip: Gather some potential prototyping materials before the exercise starts. These can be new or recycled items. There are also plenty of resources online where you can get templates for free.

Notes:

Start with problem testing: test whether the specific user group you picked out actually faces the problem you want to solve.

Wondering how to set your success criterion? It's up to you but the rule of thumb is that for broad markets you'll want to have low success criteria (1 out of 100 rural women) and for narrow ones, you'll have to have high success criteria (5 out of 10 rural women with children in a particular school).

“WHAT-IF” SCENARIOS

The goal of coming up with different scenarios is to test how your creation can solve a challenge in different situations. This will help you see the pros and cons of your product or service when it is put into actual practice.

How:

When you want to test your prototype, illustrate a story with several plots and different characters in order to explain how the product or service can be used. You can create the scenarios through drawings, sketches, or role-playing.

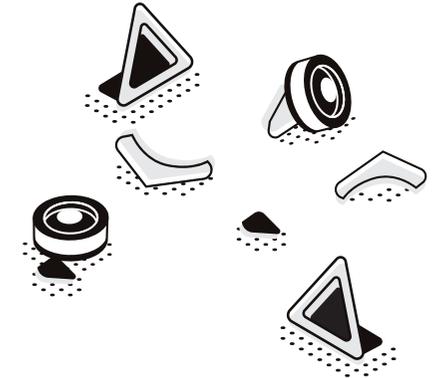
Where to next?

Try Wizard of Oz if you have a technology intervention, or MVP to bring your prototype to the next level.

- ▶ **Wizard of Oz**
- ▶ **MVP**

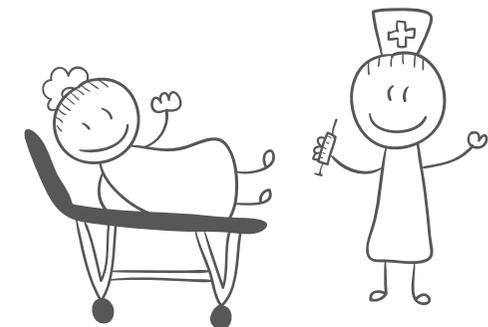
DESIGN SCENARIO: Invent new airbags for cars.

Try creating different scenarios for a car accident and illustrate how your newly-designed airbag would work in those context. What if there were three passengers in the car? What if there was a baby in the front seat?



CASE STUDY:

A group of designers created a new patient registration system for a hospital. While presenting the concept to the hospital’s management, every team member took a role to act out the improved timing and the new user-friendly features of the system while managers acted as patients in different simulations of the new system. This was a good way for the hospital management to review the newly improved system and to better understand how it works as a whole.



“WHAT-IF” SCENARIOS



Step 1: Ask “What-if”

Imagine possible scenarios around using your product or services by using the question “What if”. Alternate different variables around your product or service so that you don’t need to create all facets of a complex solution but to test different options.

Step 2: Create the scenarios

You can create the scenarios through drawings, sketches, or role-playing. Think of different users who may be involved in the scenario, how they would decide or behave, what can be the context? Choose a creation style that can present as much as possible the scenarios.

Create the “scene” that you want to test in, or at the very least, recreate in your own space.

While your team members are presenting or acting out the scenario, look out for potential problems and areas of delight from their act. Repeat this process in order to improve your prototype and to eliminate possible pain points.

What-if scenarios:

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- *Where should a user ideally encounter your concept?*
- *What props do you need to build?*
- *What roles do you need to play?*
- *How are you going to source and host users?*

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Feedback from iterations:

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Tip: Find some fun props to help you create the scenarios. Keep it as low resolution as possible. For example: A paper plate as a steering wheel for a bus driver role when role-playing.

Notes:

Be mindful of the interactions that take place as you test your scenario. Pay attention to what makes the users happy and frustrated.

If you test out the scenarios with users, remember your goal is not to integrate their ideas into your design, but to better understand their thinking and reveal undetected needs and insights.

If you are sketching out the scenarios, discuss the flow of the story and identify the things that don’t work well. Then go back and improve on your prototype.

WIZARD OF OZ

Wizard of Oz prototypes often refer to prototypes of digital systems, in which the user thinks the response is computer-driven, when in fact it's human-controlled. This prototyping method is suitable for designing products or services that require a lot of physical interaction with their users.

How:

Suppose you need to quickly prototype a technology. You can use a person to simulate or act out how that technology might work, such as how a computer or a machine would play in real life, to find out what the experience would be like. For digital prototypes, you begin with a series of paper mockups and the user interacts with these paper mockups.

Where to next?

Try MVP to explore different types of prototyping or move to Feedback capturing to consolidate data from your tests.

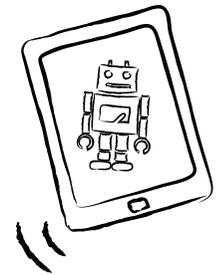
▶ MVP

▶ Feedback capturing

DESIGN SCENARIO: Design an app to encourage healthy eating habits

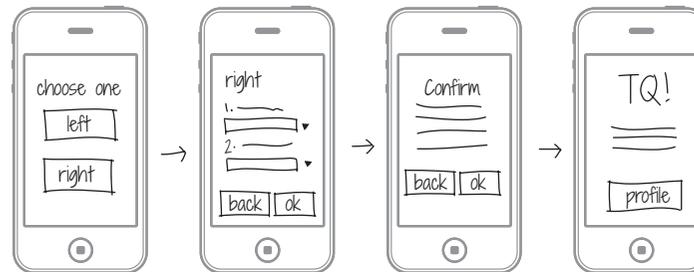
Test 1:

A design team would like to test, if by sending daily eating reminders at a specific time through out a month to the user's phone, they would actually become more conscious of their food choices and change their eating habits to be healthy. The team wrote down a list of reminder options that the user can choose, such as at what time and how many times per day they will be reminded for the user to choose. Instead of writing code to send the notifications, the team sent whatsapp messages to the user over the course of one month to check if the reminders actually helpful.



Test 2:

The team wants to create a mockup for the app. They can do this by drawing each "screen" users encounter on the app using a paper template, and placing it in front of users and allow them to "click" through. When a user taps on a part of the page that leads them to another page, the team places that new page in front of them.



WIZARD OF OZ



Step 1: Determine what to test

Determine what functionality you want to test, and figure out how to fake that functionality and still give users an authentic experience.

Step 2: Create the illusion

You can combine existing tools (such as paper screens, tablets, email systems, Powerpoint) with human intervention to create the illusion of functionality.

Step 3: Write down observations and feedback

You can talk to the user briefly before interacting with the prototype and at the end of the interaction to get feedback. But you should refrain from talking while the user interacts with the prototype. This is so that you don't bias the user's reaction to have a faithful representation of what user's interaction would actually look like.

Pay close attention to whether users are interacting on places that cannot be touched and whether they understand what the technology is about; without any verbal explanation or prodding from you. Improve and fix functions that most users find unuseful or confusing.

Which functionalities do you want to test?

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How would you create the illusion of technology?

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Feedback from iterations:

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Tip: While creating the illusion, you can have someone hiding in the background to play the part of a machine that is carrying out some tasks.

Notes:

Wizard of Oz prototypes can be extended beyond the digital realm, to physical prototypes. You could prototype a vending machine without building the mechanics behind it—using a person hidden inside to switch screens, deliver purchases, collect cash and mimic other aspects of the experience.



MVP (MINIMALLY VIABLE PRODUCT)

As your prototypes become more fully developed, you will need to start asking the following question: “Can I actually build a commercially viable product around this prototype?” You will answer this question by developing and testing an MVP that has just those features that allow the product to be tested and generate data and insights about the fit between the user and the product and about the business model for the product.

How:

Early-stage teams usually rely on three distinct MVP strategies: using surveys and emails, using Wizard of Oz, or using Concierge MVP.

Where to next?

Try Feedback capture matrix to further improve your prototypes, or move to Social Business Model Canvas to build a business model from your product.

▶ **Feedback capturing**

▶ **Impact Business Model Canvas**

STRATEGY 1: SURVEYS AND EMAILS

Basic surveys and emails can test very simple hypotheses for user behavior. Will the user be willing to perform very simple tasks? Will they be willing to share a link and create virality? Will they be willing to provide us with some useful information?

Because of their simplicity, surveys are easy to implement. However, as a survey is a one-time interaction, the underlying user engagement does not translate to repeated behavior.

DESIGN SCENARIO: Redesign the online shopping experience for second hand clothes

An insight found that women in their 40s and 50s were particularly unhappy with the selection they found in their local secondhand shops. The team discovered that there was a wide variety of good options online, but these options were dispersed among a multitude of sites. Their hypothesis was that examples of used clothing would provide these women with the choices they needed. Thus, the team started by creating a database of 200 potential leads, people with an active interest in secondhand clothes. The team first sent an email blast to the list in an effort to introduce the concept. They then followed up with an email and then a Google Doc order form to ask for specific orders (which is not a real form but more of an express of interest). They found out that the ability to try on and test clothes were critical to customer adoption.

STRATEGY 2: WIZARD OF OZ MVP

You can create mockups of both physical and digital solutions using Wizard of Oz, which is explained in details as a separate tool in this playbook.

STRATEGY 3: CONCIERGE MVP

Simplify the product by replacing automated components with humans. You might imagine a powerful web app that gives users a smooth onboarding experience, gives them smart recommendations about what to do, follows up with nice personalized emails, and automates a high level of support. You can actually skip most of the product building and be directly in touch with your early customers by manually delivering the tasks.

CASE STUDY:

In the book Lean Startup, Eric Ries uses the anecdote of Food on the Table, a grocery shopping service that figures out what you like eating, then compiles the shopping list at specific stores that will save you the most money. Their concierge MVP involved the founder personally scrounging coupons and compiling shopping lists for their early customers.

FEEDBACK CAPTURING

Use a feedback capture grid to facilitate real-time capture, or post-mortem unpacking, of feedback on presentations and prototypes – times when presenter-critiquer interaction is anticipated. Using a capturing grid will help you be systematic about feedback, and more intentional about capturing thoughts

How:

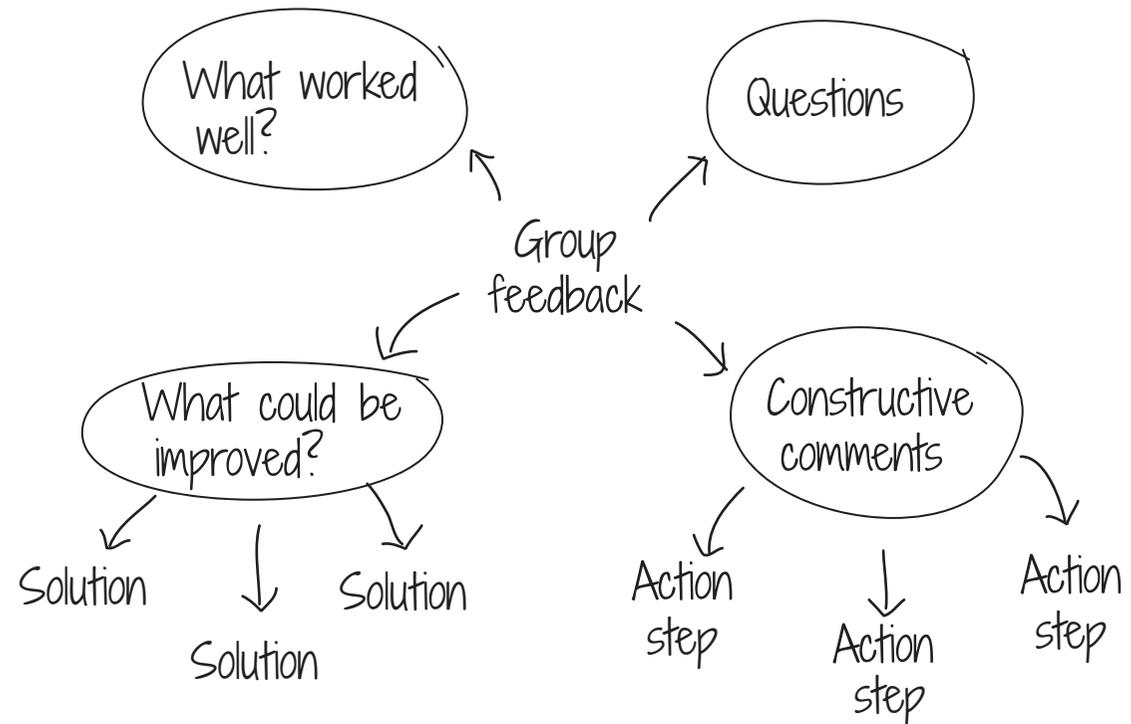
The grid arranges thoughts and ideas into four categories for easy assessment. You can use a feedback capture matrix either to give feedback on progress within the design team or to capture user feedback.

Where to next?

Try Social Business Model Canvas to build a business model from your product.

► [Impact Business Model Canvas](#)

HOW TO IMPROVE ON FEEDBACK



FEEDBACK CAPTURING

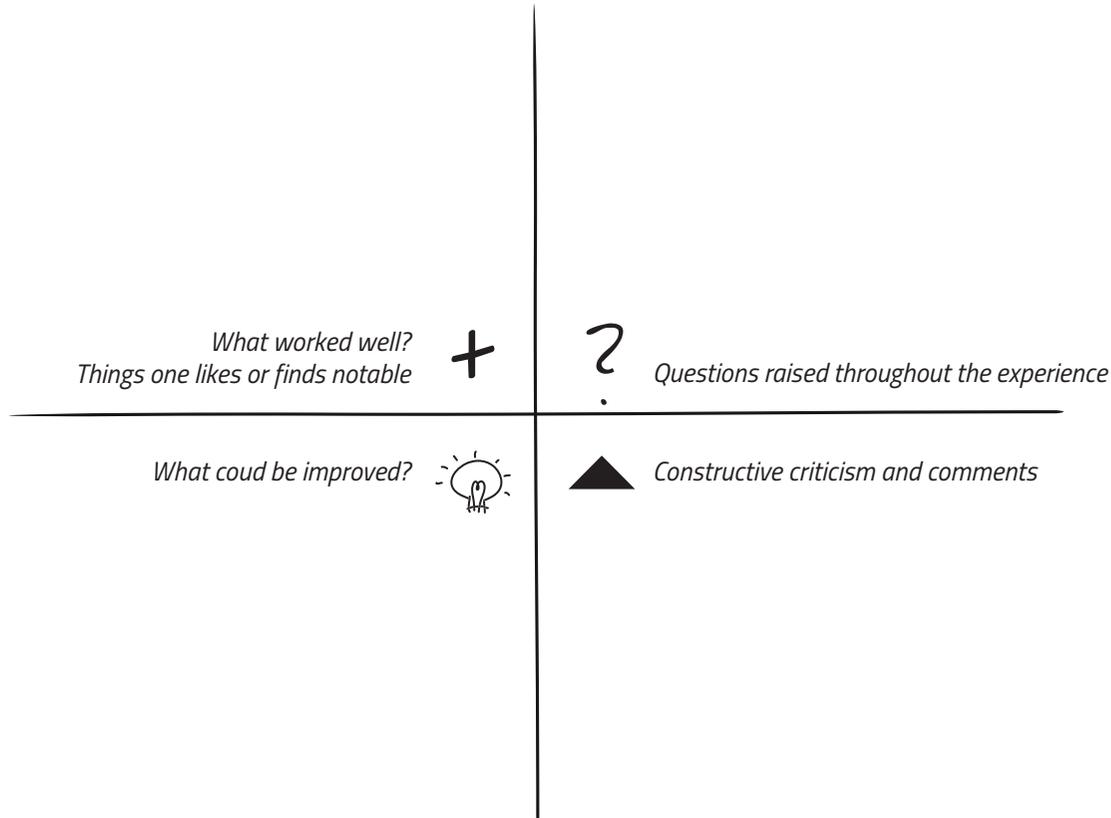


Step 1: Categorise feedback

Group them accordingly to themes of what worked well, what could be improved, questions, and constructive comments.

Step 2: Make it better

Come up with solutions for negative comments and action steps for constructive comments.



Ideas for improvements:

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Action steps:

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Tip: Constructive comments are useful comments you can use to build upon your idea and make it better. Add action steps which are feasible and can be implemented in your solution.

Notes:

There are different types of feedback:

Supportive feedback: is an encouragement to affirm strengths, note improvement in practice implementation, or highlight accomplishments.

Eg: "You did so great! Keep it up!"
"I did not observe any problems"

Constructive feedback: provides objective and specific information on how the implementation of an interaction can be improved.

Eg: "You can try instead of "

Data-based feedback: Find a coach who can observe and track data of your practices to quickly identify trends of mistakes, areas for improvements or additional implementation effort. Both you and your coach should engage in careful reflection to come to conclusions about the data.

Eg: "I saw that this particular group of user has had the same problems for the last 3 iterations. What do you think is going on?"



IMPACT BUSINESS MODEL CANVAS

Reference: *The Business Model Canvas by Strategyzer*

The Impact Business Model Canvas is a tool for creating a solid business model around your social enterprise. It's also a collaborative tool that helps you communicate different business models with your stakeholders and brainstorm new ones. It is inspired by The business model canvas and reinvented for forprofit, nonprofit, or hybrid venture to tell the story of how your organization generates both financial and social value.

How:

Answer the 16 questions posed by the canvas in a suggested order for answering them. Fill in the canvas once you have the necessary information.

Where to next?

Try Market sizing to look beyond your business into market opportunities.

▶ Market sizing

Answer the 16 questions posed by the canvas in a suggested order for answering them.

1. What is the problem you have identified? Number of people impacted, severity of issue, geography, external factors influencing the problem, etc.

2. Why does your venture exist?
A sentence that express an outcome to which you are committed for a target population

3. Who benefits from your intervention? For whom are you creating value for?
Is it your employees, users, beneficiaries, volunteers, members, recipients, participants, communities, funders, or regulators? They can be your paying customers or simply benefits from your initiative.

4. What is the format of your intervention?
Is it a workshop? A service? A product?

5. What value are you creating for your beneficiaries?
How are you solving a problem, satisfying a need, or delivering benefits in a new way? Is there a relevancy or quantified value or benefits?

6. Who are the people or organization who will pay to address this issue?
They can be one of your beneficiaries, or another segments that willing to pay for your product or service.

7. What value are you creating for your beneficiaries?
Is there a relevancy, quantified value or benefits, a unique differentiation or competitive advantage?

8. How will you show that you're creating impact?
What data can you track and how will you collect and communicate them.

9. How are you reaching your user and customer to deliver your value?

Is it through sales, distribution, communication, etc? Are you establishing personal assistance, selfservice, automated service, community empowerment, cocreation, employee culture, reporting, etc?

10. Keeping in mind profit potential, what revenue(s) are you generating?
Is it through gifts, grants, sponsorships, sales and earned revenue, etc? Break down your revenue sources by %.

11. What resources will you need to run your initiatives?
People, finance, access, interlectual property, physical space, etc?

12. What program and non-program activities will your organization be carrying out to make your business model work?
Name the most important activities. Is it production, service delivery, program management, impact measurement, etc?

13. Who are the essential groups you need to involve to deliver your initiative?
Do you need special access or permission? Who are your strategic alliances, joint ventures, suppliers, etc?

14. What are your biggest expenditure areas?
Is it salaries, costs of production, customer service, evaluation, etc? How do they change as you scale up? How will you minimize them?

15. How do you plan to invest your profit?
Are you reinvesting back into your key activities, or channel to charities and foundation?

16. What is your intended impact?
How much of the identified need are you holding your venture accountable to resolve and in what timeframe?

MARKET SIZING



An important consideration when designing a business model is the size of the market opportunity. While there are many complicated and sophisticated techniques for market sizing, early in your venture development process, you should do a rough estimate. The goal is to understand the general size of the opportunity and any constraints on other building blocks of your business model.

How:

Your first estimate is not likely to reflect the actual market opportunity. A simple and rough way to estimate market size is to do a top-down sizing, in which you decompose the broad market. If the cost of providing your service is very high, then the market opportunity needs to be large enough to support that cost basis. The revenue size also affects your opportunity to raise fund and compete in the market.

Where to next?

Move to Review canvas to evaluate your past accomplishments.

► Review canvas

DESIGN SCENARIO: Market sizing for a cat biscuit product upcycled from food waste.

Let's assume there's 90 million people in Thailand and that there are five people per household.

$$\frac{90,000,000 \text{ people}}{5 \text{ per household}} = 18,000,000 \text{ households}$$

Assume one in five of those households have pets.

$$\frac{18,000,000 \text{ households}}{5} = 3,600,000 \text{ households have pets}$$

If 50% of those households have cats and, of those 1.8 million, 900,000 of them have one and 900,000 have two, then that leaves you with 2.7 million cats.

$$\frac{3,600,000 \text{ households}}{2} = 1,800,000 \text{ households have cats}$$

$(1,800,000 \text{ households} * 50\%) * 1 \text{ cat}$
 $+ (1,800,000 \text{ households} * 50\%) * 2 \text{ cats} = 2,700,000 \text{ cats}$
 Add in 300,000 for strays and you estimate there's 3 million cats.

$$2,700,000 \text{ cats} + 300,000 \text{ stray cats} = 3,000,000 \text{ cats in Thailand}$$

If the average price is 10 Bath per biscuit and the average customer buys five per year per cat, you multiply all those together and estimate 150 million bath per year annual revenue for the entire market.

$$10 \text{ bath} * 5 \text{ biscuits per year per cat} * 3,000,000 \text{ cats} = 150,000,000 \text{ market revenue size}$$



18 million households in Thailand



3.6 million households have pets



2.7 million household cats



Including 300,000 stray cats = there are 3 million cats



Market revenue size is approximately 150 million bath

THEORY OF ACTION

Theory of action is a basic sequence for how the work unfolds. This can be adaptive and take into account the local context of a community. The rigorous nature of this approach requires the establishment of quality benchmarks in order to achieve sustained impact when you implement an initiative, which you can use to take action, communicate your idea to convene collaboration, or appeal for funding and support.

How:

A simple brainstorm, starting with the end in mind can allow you to generate and logically sort the string of outcomes you will need to achieve to meet your goal. Work backwards from there, identifying strategies to accomplish sets of outcomes and naming the resources you will need can allow you to quickly generate your first draft Theory of Action.

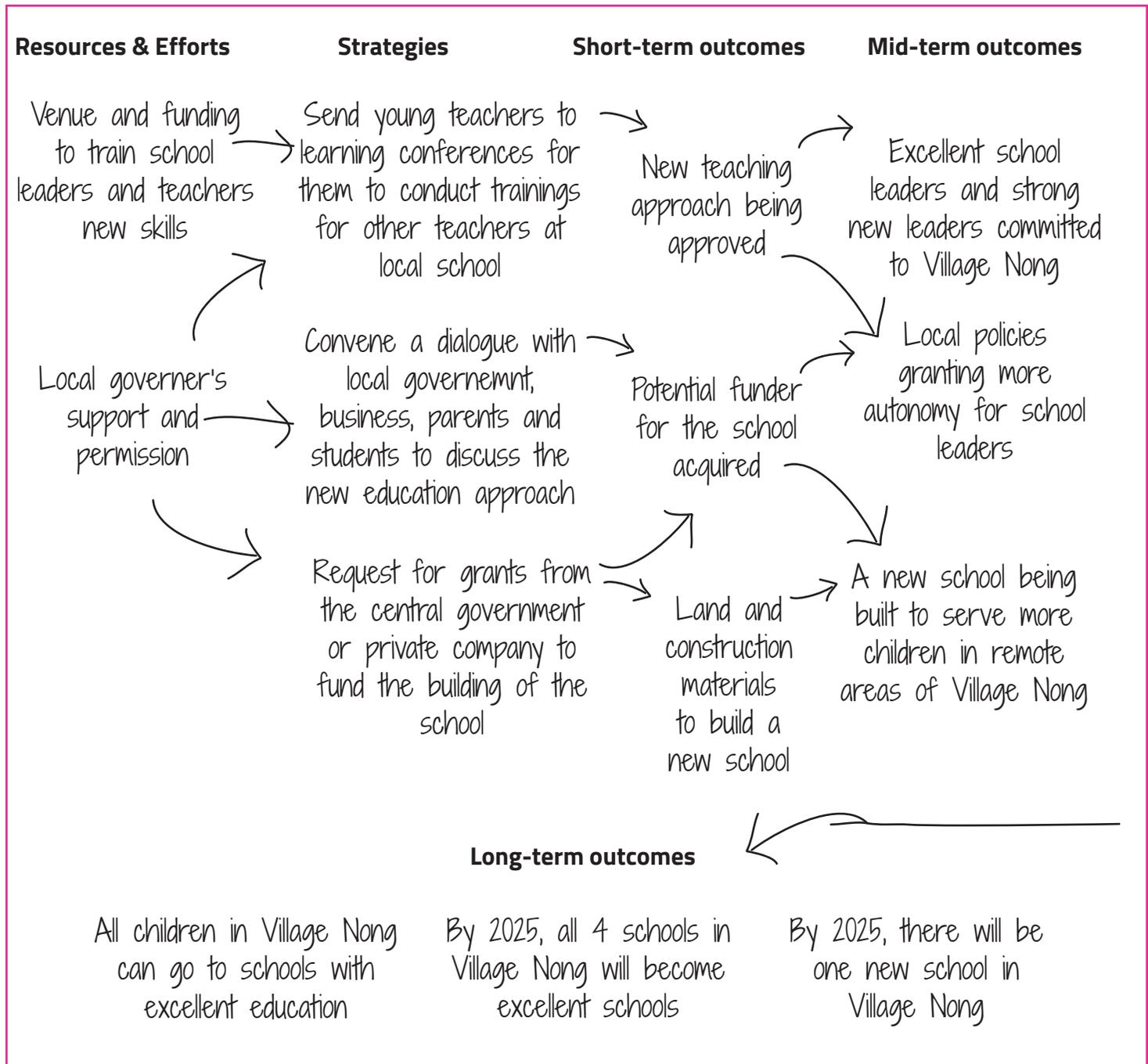
Where to next?

Use Brainstorming techniques or Plan for Action to facilitate how you can populate information in this canvas with the help of others.

◀ Brainstorming techniques

▶ Plan for action

▶ Impact Bento





PLAN FOR ACTION

Reference: *The Collective Action Toolkit* by Frog Design

The proposed activities will help you assign roles and generate tasks to stakeholders around your initiative, and help people move towards common goals.

How:

When convening collective action, it's important to make the tasks and progress visible, with a strong support network along the way and build a sense of ownership and contribution. Engage your stakeholders around your initiative using other tools in this playbook, and the following activities to facilitate the process. You can choose to use each activity individually, or by the suggested sequence number.

Where to next?

Use the Review canvas or Impact level assessment to evaluate the change you created.

- ▶ Review canvas
- ▶ Impact Bento

ACTIVITY 1: SETTING AN AGENDA

When your team needs to prioritize an item on work agenda or if you and your stakeholders need to decide together which issue to work on together:

1.1 Use the Braistorming techniques to answer the question:

"What issues are we trying to solve right now so we can accomplish our overall goal?"

You can also use POV tool in this playbook to start coming up with different POV options to discuss.

1.2 Focus on each issue

For each issue, write down and discuss why the issue is important and when it needs to be resolved. Consider who needs to be involved, and discuss any barriers standing in the way.

1.3. Assess the issues together

As a group, discuss any patterns or themes that you see. Discuss if there are any tasks that can solve multiple challenges.

1.4 Create tasks

From your discussion, write down the tasks your team or each person should do to address the challenges or to resolve the most immediate problem.

ACTIVITY 2: DIVIDE AND CONQUER

When there are many action steps to do, you can split accountability to plan and complete each task:

2.1 List all the tasks you need to accomplish to achieve your goal. Have the group look at all the activities and identify which can be grouped together. Give these similar tasks a category name, such as 'Education' or 'Outreach.'

2.2 Assign people and team to tasks

Ask people to write their initials on the tasks they would like to take. People who are interested in the same task or the same category of tasks can work together as a team.

2.3 Work as a team

Ask each team to write down their goals, responsibilities, and challenges. If there is only one person on a team, share the information of their task to see if they can collaborate and join another team.

As a team, plan how to accomplish these tasks together and divide responsibilities.

PLAN FOR ACTION



ACTIVITY 3: SET THE TIMELINE

Create a schedule for your team to keep track of what needs to get done—and what you've accomplished:

3.1 Establish the pace

Together, discuss how quickly your team wants to accomplish their goals (created in Activity 2).

3.2 Create a team goals calendar

Individually or in smaller technical working groups, write down the final goal you need to complete to solve your overall problem. Draw a calendar showing the days between today and the final date. Write out the interim tasks you need to complete in order to reach your final goal in the calendar.

3.3 Consolidate team dates

Create a large calendar to combine all of the dates from each team. Together, discuss if there are any conflicts or issues. Some tasks may have to wait for other tasks to be completed before moving forward, and dates may need to be adjusted.

ACTIVITY 4: KEEPING THE MOMENTUM

Motivate your team to keep moving forward—and communicate clearly about who's doing what:

4.1 Assign roles and meetings

Choose a person to track the group's decisions and next steps, as well as to be responsible for updating the schedule as the group accomplishes tasks (or doesn't). Together, determine when and where the group will meet for updates.

You can also set up a physical or a virtual workspace where team members can interact and collaborate.

4.2 Update the group

On what each group members have accomplished and what barriers are in the way.

4.3 Answer questions together

- *What has the group accomplished since the last meeting?*
- *What challenges have emerged that the group didn't expect? Who can help with these issues?*
- *How will they best be resolved?*

4.4 Adjust the calendar

Determine if any tasks or dates need to be adjusted in your working calendar (created in Activity 3)

Tip: For the activities to be effective it is ideal to have a facilitator whose main role is to make sure the discussion can be time efficient and productive, and the outputs are well documented and visualized for team's use.

Notes:

You can engage your and your team's families, friends, and the broader community into these activities. Use other tools in this playbook such as the Theory of action to communicate your idea to your community, or use the prototyping tools to utilize the group space for interacting and testing with potential users.



REVIEW CANVAS

Reference: *Social Incubator Review* by School of Changemakers

The Review canvas helps you revisit the work that have been done at the personal level - team - and project scope. It provide a simple alternative of a report that you can use with your team or to communicate with relevant stakeholders. The Review canvas helps filter the most important areas to review to avoid having too much reporting information that require too much time to produce and read.

How:

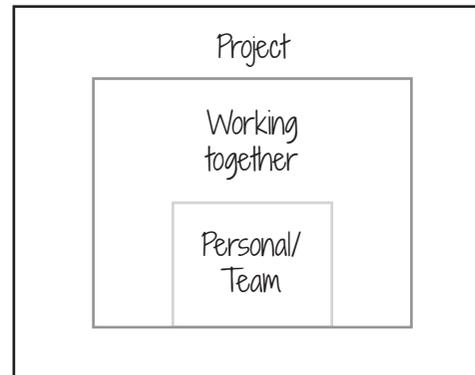
Answer the questions posed by the canvas in a suggested order for answering them. Fill in the canvas individually or as a team once you have the necessary information.

Where to next?

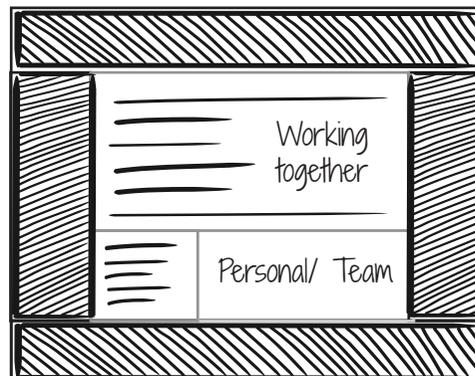
If your initiative is already at a growing or sustainable stage, check out the Coaching canvas to see if empowering other changemakers is your next goal.

- ▶ Coaching canvas
- ▶ Impact Bento

The canvas takes into consideration 3 main aspects for review



Project



Answer the 11 questions posed by the canvas in a suggested order for answering them.

1. **What is the problem you have identified?** Number of people impacted, severity of issue, geography, external factors influencing the problem, etc.
2. **Why does your initiative exist?** A mission statement that express an outcome to which you are committed for a target population
3. **What is your intended impact?** How much of the identified need are you/your team holding accountable to resolve and in what timeframe? What is the vision of change you want to create?
4. **How motivated were you/ your team during the implementation of your initiative?** What motivated or demotivated you?
5. **How efficient are you/ your team in achieving intended impact as perceived by others?** What are the feedback on how you managed your effort, time and resources?
6. **How did you manage the relationships with your strategic stakeholders?** Who have benefited from your initiative? Who is solving the same problem or doing similar work? Who is supporting, collaborating or funding your initiative? Have they already worked with you, or are they ikely to work with you in the future?
7. **What are the problems and issues faced implementing your initiative?** What are the risks and potential threats that have not yet been addressed?
8. **What are the opportunities you have identified?** What are the actions you/ your team should take to improve the initiative?
9. **What is the number of achieved goals over committed goals?** How do you communicate your achievements and progress? Are you effectively addressing social challenges?
10. **What did you do well as a team/ working with others?** What should you continue doing moving forward? What was the success factor of your team?
11. **How did you work as a team/ work with others?** What can you do differently? What are the lessons learned?

REVIEW CANVAS



Your initiative:
.....

1. Problem statement:
What is the problem you have identified?

2. Mission statement:
Why does your initiative exist?

6. Stakeholder relationships Beneficiaries <i>Who have benefited from your initiative?</i> <i>Who is solving the same problem or doing similar work?</i> Partners <i>Who is supporting, collaborating or funding your initiative?</i>	11. Areas for improvements <i>How did you work as a team/ work with others? What can you do differently?</i>	10. Areas that went well <i>What did you do well as a team/ working with others? What should you continue doing moving forward?</i>		9. Progress <i>What is the number of achieved goals over committed goals?</i>
	5. Perceived efficiency <i>How efficient are you/ your team in achieving intended impact as perceived by others?</i>	4. Motivation <i>How motivated were you/ your team during implementation?</i>	3. Intended impact <i>How much of the identified need are you/your team holding accountable to resolve and in what timeframe? What is the vision of change you want to create?</i>	
7. Gaps <i>What are the problems and issues faced implementing your initiative? What are the risks and potential threats that have not yet been addressed?</i>		8. Opportunities <i>What are the actions you/ your team should take to improve the initiative?</i>		

Tip: You can use the building blocks of the canvas to further create a report that are easy to understand and visually attractive to your audience.

Notes:

Continuous improvements can be achieved by having a clear idea of what we want to achieve, what are the main obstacles and where we are towards our goals.

Individual components of the review can be customized. However, it should be based on the three minimum evaluation of self/team - how we work with others - and the project progress.

COACHING CANVAS

Reference: *The Coaching Canvas* by Martin Alaimo, Kleer

The Coaching canvas looks at goals, barriers and accelerants to achieving the goal, as well as having space for action planning. It is a simple yet effective tool to help you structure and develop a coaching conversation. It is a communication tool that helps you facilitate great coaching conversations in an interactive and engaging way.

How:

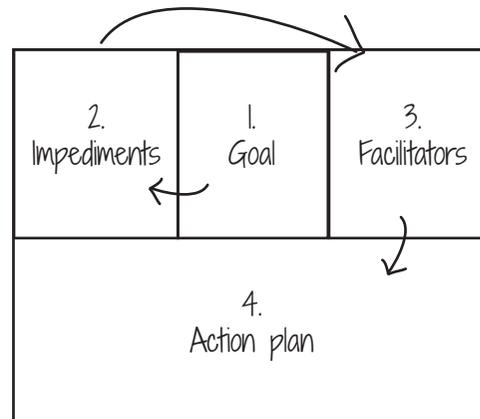
Set goals together with your coachee, and answer the questions posed by the canvas in a suggested order for answering them.

Where to next?

If you enjoy coaching others, try the Social incubator canvas to see if incubating new ideas and local changemakers is your next ambition.

► **Social incubator canvas**

The canvas takes into consideration 4 main aspects for coaching:



Answer the 9 questions posed by the canvas in a suggested order for answering them.

- 1. Identifying what the goal of the coachee is.** Why are we having this conversation? What does the coachee want to achieve?
- 2. What are the coachee's standout characteristics?** Take some time to talk about coachee's actions or behaviors that have been observed or feedback by others.
- 3. How is the coachee's emotional well-being?** Take some time to talk about coachee's emotions and feelings that drive his/her behaviors.
- 4. What internal conversations or thoughts does the coachee have?** Have a discussion about the coachee internal conversations or thoughts that support the behaviors and emotions mentioned above.
- 5. What changes does the coachee think are possible and necessary?** Inspect with the coachee are those required changes which he/she identified as possibilities. These changes may relate to his or her own behavior, emotions or internal conversations.
- 6 - 7. How did you manage the relationships with your strategic stakeholders?** Discuss with your coachee about the resources he/she has, the relationships he/she can leverage, the strengths identified in his or her person and the improvements both in skills and knowledge he/she believes are necessary.
- 8 - 9. What are the actions the coachee can take? In what way the coach can support?** Each of these concrete actions should have a completion date and, if possible, a metric that helps the coachee establishing the desired standards for achievements.

COACHING CANVAS



Coach:.....

Coachee:.....

Date:.....

4. Internal conversations <i>What internal thoughts does the coachee have?</i>	2. Behaviors	1. Goal <i>What does the coachee want to achieve?</i>	6. Resources/Relationships <i>Who/ what kind of resources the coachee can utilize for change?</i>	5. Required changes <i>What changes does the coachee think are possible and necessary?</i>
	3. Emotions		7. Strengths/improvements <i>What are the existing skills & knowledge the coachee has and areas for improvements?</i>	
8. Actions <i>What are the actions the coachee can take? In what way the coach can support?</i>		9. Metrics/ Timeline <i>What are the desired achievements?</i>		

Tip: Pay attention to not only what the coachee says but also their verbal languages, behaviors in contrast with intention, and the broader situation and context that they're in.

Notes:

Coaching requires different knowledge and skills that you can acquire through practices over time.

Throughout this playbook, each tool embdded reflection spaces and notes on how to use the tool at a more advanced level. Visit the reflection and notes sections of each tool to identify the conversation and coaching spaces you can have with your coachee. It is advised to coach using the tools and methods that you are familiar with or have had practices using.



SOCIAL INCUBATION CANVAS

Reference: *Social Incubation Canvas* by School of Changemakers

There are plenty opportunities to address economic, social or environmental challenges at different level within a community. Social incubators provide crucial support at the early stages of social initiatives with seed funding and professional development. Designing a great incubation program that can support the development of inspirations and ideas at grassroots level for social innovation experimentation, is yet an exciting impact making journey to explore.

How:

Start by writing down the target incubatee profile you want to design for. Fill in the canvas individually or as a team.

Where to next?

Get in touch with the playbook Helpdesk if you wish to launch an incubation program in your local community. There are more resources and tools you can use from our social incubator network!

Answer the 9 questions posed by the canvas in a suggested order for answering them.

1. Who are your target incubatee profile?

Which user profile would make the most impact in your community? Are they social activists, social innovators, social entrepreneurs, or others? Are there already incubation programs dedicated to them, or are you reaching a new group of changemakers?

2. Which stages of the changemaking journey you want to support your changemakers?

Revisit other tools in this playbook to see which development stages of an initiative fascinate you the most.

3. What are your selection criteria and process?

How can you find your ideal candidate? What quality standards are acceptable for you? How will you recruit and select them?

4. What are the program activities in your incubation program?

The program elements are divided to the 4 main areas of incubation supports. You should identify activities that you can implement on a regular basis for at least 6-12 months.

5. What are the incubatee' needs that your program can deliver?

In what ways might you add in values to their changemaking journey?

6. What are the competency needed to bring your program to reality?

Are you gathering a team? What competencies are missing? How can you acquire those competencies?

7. Who will help you bring your program to reality?

Are there strategic partners or funders you can reach out to? Who are the people you need to be involved with? What will be the form of collaboration?

8. What is your sustainability model?

Break down your revenue stream by %.

9. What is your cost structure?

What are your biggest expenditure areas? How do they change as you scale up? How will you minimize them?



IMPACT BENTO

Created by: Impact Bento by
ChangeFusion

Impact Bento is a collection of impact management tools for impact planning, measurement, reporting and internal improvement. While most of the current methodologies and tools mainly focus on impact measurement, Impact Bento takes a more holistic approach to the impact management process as it demonstrates a clear impact report, and helps with due diligence, risk management, performance management, fundraising as well as marketing and branding. The impact model helps provide a framework to show how impact would be created through various stakeholders and how outcomes are linked in a logical manner. It will also guide you on how to collect data for each outcome. Impact Bento is designed for government; public, private and social enterprises; as well as NGO and non-profit organizations.

How:

Step 1 : Define project scope
Define scope of intervention by outlining the problems the project is trying to solve, the execution process, and identify key stakeholders.

Step 1 : Define Project Scope

<p>Problem</p> <p>Communities exploited by mainstream tourism practices</p>	<p>Solution</p> <ol style="list-style-type: none"> 1) Tourism management knowhow 2) Ethical agent + market channel 3) Community development fund 	<p>Impact Goal</p> <p>Communities benefited economically, socially and environmentally through CBT</p>
<p>Direct Beneficiary</p> <p>Villagers engaged in tourism activities</p>	<p>Indirect Beneficiary</p> <ol style="list-style-type: none"> 1) Villagers not engaged in tourism activities 2) Local government 	<p>Negatively affected group</p> <p>Nearby communities that have not received support in CBT development</p>

IMPACT BENTO



Step 1 : Define Project Scope

Problem	Solution	Impact Goal
Direct Beneficiary	Indirect Beneficiary	Negatively affected group

Tips:

Clearly defined scope and goals will enable you to effectively engage the stakeholders in later steps for impact assessment. Notice the negative impact your project creates will help you reflect and improve your development.



IMPACT BENTO

Created by: Impact Bento by ChangeFusion

How:

Step 2 : Establish impact model
 Establish the impact model for your project and set data collection plan. Select one key stakeholder for impact assessment and determine its demography of your change initiatives. Fill in the rest of the canvas once you have the necessary information or map out the expected outputs and outcomes so that you can plan your project development accordingly. Repeat the steps for your other stakeholders one by one.

Where to next?

See if incubating new ideas and local changemakers is your next ambition. Or get in touch with the playbook Helpdesk to let a wilder community know about the impact that you have made in your community.

► **Social incubator canvas**

Step 2 : Establish impact model

Stakeholder: Villagers engaged in tourism activities		Demographic: 1 village in Chiang Rai → 10 households (homestay, guide, meal, workshop, etc.) → Main source of income - agriculture		
Input CBT Workshop Hardware (homestay, washrooms, catering) Software (guide, activities, garbage management system)	Output 2 CBT workshops organized 1 tour package developed 6 households developed for homestay 3 guides trained	Outcome		
		Short term	Mid term	Final
		Better living environment Capability in managing tour Additional source of income	Set up of community fund Better financial health (debt/saving)	Well-being of community Retain young generation Preservation of local culture
Indicators		Short term	Mid term	Final
		Rise in no. of tours taken Rise in monthly income	Amount of community fund Amount of household debt/saving	Rise in no. of youths engaged in CBT

IMPACT BENTO



Step 2 : Establish impact model

Stakeholder:		Demographic:		
		→ →		
Input	Output	Outcome		
		Short term	Mid term	Final
Indicators		Short term	Mid term	Final

Tip: To set impact indicators for your change initiative, you can reference existing frameworks, such as the Sustainable Development Goals with 17 goals, 169 targets and 232 indicators for sustainable social, economic and environmental development

Notes:

Impact management is vital not only to the key partners and funders, but also the beneficiaries receiving intervention themselves. Data from measuring impact will provide valuable information as to whether projects are effective, sustainable or creating desired impact. Communicating your impact in a transparent and easy to understand manners can impress the public of being accountable, raise awareness of the issues and attracts additional support.

THANK YOU FOR THE CONTRIBUTION OF:

Change Fusion
Good Factory
Learn Education
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School of Changemakers
SEED
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The Coaching Canvas, 2019. Martin Alaimo.
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The Social Incubation Canvas, 2019. School of Changemakers.

When use the materials in this toolkit, please reference us as:

The Social Incubation Playbook, 2019. UNDP Thailand.

If you're interested in gaining access to this toolkit for localization or adaptation purposes, please contact us at www.thailandsocialinnovationplatform.org



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