

Social Contagion as a means to transitions

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Design for Social Contagion

# HANDBOOK

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This toolkit is developed by Jesal Shah as a part of her Strategic product design master thesis 'Social contagion as a means to transitions' at Delft University of Technology.

It is designed for Gemeente Rotterdam, in association with the ENRGISED project; under the guidance of Dr. Rebecca Price, Dr. ir. Jotte de Koning and Mr. Jacco Kwakman.

For more details on the thesis & toolkit, visit <https://repository.tudelft.nl>

# HANDBOOK INTRODUCTION

This handbook is designed as a part of the 'Design for social contagion' toolkit. It should be used along with the inspiration card deck and the set of canvases - which are part of the toolkit.

The handbook gives a brief introduction about the phenomenon of social contagion (social influence) and how it is useful to activate residents towards the energy transition.

Next, the handbook presents the 'Design for social contagion' Framework. This framework guides the overall process of designing and stimulating contagion (of the target behaviour) qualitatively, by providing actionable steps.

To enable the contagion, persuasive and tactical strategies of inducing behaviour need to be developed and applied in the form of interventions. This 'Design for social contagion' toolkit helps in designing these strategies and interventions.

The handbook outlines the different components of the toolkit, the logic of designing interventions aimed at social contagion (anatomy of an intervention) and a step-wise explanation of how to use the toolkit.

The toolkit is developed to be used in a creative session. Thus, it is ideal that all participants go through this handbook before (or during) the creative session. If not, at least the organizers (or facilitators) of the workshop should go through it beforehand, such that they are familiar with all the elements and the process, and can explain it to the team during the session.

# SOCIAL CONTAGION

## The energy transition

In the wake of global warming and the earthquakes in Groningen, the government of Netherlands has set the goal to reduce greenhouse gas emissions by 49% in 2030 compared to 1990 levels. An energy transition in the built environment is identified as one of the means to achieve this goal. The vision includes the transformation of 7 million homes & 1 million buildings, which are moderately insulated and heated by natural gas, into well insulated buildings that are heated using renewable sources.

Since alternate technologies are already available in the market, the government plans to adopt (to begin with) pricing and subsidising measures to enable the transformation – (financial) incentivisation being the key strategy. The challenge here is that large scale adoption is a necessary condition to regulate the prices, even if the technology is economically viable. Moreover, the provision of subsidies & funding, and the presence of technological alternatives does not imply that households will actively opt for gas discontinuation.

At the micro scale, the transition involves (financial) investments in terms of infrastructural changes, time and energy by the residents in order to upgrade the wiring, insulation as well as heating sources. The return on this investment is not visible in the immediate future and poses uncertainty in financial savings in the long-term. It also entails short-term inconveniences in routines. Thus, even if residents have a positive attitude towards the energy transition, given this perception of inconvenience and uncertainty, it does not reflect in their choices towards transitioning away from natural gas.

Hence, the transition is predominantly a social challenge (a societal transition) wherein participation of a critical mass is a pre-requisite to achieve the set goals. It is clear that solely top-down (policy-driven) solutions are not enough to motivate the critical mass. Bottom-up, socially-driven interventions are required to activate residents. This project helps in designing these socially- driven interventions.

## Social influence on decision-making

Several theories within the domains of psychology, sociology and anthropology highlight that an individual's actions, behaviour and decisions are influenced by contextual factors, especially the social groups they belong to, and the social norms that these ensue. These argue that individual decisions are 'constructed' or determined by social and technological systems wherein needs, attitudes, and expectations are not individual in nature but are embedded in ongoing relations and networks of relations.

People are strongly influenced by the (in)action of others, which implies that one would act only if several others have chosen to act. People have the tendency to imitate behaviors of others who are either in their vicinity (belong to similar social groups), or whom they aspire to be. Here, one's social identity, social networks and the social norms these ensue can be seen as the building blocks of social influence, and constitute an important leverage point in shaping people's behaviours. Thus, social influence (social contagion) can be a means of scaling up the desirability, acceptance and adoption of greener energy alternatives.

This project explores and builds upon this social construction of an individual's decision-making process and its building blocks. It outlines how social influence processes, and the phenomenon of social contagion can be used to activate citizens towards the energy transition through the 'Design for social contagion' framework and toolkit.

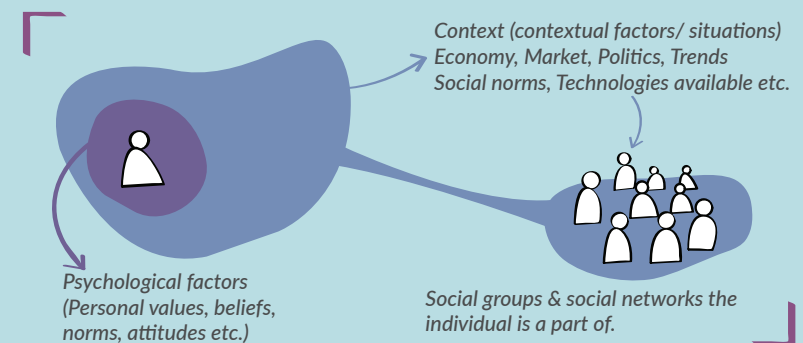


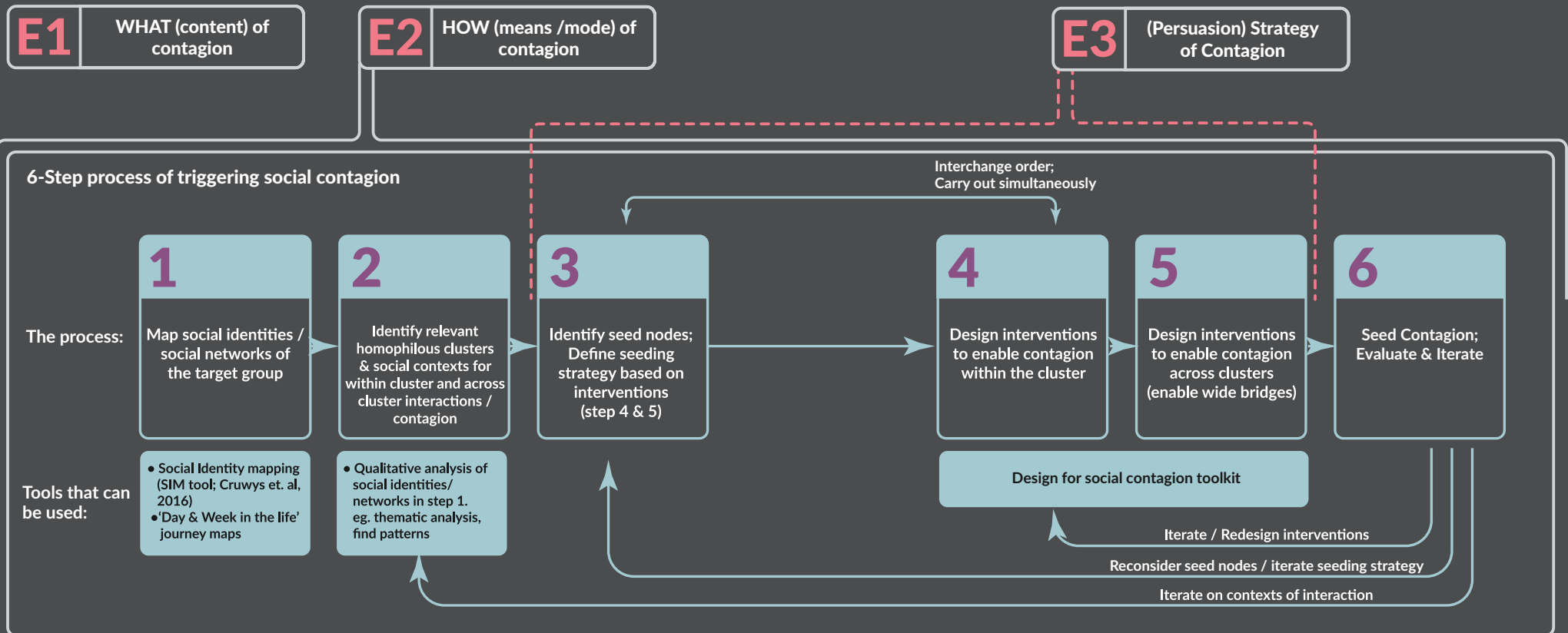
Figure 1: Factors that influence an individual's decision-making

# FRAMEWORK

To ensure positive outcomes and a far reach, the social influence and social contagion process needs to be well-curated and designed for. The 'Design for social contagion framework' (shown below) outlines actionable steps to design the contagion process. It includes 3 key elements that need to be thought off while shaping the contagion, and a 6-step process that helps to visualise (and design) how the contagion will unfold in a particular context. The framework builds on complex contagion theory.

The 'Design for social contagion' toolkit (presented subsequently) helps in defining the 'Strategy element (E3)' of the framework and aids in designing the interventions for contagion (Step 4 & 5 of the process).

(Define the) Elements of a contagion



## The 3 Elements of contagion

# E1

### WHAT of contagion

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This includes defining the content or the target behaviour that needs to be spread amongst a population. In the case of gas discontinuation in the built environment, the WHAT can be the contagion of positive attitudes or decision towards shifting to greener energy alternatives. It can also be determined by understanding the residents' motivations and apprehensions towards the gas discontinuation.

# E2

### HOW of contagion

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The HOW refers to the means / mode of contagion. This includes visualising and designing the network dynamics of the contagion – how the contagion will unfold, who will initiate it, how will it spread, where will the contagion take place. The 6-step process outlined subsequently helps in defining this element of the contagion.

# E3

### STRATEGY of contagion

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While the HOW component refers to identifying the who's and visualizing the process of how the contagion will unfold, the strategy component involves devising persuasive and tactical ways of inducing the behaviour. This component goes hand-in-hand with step 3, 4 and 5 of the 6-step process described. The inspiration cards in this 'Design for social contagion toolkit' help to define this element.

## The 6-step process (to define E2 & E3)

# 1

### Map social identities & networks of the target group

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In order to understand how contagion can be seeded, the first step is to understand people's social networks; which can be defined using their social identities. Use tools such as Social Identity Mapping (SIM tool; Cruwys et. al, 2016), Ethnographic Social network mapping (Trotter II, 1999) or methods like Day-in-the-life or Week-in-the-life mapping to identify the target group's social identities and the social networks these engender.

# 2

### Identify relevant homophilous clusters & social contexts

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Analyse (qualitatively) the social identities and networks derived in step 1 to define relevant homophilous clusters (groups where individuals have similar characteristics, e.g. cultural background, physical appearance, tastes etc.). Based on the clusters identify two types of social contexts where interactions to spread the behaviour can take place-1) which enable spread of behaviour within each cluster; 2) which enable spread of behaviour across different clusters.

For example, if the relevant identity of the target group is based on the houses they live in (similar people live in the same building / locality), the context for within cluster contagion is the vicinity of the houses. Contexts for across clusters contagion are public spaces like the church, gym, busstops, activity centres etc., where individuals from different vicinity clusters interact.

(continued..)

### Identify seed nodes; Define seeding strategy

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3

Having identified the social networks and contexts of contagion, the next step is to identify seed nodes (people who can initiate the contagion; within and across clusters). These can be selected based on the intent & content of contagion e.g.. most influential people, people with biggest networks, people already activated, entrepreneurial & active people etc. This step goes hand-in-hand with steps 4 & 5. Define seeding strategy. Use clustered seeding (multiple seeds in each cluster).

### Design interventions to enable contagion within the clusters

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4

Use this toolkit to design (facilitate) interactions (in the identified social contexts) between people within a cluster. (Note: people need reinforcement from multiple sources before they adopt the behaviour; design interventions accordingly).

### Design interventions to enable contagion across the clusters

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5

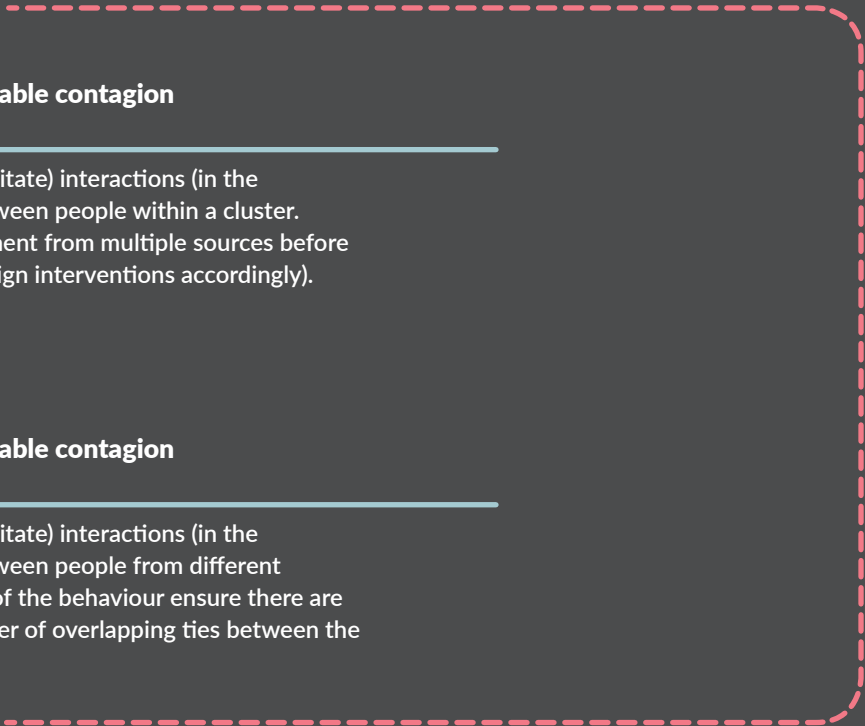
Use this toolkit to design (facilitate) interactions (in the identified social contexts) between people from different clusters. For effective spread of the behaviour ensure there are wide bridges (maximum number of overlapping ties between the clusters).

### Seed the contagion; Evaluate & Iterate

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6

After seeding the contagion, evaluate the spread and effect of the interventions. If required, iterate on the interventions, seed the intervention in different social contexts or use a different seeding strategy.



This 'Design for social contagion' toolkit helps to design these interventions that can enable the contagion of the target behaviour.

# Design for Social Contagion TOOLKIT

This toolkit is developed to help municipalities in designing interventions that stimulate social contagion of favourable attitudes and opt-in towards gas discontinuation amongst residents. It should be used along with the 'Design for social contagion framework presented before. The toolkit provides inspiration to devise persuasive and tactical ways of inducing the target behaviour (i.e. defining the STRATEGY element -E3 of the framework; and Step 4 & 5 in HOW process).

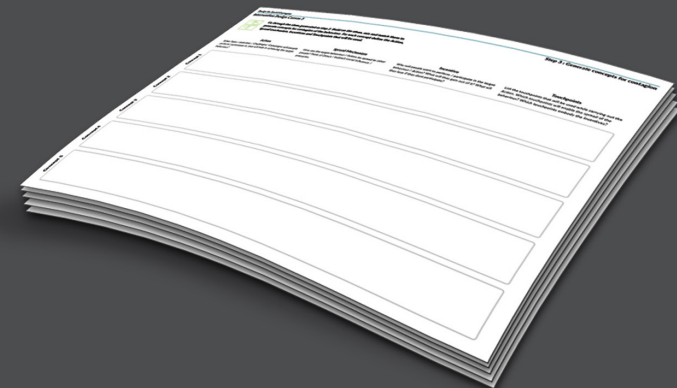
The interventions can be designed for both, the attitude formation phase and the decision-making phase. In the attitude formation phase, several small interventions need to be designed, which engage the users over a longer time and build commitment; overcoming the apprehensions and other barriers to adoption. In the decision-making phase, interventions can be designed to build social pressure, prompting positive decisions.

## Contents of the toolkit

The toolkit consists of 3 items:

- 1) A deck of inspiration cards
- 2) A set of 5 design canvases (that guide the design process); and
- 3) This handbook

This handbook outlines how to use the inspiration cards and canvases to design the interventions. The next section outlines the anatomy of an intervention (for social contagion), as identified through the project – which needs to be kept in mind while designing the interventions. Subsequently, the inspiration cards and canvases are presented.





# ANATOMY of an intervention

Figure 2 outlines the anatomy of an intervention aimed at stimulating social contagion. Each intervention should:

- Fulfill 2 criteria
- Follow 4 design principles
- Constitute 4 design components

These elements help in guiding the design process and ensuring that the interventions can enable social contagion of the target behaviour. These can also serve as evaluation criteria while selecting concepts. The elements in the anatomy of an intervention are explained in brief next. In-depth explanation and strategies that can be used to design each of these are captured in the inspiration cards.

Before starting the creative session, each team member should familiarise themselves with this anatomy of an intervention (either go through the inspiration cards related to each element, or this handbook).

## Design Criteria

Each intervention needs to meet two criteria:

- 1) Enable the target behaviour: It needs to meet the overall goal of the contagion
  - Enable the target behaviour to overcome apprehensions towards or barriers to adoption. Examples of target behaviour are 'understand the urgency to act towards gas discontinuation', or 'comprehension of alternative technologies'.
- 2) Enable contagion of the behaviour: Each intervention needs to give rise to (prompt) social contagion of the target behaviour (defined in criteria 1) amongst the target group.

*Note: While social contagion can be used to spread positive attitudes, it can also spread resistance. Thus, the interventions need to be well-thought through, and the negative impacts / obstacles should be foreseen and mitigated.*

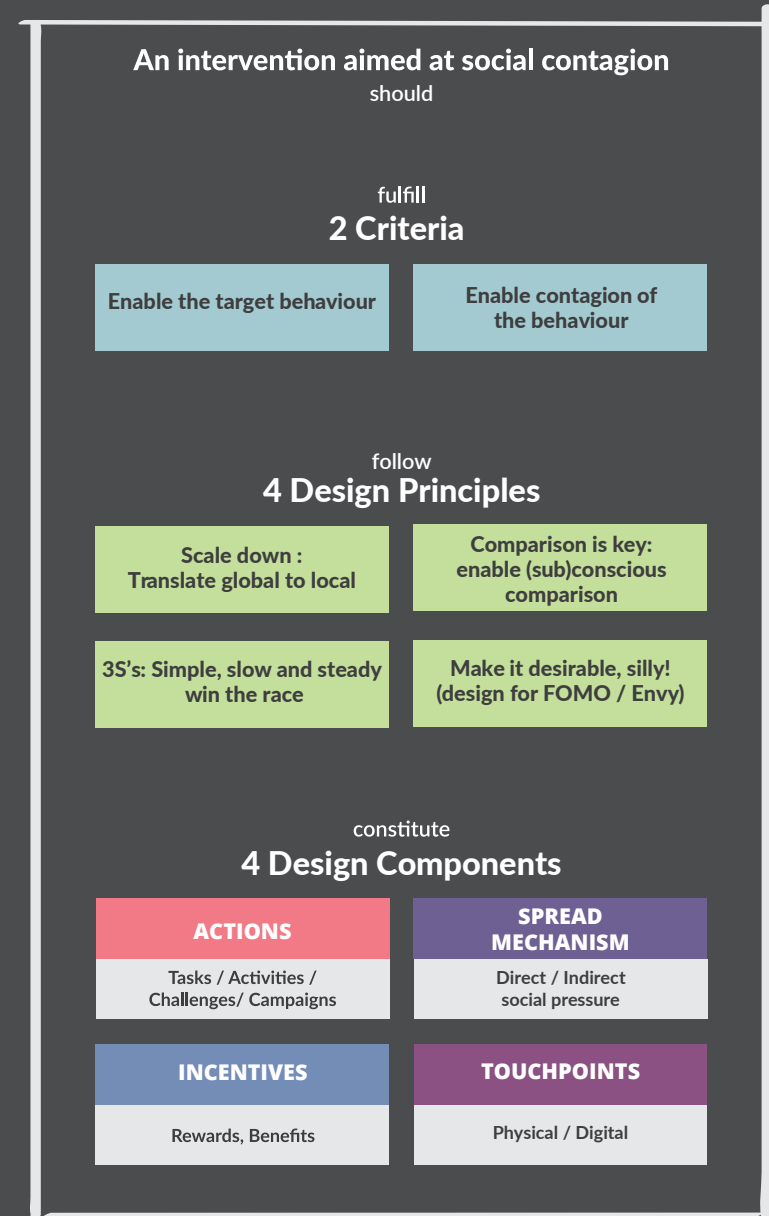


Figure 2: Anatomy of an intervention aimed at social contagion

## Design Principles

Since designing interventions for social contagions is an unhackneyed approach to activating residents towards gas discontinuation, the following four design principles are defined in order to streamline the ideation process.

# 1

### Scale down: Translate global to local

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Prompt action and pro-active adoption is pursued only when something affects you directly or is relatable. Thus, global phenomenon like climate change and sustainability need to be translated into locally / individually relevant and recognisable issues, in order to capture people's attention and trigger action.

# 2

### 3 S's -Simple, slow and steady win the race

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In order to encourage people to take action, it is necessary to reduce the effort they need to put in. The target behaviour and the interventions should be easy to do, use, remember and understand; and should be incremental (and continuous) in nature to build commitment amongst the target group towards the desired behaviour.

# 3

### Comparison is key: enable (sub)conscious comparison

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People constantly compare and evaluate themselves in terms of the appropriateness of their abilities, behaviours and beliefs to those of similar others. They use social norms (social proof) to guide their behaviours and manage their social identities. Thus, in order to achieve social contagion, this (sub) conscious comparison to people who have adopted or are committed towards the target behaviour must be stimulated.

# 4

### Make it desirable, silly!

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People need to have both, intrinsic and extrinsic motivations to opt for sustainable options. Making the behaviour desirable (by designing incentives) can help in prompting adoption as well as inducing emotions such as fear of missing out, envy, insecurity etc., upon comparison. These in turn increase the desirability of the behaviour, stimulating adoption and paving the way for social contagion.

## Design Components

Interventions aimed at social contagion should consist of four key components, which give shape to the design principles and design criteria. Each component needs to be well-thought of and designed for, to achieve favourable outcomes.

# A

### Action

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This component defines 'What do people need to do / see' in order to engage them in the desired behaviour (meeting the 1st criteria - enable the target behaviour). This can be in the form of tasks, activities, challenges, campaigns or installations, wherein people are asked to do (create, solve, collect, share, experience etc.) something; engaging them directly or indirectly.

# S

### Spread Mechanism

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The Spread Mechanism defines how the Action or the target behaviour will spread amongst the target group. This can be in the form of direct or indirect social pressures.

# I

### Incentive

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For each intervention, intrinsic and extrinsic motivations that make people want to do the target behaviour or participate in /perform the Action, need to be explicitly designed. Along with motivating people to participate in the Action, these should stimulate comparison amongst peers.

# T

### Touchpoints

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Touchpoints form the interface between people and the target behaviour, defining 'How will people do the Action or spread the behaviour'. These can be physical or digital - in the form of artefacts, environments or interpersonal encounters. Explicitly designing touchpoints can ensure well-curated interactions & experiences, which are necessary to build positive attitudes.

# INSPIRATION CARDS

The inspiration deck includes cards that capture the design criteria, design principles and design components. Further, for each design component (Action, Spread mechanism, Incentive and Touchpoint), there are several categories of strategy cards, each of which outlines a persuasive strategy that can be used to design the specific component. These cards provide inspiration during the creative session, and should be used along with the canvases.

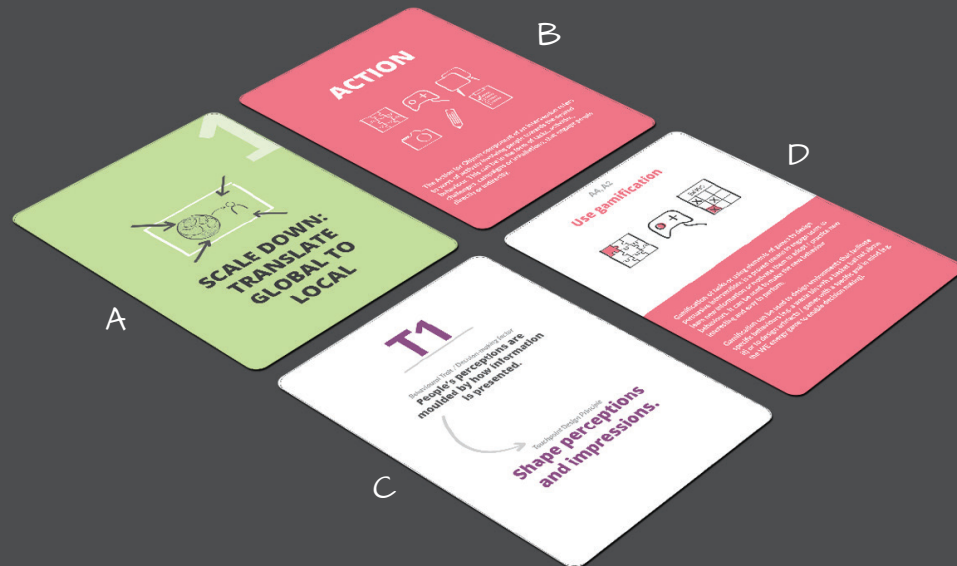


Figure 3: The four type of cards in the Inspiration card deck

There are four types of inspiration cards (as shown in figure 3):

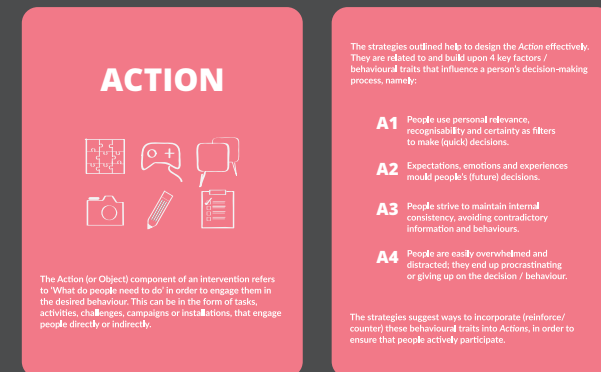
## 1) Design criteria and design principle cards (Figure 3A):

Each design criteria and design principle is captured on one card. The back-side gives a brief explanation of the design criteria /principle. Each participant should familiarise themselves with these before starting the creative session. Place these cards in the centre (or where they are visible to all), such that they are easy to refer to during the session.



## 2) Component index cards (Figure 3B):

Each design component is explained on 1 or 2 Component index cards. These state what the component is, how to brainstorm ideas for the component, and the explanation of the categorisation (and categories) of strategies under that component. Each component is assigned a specific colour.



### 3) Category Index cards (Figure 3C):

The categories under each component have a category index card. The Component design principles (e.g., A1, A2, T1, S1, S2 etc.) are outlined on the front side. The back side provides the list of relevant strategies that fall under that category. These follow the colour scheme based on the design component they belong to.

## T1

Behavioural Trait / Decision-making factor

**People's perceptions are moulded by how information is presented.**

Touchpoint Design Principle

Shape perceptions and impressions.

## T1

**Relevant strategies:**

- 1) (Re) Frame
- 2) Show scarcity (of time &/or supply)
- 3) Humanise it
- 4) Use anchoring
- 5) Use analogies
- 6) Increase salience (make it stand out)

**Other strategies that can be used:**

- Combine facts with vivid content
- Personalise it
- Choice architecture (defaults, enhanced active choice, recommended options)

### 4) Strategy cards (Figure 3D):

Each strategy card outlines one persuasive technique relevant to the design component (indicated by the colour). Further, the front side outlines the Categories / Component design principles (A1, A2, T1 etc.) that the strategy falls under (right above the name of the strategy), along with the explanation of the strategy. The back side provides an example of the application of the strategy and suggestions on how the strategy can be used.

## A4, A2

### Use gamification

**Example:**  
Tim Holley's Tio lets children become energy champions of their house, influencing parental behaviour. Information is sent from the wall switch to the computer app, which allows the child to track the lighting user's performance over a period of time. The child takes care of a 'virtual tree' by moderating their lighting-use performance. This engages children to make a personal contribution to reducing energy consumption.

**Ways to use gamification:**

- Let people solve puzzles, take quizzes, play a board game to stimulate conversation, prime people towards something, or for people to learn new information/ make decisions.
- Use game design elements like unlocking levels, player profiles, one-to-one competition to engage people in the activity.
- Environments designed using gamification elements can help evoke specific emotions, shaping people's expectations or experiences.

## Design for Social Contagion

# DESIGN CANVASES

A set of 5 design canvases is developed to guide the design process during a creative session. Each canvas covers one step of the design process, namely:

- 1) Define design question
- 2) Brainstorm ideas
- 3) Generate concepts for contagion
- 4) Evaluate and select concepts
- 5) Detail the selected concepts

A step-by-step explanation of the canvases, and how to use these along with the inspiration cards is provided in the next section.

The figure shows five design canvases arranged in a grid, numbered 1 to 5. Each canvas is a template for a specific step in the design process:

- Canvas 1 (Step 1: Define Design Question):** Includes sections for 'Define the user', 'Define the problem', and 'Define the design question'. It features a table for 'Action', 'Justification', and 'Rationale'.
- Canvas 2 (Step 2: Brainstorm Ideas):** Includes sections for 'Define the user', 'Define the problem', and 'Define the design question'. It features a table for 'Action', 'Justification', and 'Rationale'.
- Canvas 3 (Step 3: Generate Concepts for Contagion):** Includes sections for 'Define the user', 'Define the problem', and 'Define the design question'. It features a table for 'Action', 'Justification', and 'Rationale'.
- Canvas 4 (Step 4: Evaluate and Select Concepts):** Includes sections for 'Define the user', 'Define the problem', and 'Define the design question'. It features a table for 'Action', 'Justification', and 'Rationale'.
- Canvas 5 (Step 5: Detail the Selected Concepts):** Includes sections for 'Define the user', 'Define the problem', and 'Define the design question'. It features a table for 'Action', 'Justification', and 'Rationale'.

# USING THE TOOLKIT

This section walks you through the process of using the toolkit. Each canvas and the steps it includes are outlined with an explanation of what the steps entail and recommendations of how to use the cards along the process. Filled-in examples are used to illustrate what the output of each step would look like.

## STEP 0: PREPARATION & FAMILIARISATION

- The toolkit is designed to be used during a creative session to design interventions aimed at social contagion. It is recommended to **use the toolkit as a team (of min. 3 people)**. However, it can be used by individuals as well. In case there are more than 3 participants, **breakout into smaller teams of 2-3 participants while carrying out steps 2 and 3**.
- Although the toolkit is designed for municipal officials and is structured in a way that they can understand the process and do it themselves, **a mixed group of participants** with a few designers and municipality officials would lead to better outcomes.
- The ideal **duration** for the creative session would be **4-5 hours (or a day long workshop)** with several breaks in between. Block out enough time for the session, well in advance.
- The workshop **can be carried out physically (offline) or digitally (online)**; through a creative platform like Miro, or Mural).
- For an offline workshop, book a room big enough such that each breakout team has a working space of its own. **Things you need during the offline session:**
  - Few decks of inspiration cards
  - Prints of the set of canvases (print a set for each breakout team)
  - This handbook for reference
  - Post-its
  - Writing / drawing stationery (different colour markers for voting)
  - Different colour dot stickers (for dot voting)

- For an **online workshop** on a platform like Miro, the organiser (or facilitator) should **create digital workspaces for each breakout team** using the set of canvases (as shown in figure 4).
- It is recommended to **have a facilitator** for the creative session, who can manage, monitor and guide the process. Having a facilitator with a design training would prove to be advantageous. If not, the facilitator should be familiar with the purpose and process of the workshop. They can be assigned the responsibility to go through the design process or the handbook well in advance to be able to explain the process and details to the participants during the session.
- Short energizers** should be incorporated in the process, in order to stimulate creativity. **Take a short break after each step**.
- Before starting the session, the **participants should familiarise themselves with the purpose and process of the session**. They can be given a short presentation by the organiser (facilitator), or can go through this manual.
- It is a **must that each participant understands the anatomy of an intervention** and the different types of inspiration cards. **Allot specific time for this familiarisation phase**. Once all participants have understood the anatomy of an intervention (the design criteria, principles and components), the creative session can begin.

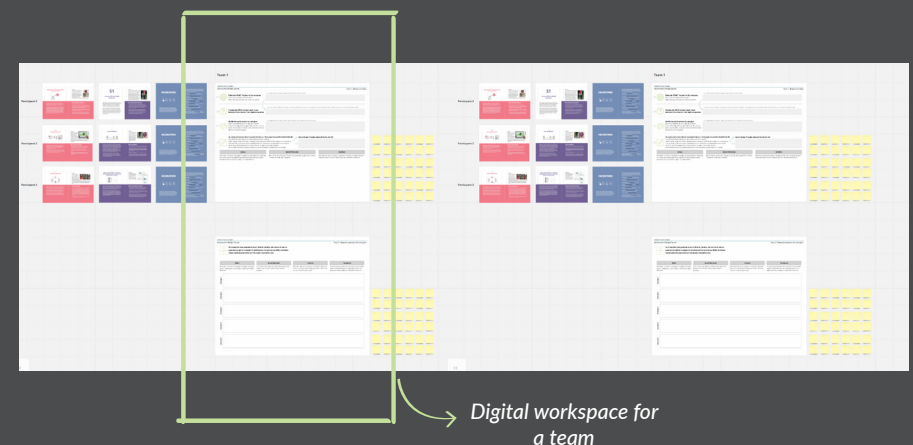


Figure 4: Team-wise workspace set-up for an online workshop on Miro.

## STEP 1: DEFINE DESIGN QUESTION

Use Canvas 1 for this step. Carry out this step with all the participants.

Before starting the brainstorm, define the design question for the creative session. Through discussion, the team should identify what would be the content for contagion or what is the goal /target behaviour to be achieved through the contagion.

This can also be pre-defined by the project owner or through research carried out in field (for example, on the motivations and apprehensions of residents). This canvas helps the team to define this design question through 4 sub-steps (1A, 1B, 1C, 1D).

### 1A



#### Define the overall GOAL of contagion / project

Think of what is the target behaviour that needs to be spread?  
This can include the broad objectives of the team like:

Gas discontinuation; ensuring residents understand the urgency to act towards climate change; building trust amongst residents; improving the awareness amongst residents about the energy transition.

### 1B



#### Define the specific design question/ problem/ content for contagion (the WHAT)

In order to brainstorm ideas, the overall goal needs to be narrowed down into specific aspects. The more the specific the design question, the better. This specific design question (or intent) shall become the 'content for contagion' or 'WHAT needs to be spread'.

After defining the overall goal, think of specific underlying aspects of the goal. Think of smaller problems that fuel the goal and need to be overcome. Are there specific perceptions or barriers that lead to inaction? As a group discuss these specific design questions / problems you want to tackle. Select 2-3 questions that you will target during this brainstorm session. Examples of specific problems could be:

Myths about technologies amongst residents, inability of citizens to visualise the future, negative past experiences of the residents, language barriers, loss/risk perceptions amongst residents.

### 1C



#### Translate the specific design question into HOW TO / HOW MIGHT WE questions

The next step is to convert the specific problem(s)/ design question(s) into 'How-to' or 'How might we' questions.

How-tos are problem statements written in the form of questions that support idea generation. Reformulating the problems into how-tos helps to gain a comprehensive overview of the problem and answer the question (generate ideas) more easily.

If the specific problem is related to myths about technologies, examples of How-tos / How might we are:

How might we curb the spread of myths? How to devise myth busters? How to ensure residents do not believe myths about the technological alternatives? How to ensure people do not create and spread myths about energy alternatives / gas discontinuation? How to ensure accurate comprehension about technology, costs and processes, to avoid myths?

### 1D



#### Identify the social contexts for contagion

In order to spread a behaviour within and across groups, there must be social interactions between different people. Thus, the social contexts of where these interactions take place (based on the social identities and social networks of the target group) need to be defined. The interventions need to be specifically designed for and seeded in these contexts to achieve successful contagion.

The social contexts of interactions between residents of a neighbourhood (where interventions should be designed for) could be:

Vicinity of the house, common areas (mailboxes, garbage area, car parking), Church, Gym, Community garden, School, Annual community meetings etc.

After defining the How-tos and social contexts, move to step 2 (Brainstorm ideas).

## STEP 2: BRAINSTORM IDEAS

Use Canvas 2 and Action, Spread Mechanism & Incentive inspiration cards for this step. Breakout into smaller teams of 2-3 participants.

Upon defining the specific design question / problem, the next step is to brainstorm ideas. At first, copy the How-to / How-might-we questions defined in step 1C in the space given on the canvas, such that they are easy to refer to.



### 2A Select and distribute inspiration cards amongst participants.

In order to make the process less overwhelming, it is advised to narrow down to relevant Action inspiration cards. As a team go through the category index cards of each Action category (Figure 5) and select the ones that you think can help in answering the specific design question (1C).

After selecting the category(s) distribute the listed strategy cards amongst all participants. Each participant can get 1-3 Action cards. Alternately, each participant can get 1 or 2 cards from each of the Action categories to ensure all routes of achieving a solution are covered during the brainstorm. Similarly, distribute the Spread mechanism and Incentive cards (1 - 3 cards per person). Note: **use both S1 & S2 spread mechanism categories and all incentive cards.** You do not need to make a selection for these.

Allot specific time for participants to go through their cards. Already write down the first ideas you have while reading the cards. Once everyone is done reading them, each participant can tell the others about the strategies they read in brief.

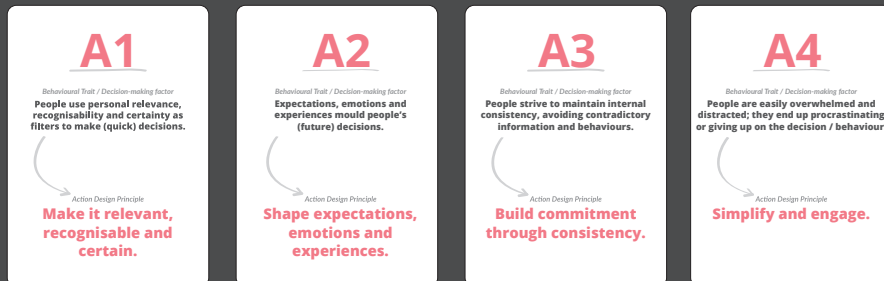


Figure 5: Action categories (Category index cards)



### 2B Brainstorm Ideas

Once each participant has discussed their cards, start the brainstorm session. Keep the design criteria, design principles & design component index cards in the centre or visible to all, such that they are easy to refer to.

Use the strategies you read to come up with ideas to answer the How-tos. You can think of any of these components; they don't need to form a single concept as yet. Consider this as a parking lot for all ideas - big, small, whacky, simple, elaborate. Keep the social contexts of interaction in mind while ideating.

Since the touchpoint cards include nudges and behavioural economic principles, which are more useful in making the concepts more effective, it is recommended to use them later in the process. However, they can also be used for inspiration in this phase, if the participants do not find it overwhelming.

To make the brainstorm more interesting, the cards can be rotated. Each participant gets one card for 40-60 seconds, where they brainstorm ideas related to that particular strategy and then pass it on. Ensure that the participants are already familiar with the strategies for this.

Figure 6 shows what the outcome of a brainstorm would look like.



Figure 6: An impression of what the outcome of a brainstorm session would look like.

## STEP 3: GENERATE CONCEPTS FOR CONTAGION

Use canvas 2 & 3 for this step; carry on in the breakout team.



### 3A Discuss ideas generated in step 2

Once everyone has put down all ideas, present (discuss) your ideas to the others in the smaller breakout team. Use the discussion to build upon each other's ideas and group similar ones.



### 3B Mix and match to generate concept lines

As a team, mix and match ideas and generate concrete concept lines – with all the components specified for each concept– Actions, Spread mechanisms and Incentives. Also list the key Touchpoints that are needed for the concept. Use the spaces provided in the canvas to create the concept lines with post-its from step 2 itself. Figure 7 outlines what the outcome of this step would look like.

## STEP 4: EVALUATE AND SELECT CONCEPTS

Use canvas 4 for this step. Do this step with the whole team (all participants).



### 4A Discuss concept lines generated in step 3

Each breakout team should present their concepts (3 best ones) to the other teams. Further, build upon each other's ideas, discuss pro's & con's, add / subtract details.



### 4B Define evaluation criteria

After discussing all concepts, define the (qualitative) evaluation criteria for concept selection based on the goal of the contagion, other constraints or the design principles (with the whole team). Examples of the evaluation criteria are:

How well do the concepts help in the goal of enabling comprehension of technology, costs, process? or overcoming myths?, Ease of implementation, Cost of implementation, Reach of the contagion (maximum spread), Locally relevant, Desirable, Triggers contagion etc.



### 4C Evaluate and shortlist concepts

Select one of the three concept evaluation/ selection methods outlined on canvas 4 - C-box, Dot voting, or Ranking. Use the selected method to evaluate the concepts and shortlist the high potentials. The top potentials can be taken forward to the detailing stage.



Figure 7: Impression of what the outcome of step 3 would look like.



## STEP 5: DETAIL THE SELECTED CONCEPTS

## SPACE FOR NOTES

Use canvas 5 for this step along with the Touchpoint inspiration cards. This step can be carried out in smaller teams (or the team which is assigned the task to take these concepts forward). This step includes the first round of detailing of the concept.



### 5A Visualise how the contagion will unfold

Use the given space to further refine and detail the concept. Think of 'Who will initiate the contagion/ Action? How, where and how often will the Action take place? To whom will the initiator spread the Action / behaviour? Why and how will they spread it?'



### 5B Detail the Touchpoints

Use the Touchpoint inspiration cards to detail / visualise all the touchpoints that will be used in the concept (to carry out the Action, spread the behaviour and incentives).

The touchpoint strategies build upon nudge theory and behavioural economics principles, that can help in making the touchpoints more effective (ensuring people pursue the behaviour). Incorporate as many of the strategies as you can to make the behaviour compelling.

After this round of detailing, the project team can prepare budgets, start prototyping and validating the concepts. These can undergo several rounds of iterations. The concepts can also be modeled using quantitative network simulation techniques to predict outcomes, based on the social contexts of the contagion (social networks of the target group).

Continue with the 'Seed the contagion, Evaluate and Iterate' steps (step 6) of the 'Design for social contagion framework'.

For more details on the thesis & toolkit, visit <https://repository.tudelft.nl/>, or  
send an email to [jeshah92@gmail.com](mailto:jeshah92@gmail.com)