The value of Futures thinking in designing for societal challenges

APPENDIX
Alicia Calderón González
MSc. Strategic Product Design
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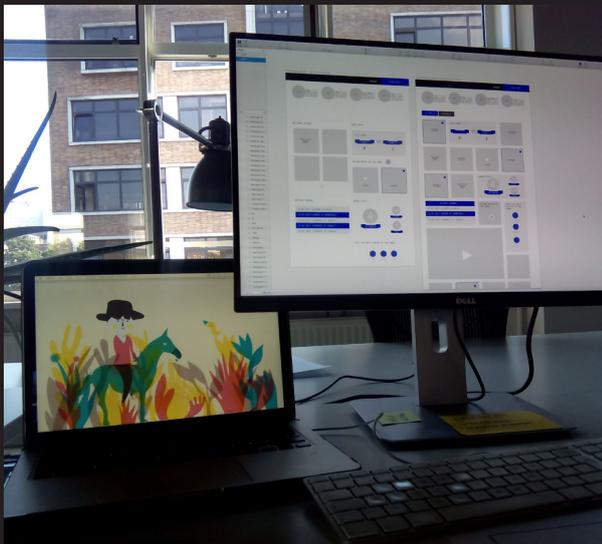Industrial Design Engineering

Oak & Morrow

TUDelft

Appendix content

Internship Report

Alicia Calderón González
Internship at Oak & Morrow

Personal goals

Motivation to do an Internship

As a MSc student in the faculty of Industrial Design Engineering I got to work with different companies in multiple projects. This allowed me already to learn more about the real functioning of the job of a designer. On the other hand, the projects we face in the masters are crafted by our professors (and with it, the deadlines and content of deliverables, the amount of contact with the company and the kind of information the briefing contains). This allows us as students to make the most out of each project, but creates certain distance with the real situations professional designers encounter in their relationship with clients and the development of the project. Because of that, it was important to me to experience the day to day of a design company before finishing my masters and looking for my first job as a professional designer.

With all the previously mentioned in mind, I wrote the following 'Personal goals' at the beginning of my internship:

- Test the knowledge about design acquired in my years as a student in a professional environment.

- Get to know the work dynamics of designers in design studios and check my fit within that kind of working environment.

- Have a close relationship with professional designers and learn from their experience of working in the industry.

- Learn more about my role as strategic designer within the design process.

- Learn more about the role of interaction designers within the design process.

- Experience and learn from the designer-client relationship in a professional environment.

- Work on real projects that inspire me and trigger my curiosity and passion about design.

The company: Oak & Morrow

My internship took place at the strategic design studio Oak & Morrow, based in Rotterdam, from the 1st of September to the 28th of February.

Company's expertise

Oak & Morrow is specialised in interaction and strategic design, including the design of new products, both physical and digital, brands and services. Their area of expertise includes branding, products, websites and apps design and development, design of interactives and smart products, E-commerce and omnichannel experiences, etc. Summarised, in their own words, they "design awesome interactive experiences between people and brands".

My experience of the company's internal culture

I did not know Oak & Morrow before my search for an Internship. It was through IDE's Internship opportunities website that I found out about the company. Already the text of their opening for an intern position differentiated them from all the ones I had read by other companies; it showed a sense of humour and it was one of the few I had read that sounded personal instead of automated or boring. It was later, when I checked their website, that I got a further sense of their personality as a company. Their mission and manifesto shows again that sense of humour and human touch, next to their focus on adding value with their work and their aim to nurture their curiosity. These characteristics are also part of what I have experienced in my time there as an intern. The internal culture that I could observe is one of enjoying their work and sharing their passions, trying to make the best out of every project and aiming for more and better each and every time. I did not give much thought about all this during my time there as an intern, but when reflecting back on it, I can see that the company has a quite defined internal culture; of course the fact that they are a small

team could help this.

Interaction and Visual design

A characteristic of the studio is also that most of their projects have two sides: an interaction focused one and a visual one. Depending on the project these two part happen on separate moments or are interconnected. For some projects, the interaction design has been executed first and all the choices to be made in that part are done before the design of the visual aspects starts. In those situations, it was interesting to observe the importance and value of communication between the interaction designer and the visual designer that would continue the project. It is not always possible that both interaction and visual designer can work on one project at the same time, discussing the decisions to take on the spot. For my internship experience, it was interesting to observe first hand the functioning of this kind of projects, as I never had the chance during my studies to work with visual designers, therefore never had the responsibility to transfer all my design choices to another designer that would have to execute a big part of the project.

Client projects and Dream projects

Another important feature of the studio's personality is their distribution of working hours between client projects and 'dream projects'. The second ones are projects that start from the team's curiosity on a topic, or from a personal idea or dream of seeing something realised. This concept seemed great to me; as a professional designer, still being able to work on projects that are motivated by your own curiosity as well as on commercial ones. Next to that, it is remarkable

how the studio aims to give these dream projects also a commercial exit; to me it sounds like the perfect 'business model' for a happy and inspiring work life.

Oak & Morrow's design process

One of the most enriching aspects of the internship, as a design student, was to be able to check what design process professional designers actually use. So much is discussed at school about design methodology, tools and processes that it can cause us students, at times, an overload of information regarding how to approach a project. In the last two years I have tackled design projects in many different ways, but I have not been able to craft and perfect a personal process out of practice. The designers at Oak & Morrow I could work next to have put together the tools and methods that best apply to their expertise and kind of projects, creating a distinct design process. Being able to learn more about their process was especially interesting at this point of my studies, as I am facing the start of my graduation and I will have to make a lot of decisions on how to approach a six-month project and how I will structure that design process.

Moreover, I was invited to participate in workshops with clients, which were the perfect scenario to learn more about Oak & Morrow's design process. It was a new experience to be able to work hand in hand, at least for a couple of hours, with a client. Previously I had only been part of projects where communication with the client was not much more than a couple feedback sessions, once results had been already produced. Working as much as possible with the client is a practice common to

Agile or Scrum, methods that Oak & Morrow uses in the development of websites or apps when collaborating with developers of other companies. This was another interesting aspect to observe in their design process, the collaboration with developers in a project under the Scrum method. I was able to be present in one of the dates where the designers from Oak & Morrow worked at the developers' company, during one of the Scrum 'sprints'. Not only that, one of the interaction designers of the studio, Esther Toet, gave me a lesson on the Scrum method, that made it easier to understand the development of that kind of projects. That experience next to comments from the designers of the studio was crucial for me to see the challenges and positive aspects of close collaboration with other professionals and the client in a project.

Tasks performed during the internship

During the internship I was involved in multiple projects of different characteristics, what was great to test my abilities and learn new things. From sketching wireframes for the first time to doing research on competition, my tasks varied a lot per project. In the following text I explain the characteristics of each project and my involvement in it.

Projects
*Project names are not shown due to these not being made public yet.

Project 1

Project: Develop the new website for a big hardware store chain in the Netherlands. Oak & Morrow worked on not only the design of the website but also strategy, branding, retail and marketing for the company.

Involvement as an intern: Through this project the interaction designers at Oak & Morrow introduce me to website design, explained me the basics of it and let me practise by proposing the interaction design of parts of the website or designing certain pages of the website with them. The tasks I did related with this client's website are: checking their old website to list the different parts of it and the kind of products and categories we had to take into account for the website, thinking about the interaction of the user with the website, proposing a possible flow for the website, sketching basic wireframes of the website, translating those proposed wireframes to a digital format.

Apart from that, I could see during my time as an intern the different development stages of this project, going from the design and presentation of the Customer Journey, to the development of a framework to explain their target customers to the in depth design of the website pages with developers and visual designer.

Project 2

Project: Inspired in a personal project of Jeroen van Geel, this project is a website that allows companies to create virtual cards and organise them in different decks to be displayed under a domain of their own that their customers can visit. The cards are used by visitors of the website as a collecting game and can be applied to many different topics. The target companies are museums, nature associations, cities, etc.

Involvement as an intern: Thinking about the interaction of the user with the game-website, sketching of wireframes of website and basic digitisation on Sketch.

During my time as an intern I could see the different stages of the project, starting with the design of the flow of the website to have the overview of all the different pages that have to be created and the interaction of the user with each of them. Then the wireframes of each page are sketched to later on be digitised in the Sketch software. These files are used by the visual designers to create the look of the pages. (Already in the early stages of the project it is important to have visual examples of the first ideas to present to clients.) After the visual style of all the pages of the product is created by the visual designers, an external team of developers starts to create the backend of the website.

External Communication of Oak & Morrow

Project: The whole team of Oak & Morrow has been recently rethinking the way they communicate their brand through their website, social media platforms, etc. As part of this project, a new Oak & Morrow website with new content is being developed by the studio.

Involvement as an intern: Briefly researching what are similar companies of the industry doing regarding their communication and presenting some personal suggestions on what of that can be applied as well to Oak & Morrow, thinking about the different communication products that we could create and the means and frequency of publishment, helping in the writing of new content for the website.

Design process of Oak & Morrow

Project: As mentioned earlier in the report, Oak & Morrow works with their own design process, developed through their experience with projects and clients. It is common in design studios and agencies that the tools and methods used or developed by the company are given a branded format to offer a more professional experience to clients and be able to market themselves better. This is the intention of the project, to develop an Oak & Morrow branded method that shows their design process.

Involvement as an intern: Being involved in a session with part of the studio's team to map their process and think how to structure it, filling in a file that shows the structure of the method agreed on the session and the different tools used by design question or objective, making a folder with documentation about the different tools the studio uses or has created along the way.

Project 3

Project: One of the 'dream projects' of the studio, this is an ongoing project that the designers at Oak & Morrow have been developing in the last years. During my time as an intern, the main aim of the studio was to make it ready for its publication and to set a small production line.

Involvement as an intern: Helping in the development of the prototype by: creating 3D models, to be later 3D printed, of the drawings made by the designers at the studio, looking for providers for the different parts of the prototype. Other tasks: proposing different ideas for the product's website in basic hand-made or digital sketches, making a list of the influencing people to whom it would be interesting to send the product.

Project 4

Project: A client approached Oak & Morrow with a personal project about a new way of keeping and sharing people's life stories. The client wants to develop a first product to test it

and in the future create a company around it to grow the concept.

Involvement as an intern: As an intern, I could follow the first part of the project: creating a minimum viable product (m.v.p.), in the shape of a website and a printed product. Because the initial idea was in its most basic state, I could see how the designers at the studio worked on a project from scratch; starting by doing research and conducting a 'Brand Key session' with the client where the specifics would be defined. After that, they created two possible concepts and presented them to the client in another session, where the final concept was decided. The studio's designers continued working in this concept by creating an m.v.p. in its most basic form, in collaboration with the client, to test it with users belonging to the target group. Next to that, a 'Business Model session' was held to define how the product would be financially profitable.

Next to being invited to participate in the Brand Key and Business Model sessions, my tasks were: validating through research if there was a need for such a product and what would be the best target group, researching for products related with the client's idea and the characteristics of the possible competition, looking for inspiration for the content of the basic m.v.p., helping in writing small content related with the test of the m.v.p., proposing ideas in wireframes sketches on how the digital product or website would work and collect, structure and display content.

Internal research project

Project: In the last month of my internship I was assigned to research about topics that the studio is curious about. With the designers at Oak & Morrow, we defined some initial research questions or topics that I would later on dive in and propose further research questions. Every few weeks I presented the results of my research per group of research questions. The ultimate goal was to create content related with the topic that the studio could share, such us examples of possible design interventions or articles.

The overall topic of the research was Human Behaviour and the deep-rooted reasons of why we develop certain behaviours. The initial research questions proposed by the Oak & Morrow designers were 'Why people behave so distant with the space and each other in public and transit spaces?' and 'Why do we tend to avoid close contact with neighbours and colleagues?'.

Approach: To face the research I looked for the basic idea of each of this questions, that for me was 'what are the reasons of certain acquired behaviours?', and the root of that, 'why do we acquire behaviours that we automatically repeat?'. In this line of research I presented some conclusions and ideas for interventions. Based on these ideas we brainstormed about new ones and possible content for the articles. As a result of the project, I wrote three articles destined to be part of the 'Journal' of Oak & Morrow's website, where they usually share content the studio is interested about.

My internship mentor, Sophia Altekamp, and I at the studio of Oak & Morrow.

Sophia (interaction designer) updating Valerie (visual designer) and me on Project 3.

Experiences and insights gained

Reflecting back on my 'personal goals' for the internship

It seemed like an interesting exercise to go back to the personal goals I wrote at the beginning of the internship and see which ones I feel I have fulfilled and what things would be interesting to keep exploring. My personal goals were:

'Test the knowledge about design acquired in my years as a student in a professional environment.'

The internship definitely helped me test my knowledge; at some points I felt completely comfortable with the task at hand and other times it was completely out of my expertise. I think, specially within the expertise of design, it is complicated to test all you have learned, or to never feel like you still have a lot to learn. As students we always feel like we lack design abilities, and when we gain those we thought we needed, there is new things to learn. Design expertise is such a broad concept that I get the feeling this will not change once I am working. Regarding the knowledge I already had, the internship definitely helped in testing it in a real environment and, more important, figure out my limitations as a designer and the main learning objectives I should focus on.

'Get to know the work dynamics of designers in design studios and check my fit within that kind of working environment.'

With the internship at Oak & Morrow I learned a lot about the functions and dynamics of a design studio; see the benefits and also the challenges of this working environment. Simultaneously, and probably because most of my designer friends are facing work life, I have had many conversations during these months about the differences of a designer's work experience in design studios and big companies. All this made me reflect on the fit of my personality and career objectives in the different possible workplaces I can aim to as a designer and so far I think I would prefer to work in a small to medium design studio.

'Have a close relationship with professional designers to learn from their experience in working in the industry.'

I was very lucky with doing my internship at Oak & Morrow regarding this goal. The studio has a small team, what allows an intern to really get a glimpse of everybody's tasks and work. Not only that, my mentors at Oak & Morrow included me as much as they could in the current projects of the company, so I got to work with them on many occasions. Moreover, the tasks I was assigned were always things that a professional designer would have had to do anyways, what gives you the opportunity of getting a good idea of what it is like to do their work.

'Learn more about my role as strategic designer within the design process.'

Because of my MSc being focused on Strategic Design, the projects we are assigned at school usually only cover those parts, so it is difficult to get the real picture of the role of strategic design within a whole project. It is thanks to the JMP project and the experience of this internship that I could check the value and role of the strategic designer within the entire design process. The internship specially gave me clarity about the specific need of Strategic Design within the process, because I could follow the development of various projects very different from each other.

'Learn more about the role of interaction designers within the design process'

Definitely one of the strong points of

my internship experience was being in a design studio with expertise on interaction design and where I could follow the development of interactive products such as websites. This kind of projects are complete new to me and there is still a lot of knowledge and skills that I have to gain in the area of interaction design. It was great to test these limitations of my education but also to learn what Interaction Designers exactly do within the design process.

'Experience and learn from the relationship designer-client in a professional environment.'

Handling clients and their requirements and expectations is a big part of a designer's work for what we are not trained enough at school. During my internship I could learn more about all these challenges and see how professional designers handle them; communication with the client, changes in the initial briefing, handling deadlines to receive content from them or third parties and establishing the power boundaries on the project are some of the challenges I have been able to observe.

'Work in real projects that inspire me and trigger my curiosity and passion about design.'

Regarding this goal, it was great to see that busy professional designers could still allocate some of their working hours to projects that came from their own curiosity, or 'dream projects' as the team of Oak & Morrow calls it. Next to that, I could participate in client projects at the studio where already the briefing or topic was exciting and did inspire me as a designer. On a more negative note, I realised that the freedom we are given at school projects is rarely experienced in the industry.

Personal experiences

Teamwork

We talk a lot about the challenges and good practices of teamwork and multidisciplinary teams at different courses of my masters and almost every project is done within a 3 to 6 people team. Therefore it was interesting to see that all the theory we had been taught and practised at class about working in a group was indeed applicable to the professional world. For example, I could observe how also professional design teams can have difficulties to 'align thoughts' regarding a project (something discussed at class), meaning that is taught to keep everybody on the same page during a project.

Regarding disciplinary teams, although the team at Oak & Morrow are all designers, it was really interesting to do an internship at a studio where there is a combination of visual and interaction design to observe how these collaborate and build on top of each other at different stages of a project. Also a good chance to check the theories learned at school on communication between professionals of different expertise. An example of a challenge I could observe when both visual and interaction designers work together on a project, but at separate stages, is that the reasoning of the decisions taken in the initial state of the project can be not completely understood by the designer that takes over it at a later stage.

Out of my comfort zone

(A.k.a. those moments when my tasks felt out of what I have been training in the last years of my studies.)
These experiences were great, probably some of the worst and best moments of the internship, because they made me feel useless at times, but also allowed me to know more about the limitations of my knowledge and abilities as a designer and to train how to cope with those moments.

As a reflection exercise I listed all the things that made me feel uncomfortable or challenged as a designer and what I learned from those situations:

Interaction design and digital products:
The internship has felt in a way like a speedy master on interaction design, as I have learned for the first time many concepts related with it and specially with the interaction design

of websites. Designing for digital is definitely something I have to practise and learn more about and, although thinking about the interaction design of a website made me feel like I was back at first year of university, it was very refreshing and sparked my curiosity as a designer. I can now appreciate way better every site I visit!

Fast ideation:
The previous year and a half to my internship, I have been training how to take design decisions only based on reasoning and quantitative or qualitative data. For the school projects, although we have been forced to generate fast ideas, they were with a pre-defined objective and multiple constraints (and only on the strategic, abstract level). This, although very realistic and applicable, has caused me to lose practise on wild brainstorming, also a very practical ability as a designer. During my internship, I could check in multiple times how this skill is something I should not forget to train.

Pitching to "colleagues":
When working in groups for projects at IDE, we usually assign different tasks to each group member and present the results of that work in the group meetings. This presentations are done in a very colloquial way and the objective is to put the other members of the team up to date with the work done as fast as possible. This practice worked against me during my internship, specially in the presentation of the 'Internal research project', where I was advised by my mentors to take every presentation as a pitching moment. Such an obvious thing that I had not at all in mind! It was a good lesson to take with me for every future project and presentation; don't underestimate the importance of pitching your work to colleagues.

Final thoughts

Probably the one core reason why I wanted to do an internship, was to get a first hand experience of what the work of a designer in the industry was really like. Not only was I able to learn about that, but it was also very interesting to be surrounded by professionals with lots of passion for design because it put me in a mental state of constant self reflection about why

I want to commit to this profession and how I would like to approach the future of my career. This inspiration to rethink why I want to be a professional designer and what kind of projects I would like to do was definitely an unexpected but great secondary effect of the internship.

Appendix B. Contexmapping session with Oak & Morrow

Defining the type of projects that are meaningful for Oak & Morrow

The theory of Generative Design Research on Contexmapping (Sanders & Stappers, 2012) was followed to facilitate a Contextmapping session.

The session is facilitated by the Graduation student and the participants are professional designers from Oak & Morrow, as well as the clients of the Graduation project. The main constraint of the session is time and people (as the total time of the session is 90 minutes and the student is the only researcher to conduct and analyse the results.)

Goal of the session

The goal of the session was twofold:

- *Defining the type of projects that Oak & Morrow is interested in related with city making, urban and social problems. Because a project can be defined in multiple ways, in the session the concepts of 'Scope', 'Scale', 'Topic' and 'Values' are introduced as a way to structure the thinking and answers of the participants. This is meant, as well, to ease the further analysis of the information generated in the session. The research paper 'The triple layered business model canvas' (Joyce & Paquin, 2016) was used as inspiration and source of comparison to check that the different aspects that define a project were included in the concepts proposed. The paper proposes two new layers to the original Business Model Canvas (Osterwalder & Pigneur, 2010), that deal with environmental and social issues of the business model, contemplating what every project entails from different perspectives.*
-
- *Setting requirements for projects to be significant for Oak & Morrow. These requirements are meant to be the conclusion or summary of the session.*

The participants

The session is held with the participation of Jeroen van Geel, one of the two founders of Oak & Morrow, and Sophia Altekamp, interaction designer of the studio. Because of their background, both have experience in participating and conducting creative workshops and sessions with different stakeholders, and are used to work together on achieving agreements and conclusions. They share a common understanding of the culture of the company. The limitations of this shared understanding are to be tested as well in the session.

Set-up of the session

Structure of the session

0. Sensitizing

As a preparation for the session, the participants are sent an email and set of cards that contains six statements and they are asked to read two per day and think about their agreement or disagreement with the statement and how they would improve it. (The participants are asked to rewrite the statement in the way that best explains their truth.) The statements are written with the aim of sparking in the participants the thinking about what would be the ideal project for Oak & Morrow related with city making or urban and social problems.

The introductory letter sent to the participants and the statements can be found in Appendixes.

Part 1: Aligning mindsets

Reflecting on the statements or probes of the sensitizing cards: What does Oak & Morrow stand for as design studio and what is the interest of the studio on projects related with city making?

Part 2: Defining the type of projects with visual triggers

Four aspects that help structure the defining of a project are used during the session; these are expressed as: 'Scope', 'Scale', 'Topic' and 'Values'. The participants are given examples of possible projects, referred as Case Examples, and are asked to choose the one to talk further about and point out 'What is interesting from them for Oak & Morrow? What is not? Why?' in relation to the aspect being discussed. Next to that, they are given a Working Sheet, where they can create an artifact with the 'collaging toolkit' to illustrate the answers to the questions proposed (the questions are aimed to inspire their answers about each aspect, e.g. 'Scope', but is not mandatory for the participants to create an answer for them all). The participants are given a different Working Sheet per aspect. This produces eight different artifacts by the end of the session.

Case Examples:
- *City Swipe*
- *WalkNYC*
- *London's portable "Parklet"*
- *Bus stop moves*
- *Walk[YourCity].org*

The group of projects used as a Case Examples have been selected with the thought of creating a diverse sample in Scope, Scale, Topic and Values. Next to that, all of them intend to tackle a, somewhat, wicked problem (promoting healthier habits among citizens, creating awareness on city pollution, etc.)

The Case Examples posters, next to the Working Sheet can be found in this Appendix.

Having in mind an imaginary ideal project that the studio would be enthusiastic to undertake in the near future, the Oak & Morrow designers are asked to come up with an artifact for each of the topics Scope, Scale, Topic, Values. In this exercise, the participants are offered a poster with different Questions per topic and material for creating collages. The objective of the Question posters is, on one hand to explain further what the concept of each topic refers to, and on the other hand to serve as inspiration for the participants in case they find difficulties to start creating the artifact. (Answering the questions in the artifact is not mandatory.)

The posters with Questions per topic and artifacts produced by the participants can be found in this Appendix.

Part 3: Setting requirements

In the convergent part of the session the participants are asked to summarise the points of most importance, discussed in Part 2 and 3, that make for the requirements that a project dealing with city making had to fulfill to be undertaken by Oak & Morrow. Once the requirements are listed, only four of these are selected and ranked on level of importance. The aim of this exercise is to influence the participants to prioritise and make choices, next to reflect on the main takeaways from the session and wrap up. These requirements also constitute a good help for the student to validate the insights generated with the analysis of the artifacts and transcripts of the session.

The Requirements poster used in this part of the session can be found in this Appendix.

Material for the session

- *Time schedule*
- *Preliminary mapping*
- *Printed example Cases: the Cases are shown in a poster that includes visuals of the outcome and context of the project, what was the problem to be solved or brief, the client and a brief explanation of the solution.*
- *Collaging toolkit to build the artifacts*
- *Working sheets for Part 2 (one working sheet per theme, four working sheets in total)*
- *Requirements poster*
- *Sensitizing cards: Statements on what Oak & Morrow stands for in relation to their projects interests. (six statements for three days)*
- *Post its, A3s, pens, scissors and glue*

Time schedule
(Total time: 90 min.)
Introduction and explanation of session's structure and goal - 5 min.
Part 1: Aligning mindsets - 10 min.
Part 2: Defining the type of projects with visual triggers - 60 min
Part 3: Setting requirements - 15 min.

Sensitizing material

Oak & Morrow is most interested in working with small-size, public-nature clients (companies or institutions involved in some way in City Making) that partner for their operations with multiple stakeholders.

Oak & Morrow is most interested in working with ...., ... clients (companies or institutions involved in some way in City Making) that...

1

Oak & Morrow is most interested in projects that allow the designers to research on people's specific needs regarding their everyday urban lives.

Oak & Morrow is most interested in projects that allow the designers to research on...

2

Oak & Morrow is most interested in projects that tackle wicked or systemic problems of institutions related with urban areas.

Oak & Morrow is most interested in projects that tackle...

3

Oak & Morrow is interested in having a one-time relationship with the client of the City Making project.

Oak & Morrow is interested in having a .... relationship with the client of the City Making project.

4

Oak and Morrow is most interested in working in City Making projects that are within the topics of 1. "Transport and transit", 2. "Civic life", 3. "Tech implementation".

Oak and Morrow is most interested in working in City Making projects that are within the topics of
1. ....
2. ....
3. ....

5

Oak & Morrow is most interested in working with clients that aim to create a meaningful, positive impact on their customers.

Oak & Morrow is most interested in working with clients that aim to create .... on ....

6

Sensitizing material introductory letter

Dear Sophia,

This brief is the first step of the Discussion Session, by reading and filling it in you will prepare yourself to be as insightful as possible in next Thursday's session.

*The goal of the Discussion Session is to define **what type of projects related with 'City making' are of most interest for Oak & Morrow**, next to the kind of roles that the studio would like to play in the overall 'City making' process.*

This is all you need to know:
- *Inside the brief, you will find 6 cards that contain a statement. These will make you reflect on topics that are part of the session, setting you in the right mindset for it some days in advance.*

- *Take each day 2 cards; read the statements and think if they match with your own truth or opinion. If they do not, feel free to cross out, add or change whatever you want so that it expresses what is for you a right statement.*

- *The statements have not been written to be right or wrong, simply to elicit thoughts on you, so your own interpretation of them is the one you should take into account. (In case you do not understand one of them and you cannot figure out your own interpretation of it, feel free to ask me about it.)*

<u>One more thing:</u> It is important that you read 2 cards each of the 3 days instead of going through it all the last day. If possible, do this exercise before of after work, at a place where you feel comfortable and with a relaxed state of mind. Feel free to alter the cards in any way, if you want to make doodles on them or cut one in little pieces to express your disagreement with the statement, please do so.

Thanks so much for your participation in the Discussion Session and help with the project!

Case examples

WalkNYC

Who:
Agency: City ID
Client: New York City Department of Transportation

What: In the most significant information design project to be undertaken in New York City in a generation, the NYC Department of Transportation appointed PentaCityGroup, led by City ID, to develop a citywide standardised wayfinding system. WalkNYC is designed to help the 8.5 million residents and 50 million annual visitors to walk, bike and use public transit by presenting new types of information with a unified visual language. The system is designed to enable seamless journeys, with all products featuring a consistent identity inspired by NYC and its iconic subway system.

Bus stop moves

Do you wish it was easier to fit fitness into your daily routine? Of course! We all do. And now you can. Introducing Bus Stop Moves, where whether you have five or twenty minutes until the next GCRTA bus, you can make a positive impact on your health.

Bus Stop Moves' mission is to increase opportunities to move healthy and improve peoples' perceptions about the "right" place to exercise by putting the resource out in the public on canvases that already exist.

Who: Community activists launched the Bus Stop Moves program in Fall 2015 with partners at The MetroHealth System and through the GCRTA's Adopt-A-Shelter program. (Cleveland, USA)

What: Translucent vinyl adhesive wraps illustrated with simple exercises and health tips cover four glass panels of each bus shelter in the program. The moves are meant for anyone of reasonable mobility to do in "street" clothes, on your way to work or school. Some of the moves can be performed sitting down, and all can be modified.

London's portable "Parklet"

"The London and Liverpool-based studio was tasked with creating a mobile micro-green space that could replace two car parking spaces, and raise awareness of pollution in London.

The bench and planter sections have been constructed to be adaptable to a variety of different locations, and can be scaled up or down depending on the space available.

An on-site air quality monitor sends data back to an app and website, and is part of Kings College London's network of data collection points. The parklet opened on 20 November 2015 and is the first project to be delivered as part of Transport for London's Future Streets Incubator fund."
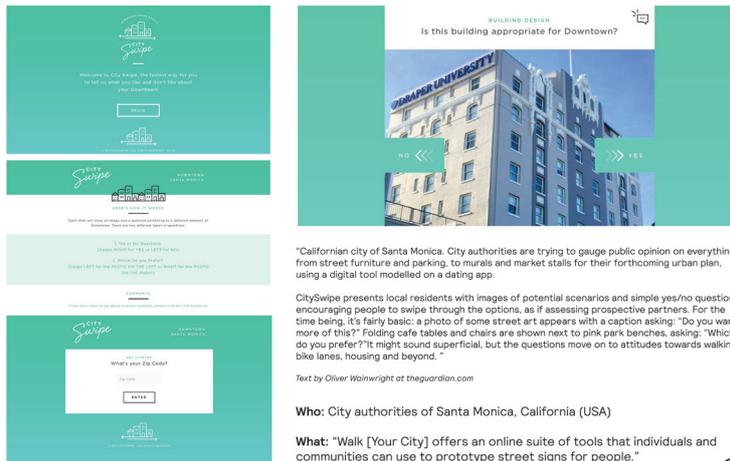
Text by Emma Tucker at dezeen.com

Who: Design collective WMB Studio

What: A miniature modular park that monitors air quality and offers plant-covered seating for passersby.

CitySwipe

"Californian city of Santa Monica. City authorities are trying to gauge public opinion on everything from street furniture and parking, to murals and market stalls for their forthcoming urban plan, using a digital tool modelled on a dating app.

CitySwipe presents local residents with images of potential scenarios and simple yes/no questions, encouraging people to swipe through the options, as if assessing prospective partners. For the time being, it's fairly basic: a photo of some street art appears with a caption asking: "Do you want more of this?" Folding cafe tables and chairs are shown next to pink park benches, asking: "Which do you prefer?" It might sound superficial, but the questions move on to attitudes towards walking, bike lanes, housing and beyond. "
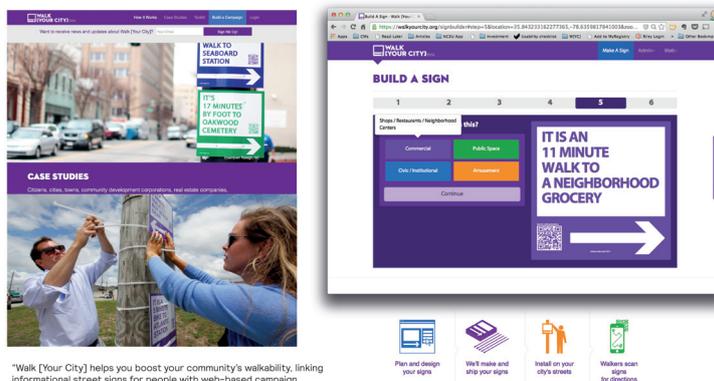
Text by Oliver Wainwright at theguardian.com

Who: City authorities of Santa Monica, California (USA)

What: "Walk [Your City] offers an online suite of tools that individuals and communities can use to prototype street signs for people."

Walk[YourCity].org

"Walk [Your City] helps you boost your community's walkability, linking informational street signs for people with web-based campaign management and data collection to complement traditional approaches to wayfinding.

Citizens, cities, towns, community development corporations, real estate companies, and more are already using our Sign Builder to design and install campaigns to embrace walkability in their communities."

Text by Walk [your city] at walkyourcity.org

Who: Walk [Your City]

What: "Walk [Your City] offers an online suite of tools that individuals and communities can use to prototype street signs for people."

Posters with questions per topic

scale

- What other **stakeholders** would be involved in these projects?

- What would be the **depth and breadth** of the relationship Oak & Morrow would build with the stakeholders of this project?

- What amount of (human) **resources** would Oak & Morrow put in this project?

- What other **partnerships** would Oak & Morrow make for the project?

- What is the **geographical impact** outreach of this project? (local, regional, global focus, etc.)

scope

- What kind of **client** would Oak & Morrow work for in this project?

- Who would be the **users** or target group of this project? Who would Oak & Morrow design for?

- What is the **role** of Oak & Morrow in the project?

- What are the main **objectives** of the project? What is to be designed?

- What kind of design **expertise** is executed by the designers at Oak & Morrow in this project?

topic

- What kind of **topics** related with City Making are more interesting for Oak & Morrow?

e.g. socio-cultural, environmental, political, technological.

examples of themes:

transport   poverty
                          mass transit
        tech
          commutes
                          energy use
   streets
             city branding
housing
                     civic life
        infrastructure
   waste   aging
             schools
        work
                policing
economic development   crime

values

- What **social value** (benefits) would Oak & Morrow aim to generate for its stakeholders and society with this project?

- What **emotions** would Oak & Morrow aim to elicit from its stakeholders (client, users, etc.) with this project?

- What are Oak & Morrow's **values** as an organization?

Working sheets

working sheet ✎ _____

Collaging toolkit

Effort	INTERACTION	Motivation	Participation	Tiring
Happiness	Goals	Evaluation	Giving	Analyse
Team	AMBITION	Network	Dreams	KNOWLEDGE
Frustration	Share	Privacy	Learn	Social
Satisfaction	Surprise	Listen	Authenticity	Community
SUPPORT	EMPATHY	DISCUSS	Communication	Data
Work	Difficult	Receiving	Achieve	Meeting
Purpose	Glad	Loneliness	MOMENT	Information
Anger	PUBLIC	Needs	Mutual	Deadline
Connect	Purpose	Awareness	Advice	Concentrate
Stress	Balance	Relax	Responsibility	Results
Personal	Feel	Self	Impact	Method
Focus	FEARS	Dialogue	Isolation	DISTRACTION
Understanding	DISAGREEMENT	Request	Influence	Inspiration

discover	measure	GOAL
call...	hear	sh---are
learn	colleagues	outreach
ANALYSE	prototyping	literature
office	explore	methods
TEST	"reference"	research
examine	friends	books
probe	results	COMPUTER
check	stakeholder	DEADline
dropbox	target group	Google
write	company	search
release->	laboratory	distraction
outreach	PUBLICATE	focus
pass further	control	inspiration
internet	LIBRARY	workflow
discuss	home	change
numbers	DATA	communicate
collaborate	contact	evaluate
family	"quotes"	read
assessment	¿questions?	user
JUDGE	freedom	

Requirements list

☞ **requirements**

✓ _____

✓ _____

✓ _____

✓ _____

✓ _____

✓ _____

1 _____

2 _____

3 _____

4 _____

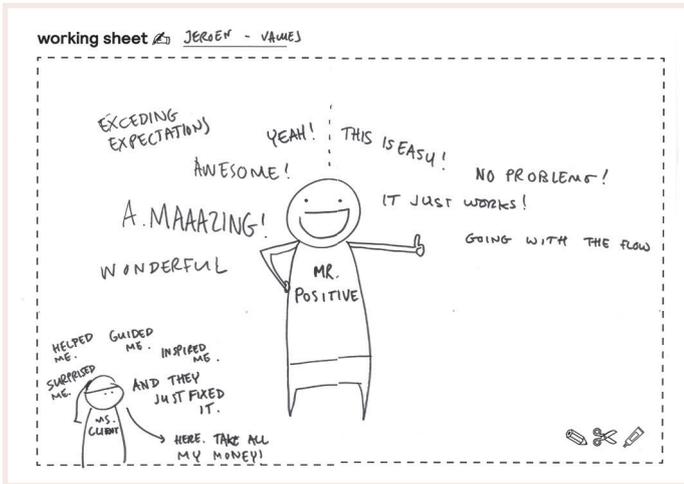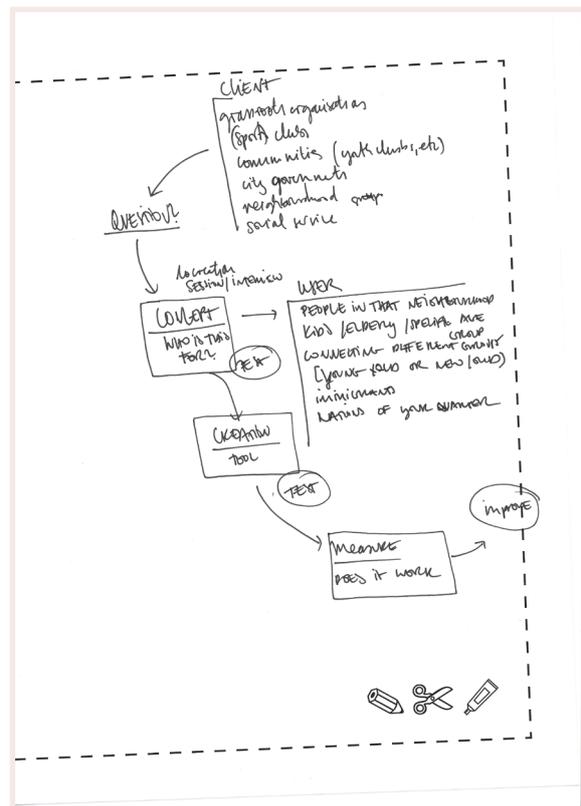# Results of the session - artifacts of the participants:

working sheet ✎ SOPHIA

working sheet ✎ JEROEN Scale

PSYCHOLOGISTS   RESEARCHERS (O&M?)

DESIGNERS   other SPECIALISTS
O&M

LOCAL GOV'S   LOCAL SHOPS

CITIZENS

1 TEAM
MISSION
VISION

CO-CREATE — CLOSELY
WORK
TOGETHER

FOR CASTING
POSITIVE IMPACT

DOES IT GENERATE
POSITIVE IMPACT

NO
|
YES
|
USER CENTERED
|
YES
|
NICE CLIENT
|
YES ———— GO FOR IT!

STRATEGY   SERVICE/
~~SERVICE~~   PRODUCT

WHAT'S OUR ROLE
|
OH YEAH...
|
BUDGET FIRST
|

CLIENT
grassroots organisations
sports clubs
communities (youth clubs, etc)
city governments
neighbourhood groups
social service

QUESTION!

co-creation session/interview

CONCEPT
who's in that tool?

USER
people in that neighbourhood
kids/elderly/special need
connecting different group
(young/old or new/old)
involvement
natives of your quarter

TEST

CREATION
tool

TEST

MEASURE
does it work

improve

28

Transcripts of the Contextmapping session:

Theme: Scope
Case: Walk[YourCtiy].org

Jeroen: "This is for me a tool to explore...it's like 'Explore cards', so, the is something interesting in any neighbourhood, what is there that you can discover? If I visit Edinburgh or Manchester I always get this top 10 museum list and I actually want to visit the things that people find interesting"

Sophia: "Our role in the project could be that, either somebody comes with this idea, like an organisation, and they are like, oh, we want to have this idea designed, we need a website, where they can make the sign… We make the website, we help them with that, could be, and develop the idea further, but could also be that a city approaches you or a sports club for example or like a community and says, we wanna change something here, and we(client) really want people to be more active, or more healthy, or we want them to get in touch with each other, and then we (Oak & Morrow) could come up with the concept of making the sign and say, why don't we encourage people to make this signs and walk out, and they can do it themselves, we build the website, but we also put some (signs) up already, we build routes… so that could be our role..."

Jeoren: "Yeah, but especially the type of client that comes to you, for example, I am also thinking on the Hospital, or an elderly care in cities, and they come in and say hey we really have a lot of negative feedback from people that simply cannot find their route.."

Sophia: "But also the city itself, I think that Bielefeld for example, there it is exactly… that is the question, the city says 'how can we make this community, this neighbourhood nicer', right now there is just a lot of problems there, how can we create the feeling that people have that actually like the place they live, how can we bring something more positive there…"

Jeroen: "POSITIVE! That's an important word"

Sophia: (Talking about possible clients for this type of project) "And I think the sports club also, because this is also with the active, you know, the health element, what you said, so that could possibly a client"

Jeroen: "They want to have a positive impact, and impact (laughter), and mainly the smart, iterative problem solving question, so this type of question is a service design question but if you make it more concrete then is also just a 'let's create something', kind of question. This is not a 'million dollar project', this is the type of project like, 'hey, we've got ten thousands euros, and we have this problem, can you help us out?', that is also what I like about this, is very hands on and we are, we always like the hands on solution, that should be scalable, so those types of clients…"

Sophia: "And I think to core things, is about the enabling people to do things themselves, because that's it, it's like a tool, and it's about improving people's lives, whether is being more active or more in touch with each other or get to know more your neighbourhood, that's again the positive impact…, but, from the center of 'how can you help them?'"

Notes on the poster of the case (post-its):

- Idea + website (<-- Oak & Morrow)
- Explore cards
- Community approaches you, this is O&M solution
- A city could also be our client for a project like this
- POSITIVE
- Hands on that is scalable
- We like that is about improving people's lives
- Solution hands on to project

Artefacts
<u>Sophia</u>
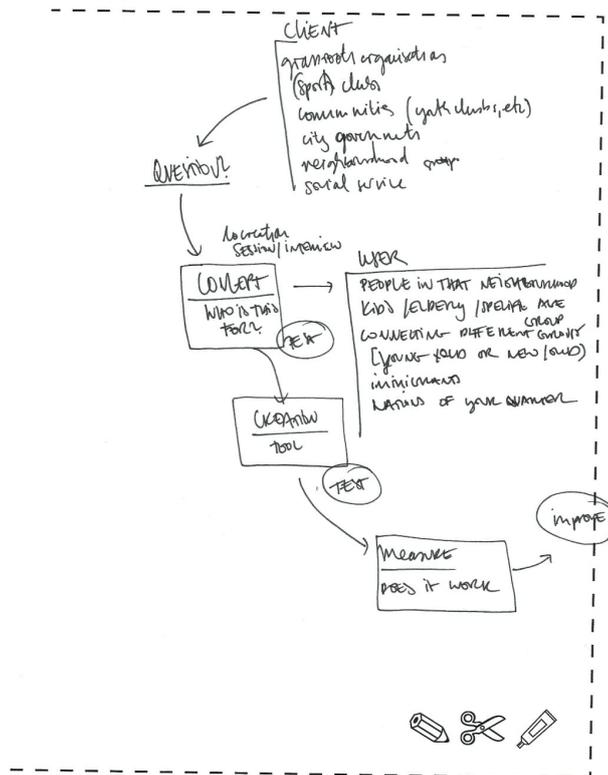
"Client→ Question→Concept(→User, who is this for?)[Test]→Creation[Test]→Measure, does it work?→Improve"
"Client: - grassroots organisation - (sports) club - communities (youth clubs, etc.) - city government - neighbourhood groups - social service"
"User: People in that neighbourhood, kid, elderly, connecting different groups: young + old, new + old, immigrants, nations of your

Jeroen
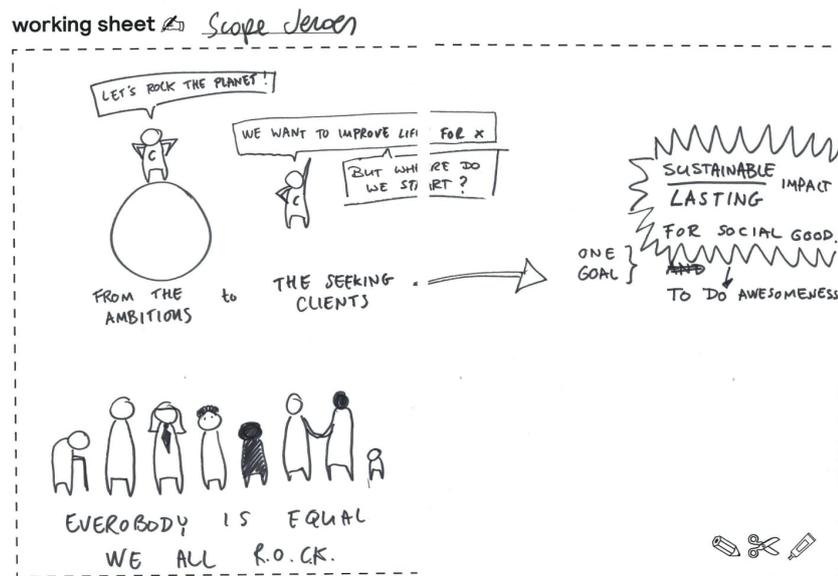
"Client: Let's rock the planet! We want to improve life for X, but where do we start?"
(Referring to the client) From the ambitious to the seeking clients → one goal: Sustainable lasting impact for social good (a.k.a. To do awesomeness)
Users: Everybody is equal, we all rock"

Theme: Scale
Case: London's portable "Parklet"

Sophia: "I think what would be interesting would be, measuring data, working together with people that do that, collect the data and what they do with it, I think that is an interesting part that you would have to work together but that would be… fun?"

Jeroen: "Yeah also with city planners to see how this can actually be moved around and impact people, definitely interesting to see how to work with behavioural people, so if it actually has an impact, personally I do have a problem with this project but that's maybe me, I would approach it differently if a question like this would arrive"

Sophia: "Yeah, I think, but in terms of partnerships like behavioural psychologists, what impact does it have and also when you seat in the green, does it really change something? Like, psychologically, is that really better?"

Jeroen: "The question of the project would be interesting for me, the solution they take, if we would create… do it like this, I would not find it interesting, but that is more about the solution so...that is not about the scale"

Sophia: "I think also with the city organisation but also with…"

Jeroen: "Events! City marketing, how can you create buzz around it and get people to come together here, that I would be interested in, so how can you, for example, if this would be placed in a poor neighbourhood, how can it become a place where people start having conversations together, that kind of partnerships…"

Sophia: "Also how it moves around, because now it seems like a portable thing so it's gonna be placed at different places and measure the air, that, planning that, with the air pollution people but also the city people who planned that and also especially thinking, 'and then what?' like, we measure it, there comes something out, and then we learn something from it. This feels like a starting project, where you wanna learn something, where you wanna have more, so yeah, it sounds like the bench is just the small scale thing and then you are gonna scale it up because that is the next step!"

Facilitator (student): "So, is it still too much on the exploration phase?"

Jeroen:"NO, I think is good that it is in the exploration phase, that is good, what I kind of have problems with, but I don't know the briefing that is behind it is, I think these things will almost never go beyond exploration phase, and in a way it is interesting to play around with this, but… well…"

Sophia: "Maybe let's do differently, I think the question it come here we just, you know, I think we just, the solution with the bench, and it's portable and the shape, maybe that is not just on a personal level reasoning, but the question is would we still be interested in doing something, but if you think how can you improve city pollution or how can you create green oasis in the city, that is a very interesting question of what this could be one test outcome but it would be definitely a little smaller that is there, and really as a test base as to see, 'would this work?', yes, can we create it as a portable item, that would be next."

Jeroen: "I think if the project end here, if this would be the question and this would be the end result, [Sophia: "then the scale is too small"], then I have two answers, one is 'I would still like to do it 'cause I think it is fun to play around with this', but I think, strategically, from Oak & Morrow's perspective we should say that it is too small, that it will not result in impact that… that should be a bigger picture."

Sophia: "Also because of the question now, it looks like, you know you got perhaps the pollution specialists from the city and then they design the great outdoor bench with lots of green on it, so the question feels now more like, 'can you design a bench with lots of green where we can place these sensors on?', and that is much more like a product design, furniture question in a way… well I think in that way it wouldn't be…"

Jeroen: "And that is the depth and breadth, I think one of the important things that we don't do well enough yet but we should do is, we are a strategic design studio so if they come to us we

will create real positive impact that its lasting, I think that is the depth and the breadth that we try to have…"

Sophia: "Just putting a bench that measures pollution does not cut it, in a way"

Jeroen: "No, and I think that ****(information about a company that approached the studio) these kind of projects get all the attention, and they get it because they are fun, but there is no bigger idea behind it to have a lasting impact"

Sophia: "I think also with the fun thing where you make it now so black and white, but it is not true 'cause the fun thing has a bigger scope if you go through with it, and I think that is the same with any object"

Jeroen: "Yes but that is the discussion 'cause they don't go through with it because for them that's it, and I think the danger that we have as a studio is that we also like this, because everybody likes creating these experiments, and they are fun, but if we really want to stand out as a design studio, strategic design studio, the depth and breadth should always be long lasting impact."

Notes on the poster of the case (post-its):
- Interesting: working with Behavioural theories and psychologists and working with Data.
- This things will never go beyond exploration stage
- Interesting: working with city planning
- Interesting: City marketing, how would you create buzz about it?
- Interesting question (city pollution), not the solution though.
- It's too small (negative aspect)
- Feels like a starting point.

Artefacts:

<u>Sophia</u>
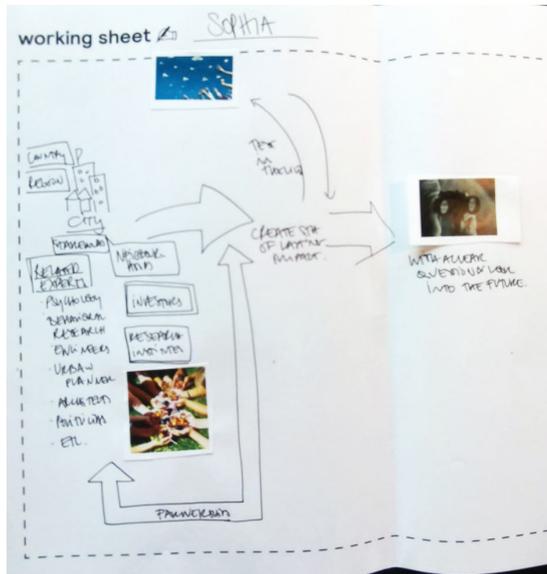
Jeroen
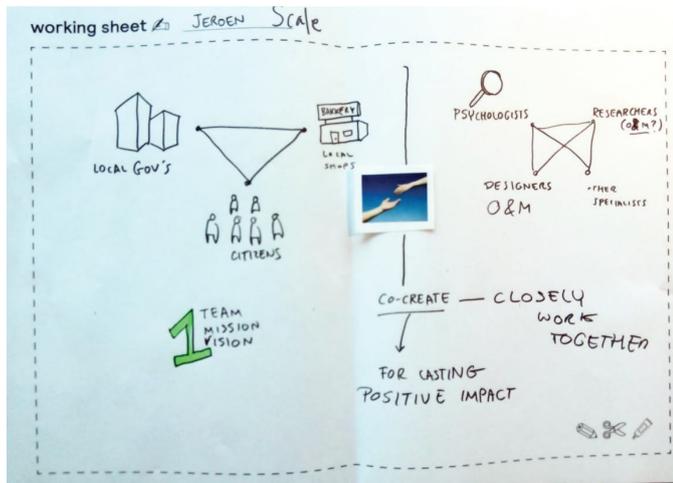
Theme: Topic
Case: Bus stop moves

Sophia: "Well, I think, topicwise is really hard to make a choice because there is nearly any topic where I would say categorically this is not a topic for Oak & Morrow, I can't think of any… oh maybe yes, handful things, 'Let's promote smoking in the city', 'We want more pollution, that would not be our thing. But anything that is in a way for positive impact or related I think in general it could be, I think the question is the matter…"

Jeroen: "There may be some areas, for example, would you do anything for religion?"
Sophia: "That's kind of the same as smoking" (laughter) "No, it's a no"
Jeroen: "Would you do something for a gay organisation"
Sophia: "Yes. I think for Oak & Morrow it would be not suitable to do something for a religious…"
Jeroen: "Would you do something for a political organisation?"
Sophia: "Not as Oak & Morrow, no"
Jeroen: "But we would do a gay organisation…"
Sophia: "Yeah"
Jeroen: "Interesting."

Facilitator (student): "We can link topics with values."

Sophia: "I think there are things with topics where we can restrict it, so, if I look at 'infrastructure', how can we make the trains better, more efficient or technical questions of how can we improve the system, that is not for us…"

Jeroen: "Eh, wait, one second, is not that easy, if you could the infrastructure of the way planning goes in day care for elderly…"

Sophia: "NO, wait, that is a different one, because what I meant here is, if the infrastructure question there is, 'how can we improve it so that the roads are less bumpy so that people can drive faster?' we are not the person to talk to. If the question is about 'how can we improve the people's life, who have to work within this infrastructure and they have these kind of obstacles given because the infrastructure, the planning, whatever it is, how can we improve their…?'"

Jeroen: "You should connect it on a different level to get a clearer answer, because, any topic will do for us as long as it is about positive impact for people. The other thing is, what is our role in this and what role will we take and what role will we not take, so that is a difficult thing for us, because would we do something where we would only be the designer? Or we would only be the strategist? So what's the… Because still there, with our new website, we split it up, and I first thought that Marten was of the focus that we should always create something, then he said no, it can also that we create the strategic and others start designing for it."

Sophia: "I think can stand alone, depending on what it is. (the strategy) It will never stand completely alone, because we can't cut it out, because we are all designers, it is not like you are gonna design something without any thought, or strategy behind it, but maybe you are not gonna do the bigger impact thing there"

Jeroen: "Like Zilver, they only do service design, so they only create blueprints, customer journeys and do sensitizing and that kind of things, so that could be work for us"

Sophia: "If the question is, (of course we want more) but if the question would be only this, we usually start there and we hope there would be more but there can be that is just stop there, and I think then, it depends again, if it is interesting enough for us that we say 'we already know they have a graphic design team that they always work together and they are gonna do everything

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and we cannot do that part but they asked as to do the strategy before', is it interesting enough? Then we will do it, if it's not interesting then we won't."

Jeroen: "We would do the service design, and let's say, another design agency would do all the design?"

Sophia: "I think that could be possible if it is a really interesting project, we would not do that for a small scale thing..."

Jeroen: "No, but the thing is the way we position ourselves in the market is completely different…"

Sophia: "Well, I think our intention is always to do both, but the same goes for designing, if the ****(transport company) says we need a design for the outside for our trains, but there is no strategy involved, there is not research, would we say no?"

Jeroen: "...it really depends on what type of people you hire, if we always hire designers who can also do the service design part, well, it will be very difficult in their character to move away from the solution, but ok."

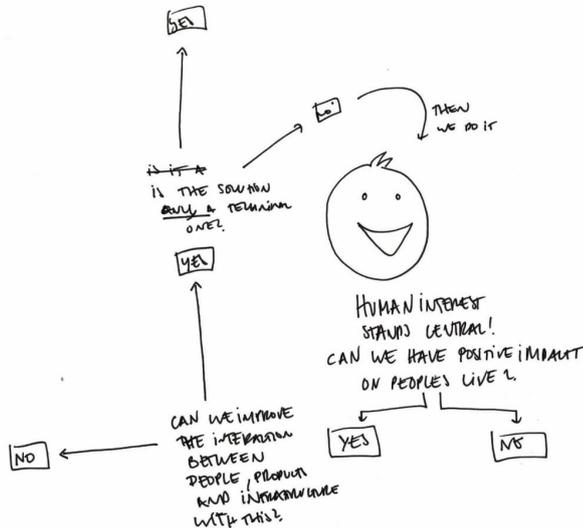*Notes on the poster of the case (post-its):*
- Any "Positive Impact" topic is interesting for us
- It can start with strategy and stop there, but ideally it continues to design
- Positive impact for people!
- No technical questions, but human-centered ones

Artefacts:

<u>Sophia</u>
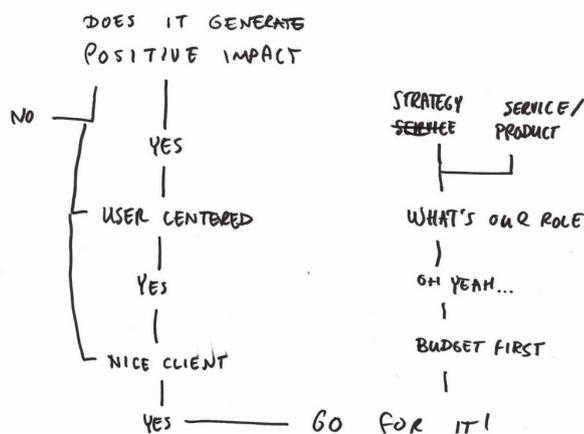
<u>Jeroen</u>

Theme: Values
Case: WalkNYC

Jeroen: "(WalkNYC) This is a system, of course, is like 9292. Everybody, whether you understand the language or not, whether you are color blind, you cannot even read, because probably they thought of that as well, they probably have a solution for blind people as well… so everybody is equal, everybody should be allowed to find their way, so yeah, this is for me 'very 9292' kind of values."

Facilitator (student): "But then, what would be interesting of a project like this, value wise, for Oak & Morrow?"

Jeroen: "Everybody is equal…"

Sophia: "...and the target group is huge, the target group is a complete city with all its different inhabitants. New York it is also, like, you have the whole world there, and you have not only the citizens as well, but also the visitors and even for citizens, if you end up in a part of New York where you have not been yet, you are as lost as anybody, so… that and it is also crowded. New York is not a big empty street. I think that is the challenge here, that is for the whole world so there is no real target group in that way…"

Jeroen: "Scalable! I actually think, personally, but this is my love as an interaction designer, is that I like this solutions the most because they should work for one person or for 50 million people, and they are the hardest nuts to crack because they need to be the simplest things ever and your ego as a designer and wanting to make stuff beautiful gets killed along the way because you just have to make it work, instead of picking that nice font because you just wanted

to use it. No, you have to make something beautiful and combine it with something that works. These are the real solutions."

Sophia: "...and also so many use cases, just like the pictures you see there, people on a bike, people on a wheelchair, different heights, different sizes, spaces and languages, from a far distance, up close, light, dark…"

Jeroen: "Also when it gets destroyed, when it -20ºC… all these constraints… this is the kind of work that I really love, more than the London parklet"

Sophia: "I think if you go to emotions to stakeholders…"

Jeroen: "RELIEVE"

Sophia: "...and in this case, emotions, very little! Kind of like, 'it was very easy to navigate New York, it was no problem at all', and then you are like 'but why?' 'I don't know! Oh yeah right there was this thing...' but you kind of don't notice it.

Jeroen: "My biggest frustration and my biggest pride was designing solutions for Schiphol and 9292, where I would always say 'If nobody talks about this and they just use it, then I have done the best thing. If they talk about it they'd probably complain, 'cause it should just work' and that it's really an important one."

Sophia: "Because you just want... is information design in a way, so you just need to know… is like Airport signage, the ones you remember is because you didn't know where to go and the ones you don't remember at all, they just worked."

Notes on the poster of the case (post-its):
-   If it elicits very little emotions is good!
-   So many use cases! So many constraints! We like that
-   I like this cause it should work for one or for fifty million people
-   Real solutions are the ones that work
-   Everybody is equal and have the same rights
-   Is interesting that it is in such a crowded place
-   Positive point: Scalable!

Artefacts:

Sophia
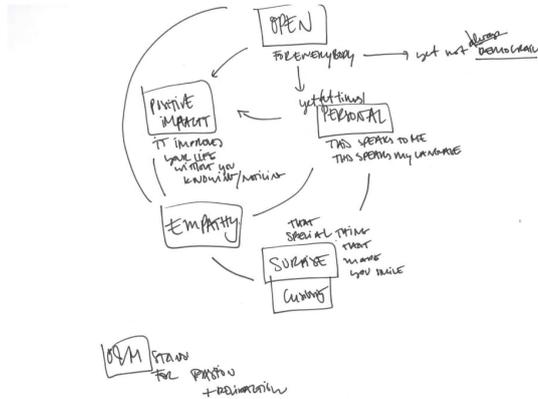
Jeroen

Requirements

Jeroen: "Ok, money!"

Requirement: Money

Sophia: "An aesthetic or strategic…"

Jeroen: "...not OR, strategic impact, that's what we say, we always want to have an impact"

Sophia: "Yeah, aesthetic combined with strategy but then pure strategy or service design level, that only strategy, that's a different…"

Jeroen: "I think if it's City Making…"

Sophia: "For example, make a beautiful bench, we need new benches, and then we would ask, 'but why? Do you want people to connect on these benches? What do you want to happen on these benches?' We alway will ask strategic questions… but the question would be 'can you create an aesthetically beautiful bench?"

Jeroen: "But then it's not a City Making assignment, I think there should always be Social Impact, because otherwise is not City Making, otherwise is just product design. Because City Making for me starts almost always on a service design level"

Sophia: "Ok, then we have that."

(about Oak & Morrow's definition on City Making related projects)
Jeroen: "You can design city lights, but you can design lights that if you pass by and you don't feel safe or comfortable you can actually make it more bright, that it's interesting! If it's just creating beautiful lights then it is not interesting. Again, if the thing is, 'we need to have in Bielefeld an environment where you feel safe' and we say 'you should create lights, we can create beautiful ones' within the total question, then is for me a City Making question."

Requirement: Social Impact

Jeroen: "Another requirement is sustainable! Not so much (in the sense of) lasting, but it means that they way you designed it, the thoughts…

Sophia: "OK, I can live with sustainable, lasting I wouldn't agree"

Requirement: Sustainable

Jeroen: "User-centered! Almost miss that one"

Requirement: User-centered

Jeroen: "...and requirement is a client that understands it, a dedicated client… Committed client!"

Requirement: Committed client

Jeroen: "The other one is more money" (laughter) "We always need more money, money plus!"

Sophia: "I think in general it has to be a challenge in a way for us, I think usually we are good at finding challenges in any project, but there has to be something which challenges us. So… if there is a question that we think 'this has been done before' and there is no excitement and we cannot turn the wheel around, we cannot have real impact… I mean it goes hand in hand with the real impact… no?"

Jeroen: "Yeah yeah yeah… I am thinking 'can we replace this with innovative?' but again I am like... aaaaah...it should not be innovative, challenging question is better than innovative, yeah, I agree.

Requirement: Challenging question

Ranking the requirements:

Sophia: "I think for me, in a way, the challenging question kind of comes first! If it's something where we don't feel this is something we wanna jump on, we don't do it!"

Jeroen: "So if we see that it has social impact, but we think is boring, then we don't do it"

Sophia: "If we don't get excited about it we don't do it. I think it is hard to believe, to imagine a case that has positive impact, the money, the social impact, is sustainable and we think 'I cannot find a challenge in there'. I can't imagine something, but if then this would be it."

Jeroen: "I think I agree at this point, but still we could make it a challenging question. We should be able to not always make something completely new, but also make it interesting to copy paste the basics…"

Sophia: "I also agree that we can make keep it challenging for ourselves, so I am not so worry with that we would kill any projects in there…"

1. Challenging question

Jeroen: "Next is yeah, for me positive or social impact should be the same, for me second is positive social impact."

2. Social Impact

(Jeroen and Sophia joke about how money should be second but in reality is not for them)

Facilitator (student): Third money?

Jeroen: "User-centered."

3. User-centered

Jeroen: "Dammit we are really bad commercial people. Yeah the fourth should be money otherwise I think we are a complete failure so let's make the four money… still I think is the committed client"

Sophia: "No I think is the committed client because if we have a committed client, we have the social positive impact, we have it user-centered…."

Jeroen: "We should have money somewhere!" (laughter)

Sophia: "We should but is not, look at what we do, we should but it's not, is about how we are now and in the near future. It will evolve but right now I don't think it is there."

4. Committed client

Appendix C. Discussion sessions with Oak & Morrow

This board visualised for the first session a document where Oak & Morrow had made attempt to map their design process with the different aspects they consider and questions they make in this process. Throughout the two sessions the board became a "brain-pool" for ideas or existing information on Oak & Morrow's process and toolkit

Set-up of the sessions

The sessions were conducted at Oak & Morrow with Jeroen van Geel and Sophia Altekamp as pasticipants. In the second session, Jelke Blankenstein joined for the discussion.

The plan for the first session was the following:
Total time: 90 min

1. Explain goal of sessions 1 and 2 (2 min)
2. Present Schedule for session 1 and 2 (3 min)
3. Talk to 'align expectations': What method are we mapping? The current one? The preferable/ expected one? Differences between the design process or method and the 'way of working' or working process (5 min)

4. Exercise for 'Aligning mindsets': create a mindmap of O&M's design process. Explaining the exercise, doing it and presenting it (30 min: 5 min explaining, 10 min doing, 15 min presenting and discussing results)
5. Map the method on the wall: revise the content generated in last session and choose for tools and real process. (45 min)
    a. Think about the whole picture. Is the process mapped now too detailed? Do we need all the information?
    b. Revise questions and answers
6. Concluding: summarise what we have achieved and where we leave it for the session of the following day (5 min).

The plan for the second session was the following:
Total time: 70 min

1. Brief catch up (5 min)
2. Map or sketch the followed design process per design expertise: corporate identity, smart products, websites, interactives, apps, etc. (20 min: 10 min to work separately, 10 min to present, 5 each)
3. Check the content of the questions in comparison to the BA model to see what information is missing from the model and adjust it. (could the missing content grow around it?) (40 minutes)
(in the session, we changed this to writing down the steps or working process that is used by the studio in different types of project and the tools used within their design process.)
4. Wrap up (5 min)

Material for the sessions

Session 1:
- *Post-its, tape, A4 and A3 paper, pens, etc.*
- *Printed schedule of the session*
- *Printed script of the session*
- *Case for the mind-mapping exercise*
- *A3s with different mind map templates*
- *Printed inspiration cards of typical design processes*
- *Printed Oak & Morrow's tools templates*
- *Printed design tools (other)*
- *Printed poster of Oak & Morrow's design process (state of the art)*
- *Printed titles, templates for pasting questions and tools, printed questions and tools, printed cards of possible activities such as design meetings, etc.*
- *List of explorative interview questions*

Session 2:
- *Post-its, tape, A4 and A3 paper, pens, etc.*
- *Printed schedule of the session*
- *Printed script of the session*
- *Printed posters with different design process shapes or ways of visualisation*
- *Prints of the BA model and poster with the design process questions*
- *Working sheets to map design process of different design expertise products*

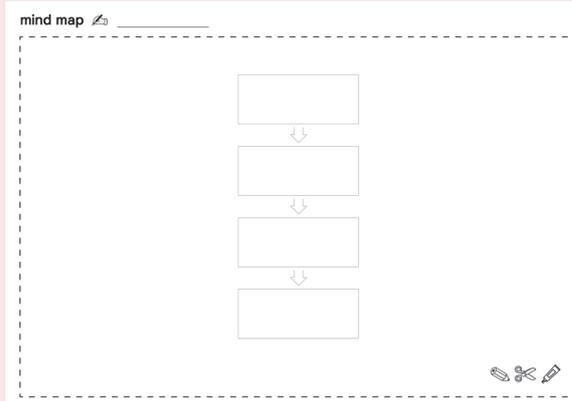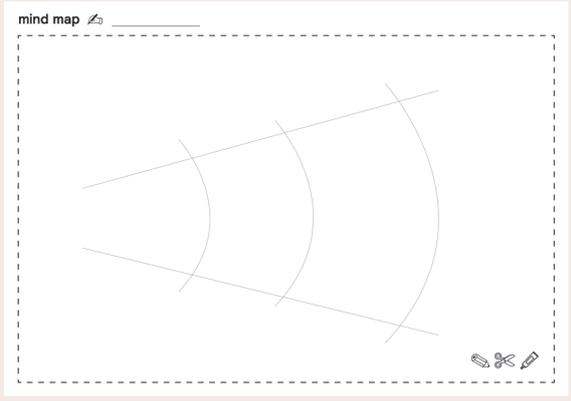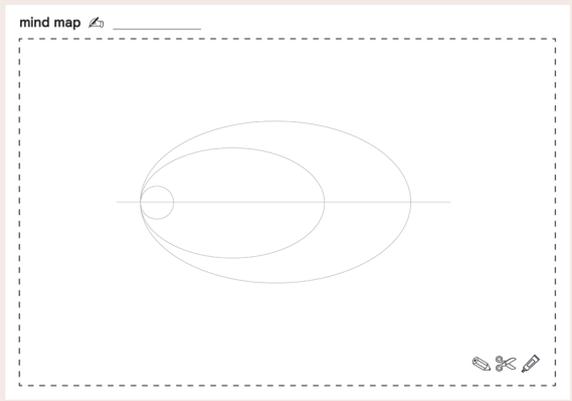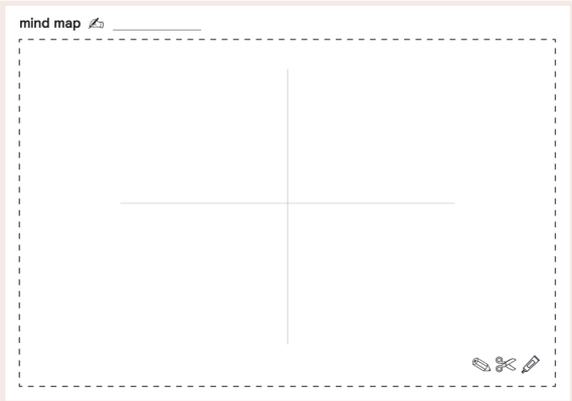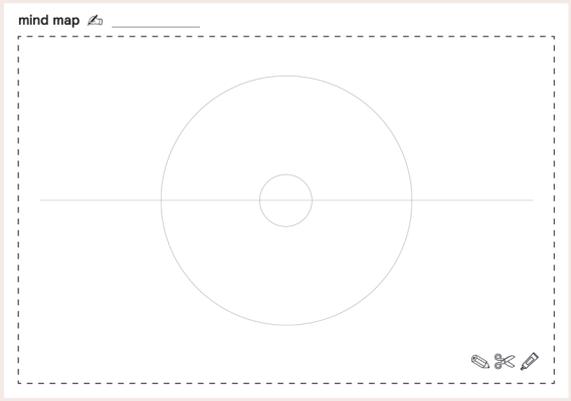## Results and material collected in the session:

First session:
In the first session, different sketches from the designers that aimed at mapping the design process of Oak & Morrow were collected. Ultimately, the design process was mapped and a visual process drawn by Sophia was agreed to be the most exact. Those can be seen in this appendix.
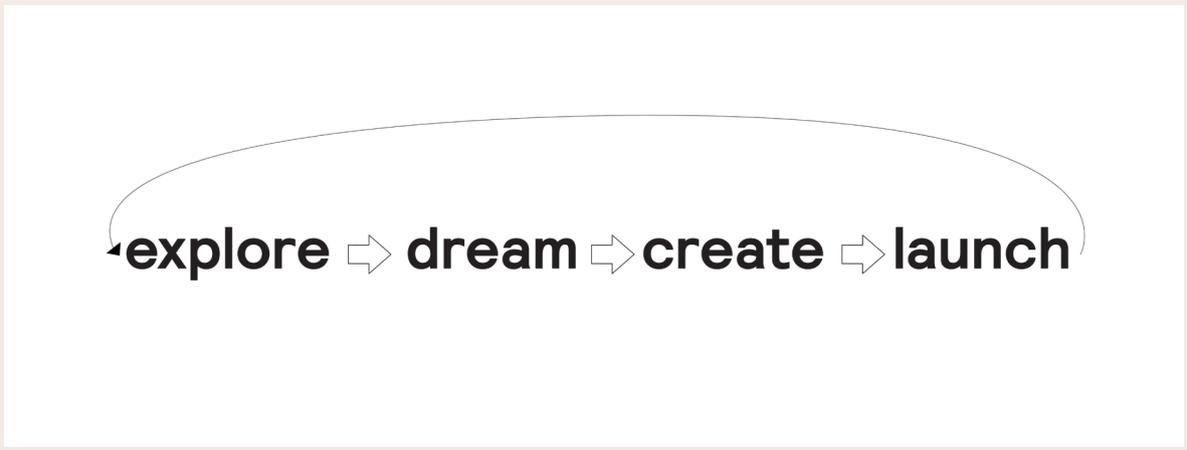
Second session:
The main visual results obtained in the second session were the three specific design processes per design service, mapped in agreement by Sophia and Jeroen. Those have been digitalised and are included in this appendix.

Moreover, the transcripts that helped collect the insights of the session can be seen at the end of this appendix.

Material for the sessions: mindmap templates (for inspiration)

mind map ✎ _____

mind map ✎ _____

mind map ✎ _____

mind map ✎ _____

mind map ✎ _____

mind map ✎ _____

Material for the sessions: working sheets to map the design process for each of Oak & Morrow's design services

corporate identity ✎	smart products ✎

print & packaging design ✎	routing & signage ✎

websites & online presence ✎	interactives ✎

interactive spaces ✎	apps ✎

business & product innovation ✎	brand strategy ✎

service design ✎	✎

Results: the design process of Oak & Morrow mapped

	why?		how?		what?
INPUT		RESEARCH **DISCOVER**		SYSTEM SERVICE PRODUCT CREATION **DISCOVER**	OUTPUT

- brand
- archetype
-
-

- customer journey
- service blueprint
-
-

- identity
- product
-

core	idea	design
EXPLORE	DREAM	CREATE

explore ⇨ dream ⇨ create ⇨ launch

Business & Product Innovation

input	output
Briefing KPI's + Goals Deadline Budget Stakeholders	PROPOSAL

explore

BA model

(info collected from) → - Session: what? why? who?

Customer/ Target group needs → Personas/ Customer grid

(info collected from) → - Market and User research

Core Idea Sheet → Ideas

Business Model Canvas → Business product/ Initial concept

(info collected from) → - Session with the client

(iteration)

Design Sprint/ Fast prototyping → Products in prototypes

User testing → Insights (product specific)

Produt testing?
Expert review?

Brand Strategy

	input	output
	Briefing KPI's + Goals Deadline Budget Stakeholders	PROPOSAL

explore

Brand Heritage
Organigram
Market analysis

- -

BA model

current situation

(info collected from) └───▶ -Documents
-Input from cliet
on steps 1 to 4 of
current situation

Current situation
of the
company/ client

BA model

future situation

(info collected from) └───▶ - Session with
client on all steps
of future,
aspirational
situation

Brand Story
Vision
Mission
Essence
Archetype

╋ Customer/
Target group:
Personas?
Customer grid

╋ Examples of
products and
services

Service design

	input	output
	Briefing KPI's + Goals Deadline Budget Stakeholders	PROPOSAL

explore

Market/ product
research
Process research
Grip on context
Organigram
Company strucutre
Internal processes

(info
collected
from)
→ - Interviews
- Sensitizing
tools: Diaries,
cards, workbooks,
etc.
- Analytics

Audience definition

define

Service blueprint
Customer journey
(current situation)
Customer journey
(future situation)

Roadmap
Requirements
Project description

+ Examples what/how
the solution
could be

Transcripts of the sesions:

Transcripts of the most important conversations of the Session 1

First exercise, doing a mindmap of Oak & Morrow's process to align mindsets

Sophia presents her mindmap of the design process
(picture of the design process)
"...you have the input which is more the initial questions, we have an idea or a client comes to us with some questions, that is more the input and at the end there is something, like a product service, whatever we make.. (talking about a title named output). But in the beginning ==even when we get a question like, 'we wanna do an app', we always take it really fast to zoom in on the 'why?'==, so this 'why', 'how', 'what'. We always really wanna know ok, why do you need an app, and why is this, and ==we always say, we cannot do anything if we cannot zoom in in this kind of 'why-core-thing'==, and that is really the center I think of us and we always take it to the front and from there we go further like in exploration, we develop ideas, we dream, there comes all the 'how do we do it', the research part, the customer journey, all these things, these are the parts that happen there and then comes the creation part where there is actually design, where we actually make something, whatever that is, a system-service or a product. For me all the tools, brand key, customer journey, whatever, all falls into this process, so they all have their play within these circles… *(inaudible part)*. The 'why' (circle) is really small because we are also not gonna have ten versions we do this, there is gonna be one process, maybe two, but maybe them from here depending if it is a service or a product you take like a different route through this to get out."

Summary

We always jump fast into the 'Why?', even when the client often comes to us wanting a product, such as an app. Although we start from the product, we always jump into asking 'but why do you want this?'. That is the part of the brand and the archetypes, that is our core and we alw ...from there we jump into the exploration, we develop ideas and we dream.. 'How do we do this?', customer journeys and all that kind of tools come in there and then we go into the creation

Jeroen presents her mindmap of the design process
"...I think it is an umbrella, because, somewhere in the umbrella we always get a question. So the question always comes from the 'what', almost all the questions we get come from the 'what'. ==Almost all the questions we get from a client for a first contact come from the 'what' level; 'we need a website', 'can you help us with the logo', 'can you help us with the brochure'==…"

(Sophia intervenes)

Sophia: "Well but they are changing, we get more from the 'how'"

(They both slightly agree that it is changing)

1

Sophia: "...I think we want more people that come with the question 'we think we are ready for the next step as a company, how should we do this?', or they already know 'we need innovation or something, how do we do this?'. We want more people to say 'we need a new strategy, how?, 'we think we need an app', we say, 'well you maybe don't need an app, maybe you first need a vision and the product that will come out is not necessarily an app'. But I think it can still be both because there are other types of projects, depending on the scale of the project, where 'what' it is still a relevant and important question…"

Jeroen: "yeah but I think that a lot of the questions (we do) on this ('what') level are because we are individuals and we like to do it, but I think in the studio level this ('why') are the type of questions we should do if we want to have an unique position. Because I think if we think about the growth of the studio and the reputation of the studio we should actually make other choices in projects, up to a certain level. This (projects that start with a 'what' type of question) is mainly because we are all really enthusiastic and we want to do cool stuff, and I think if we stick to this level ('why' level) we can still do the cool stuff but we actually become more of the desired brand instead of the 'slutty brand' (laughter), you know what I mean…"

Facilitator: "Then let's say that today we are gonna map the aspirational process, with a mix of the current one"
Jeroen: "...I want to stay away from being just hands, just being really smart hands.." (talking about his preference to doing more projects with an strategic take)

Sophia: "...we always say, no matter if you come with a 'how' or a 'what' questions we always ask the 'why', no matter what."

(Facilitator asks to Jeroen if we wants to go back to explain his mindmap)

Jeroen: "...there are some things that are in my mind always but as soon as I write them down I realise they are not part of the studio, so that is interesting…am… so 'explore', 'dream', 'create' was one of our first processes that we described, I still like it, cause it has the right connotation in it. Some other things are… 'what is the goal', so that is 'why?', 'why do you want to do this?'…

...I presented at Sofia and at a lot of conferences, 'what is the problem it solves?' and 'what if the opportunity that it creates?', if it doesn't answer one of these questions… they are in our mind (referring to the designers from the studio), they are in the studio DNA. But still the 'core idea sheet' for example, I teach around the globe to people how to do this (referring to his work as a speaker), and in the studio we don't use this, we don't necessarily have to use one on one, but still… we should make it, we should keep it more explicit, because for us it becomes such a natural thing to go to this…"

Sophia: "...I don't completely agree, I think we have a lot of times that we have discussion within the studio about 'why?', 'does it makes sense?' and 'which problem do you solve with this?', we often have this discussion…"

Jeroen: "...that is also what I say, I say is in the studio, is in our DNA, but it's not explicit!"

Sophia: "in the process?"

Jeroen: "Yes, yes so for clients, the process of doing a kick off workshop where we try to answer one of these questions, filling a 'core idea sheet' with them, those kinds of things, become such a natural thing for us that we… oh, how do you call this.. Is the course of knowledge! If you became very experience about what you do, you don't think about explaining it anymore to people… that's our biggest problem"

Sophia: "Oftentimes we say, we start with a 'Brand Key', that's the process we do and clients are like, 'ok…', but we don't tell them, 'well, we actually do this because we really need to get this very clear'... so… tell it more! Right?"

Second exercise, once mindsets about the design process are aligned, we moved on to work on the previously mapped process on the wall.

Introduction of the BA model
Jeroen decides to present a model he has created lately on his own. (BA model)
To introduce the model, Jeroen explains that, although they currently use the 'Brand Key' tool as one of the main ones, he has crossed feelings about its usage and thinks the studio can improve the process of generating that kind of information with a different kind of tool or model.

- *The model is focused on the future, 'where do you want to go', not in mapping the current situation.*
- *Sophia thinks the model is a "really good setup", but that it has to be tested with projects to see if the information generated is truly the valuable one for the process.*

(The exact explanation of the way of using the model is not relevant for the analysis. The interesting information generated on the discussion about it is transcribed in the following paragraph)

Sophia: (about the BA model) "... the only thing, but that is why we need to test it, if it really automatically helps you to kind of use that input for the top, and makes it easy and clear to change it, because specially making this really obvious so that the clients see it themselves… because that is also with this (tools) when you go through it (the different steps) and there is like a hick up, and then they like don't see it for themselves, I mean, they can fill it in if we tell them exactly what we need from them but then the kind of solving part is not with them and then it is harder to follow, and then it is also less their own. The best situations with the 'Brand Key' and the 'Archetypes' was when they have this click moment and they really see it themselves, and they understand how we got there, if we miss that then it is always problematic"

(Sophia about the model)
"I think the structure (of the model) really helps because you could build on it"

"... I still have struggles with the flow, I really need to fill it in once…"
"... this would be a session (with the client)…"

(The facilitator of the session redirects the discussion towards Oak & Morrow's designer process, is there a need to map it? Or is it better to just talk about an Oak & Morrow's toolkit? Jeroen and Sophia react to that)

Jeroen: <mark>"...the design process is really standard, except for our words… the tools create the flow within the steps or over the steps, so for me the toolkit is actually a visualisation of our design process, in the details"</mark>

Sophia: "and in a way that it is also what we drew, we both drew the 'explore', 'dream', 'create', the 'why', the 'how', whatever, and then we both see at different points you have different kind of tools in there, different questions you need to answer"
….

(Sophia explains)

Sophia: "...there is also where last time we started, the explore, dream, create phases, you can also call it the why, how, what (later on they will discuss both groups of concepts cannot be compared, they don't mean the same), those are the three, these are the questions you wanna answer and these are the tools for each phase."

Jeroen: "look, the discussion for me here (points at the end of the 'create' phase of their design process mapped as 'explore', 'dream', 'create') becomes fuzzy...<mark>we are not a full service studio,</mark> so what this means and this means in collaboration with others, and the fact that <mark>the creation is not the end wall, it doesn't end there, that is important.</mark> The fact is that <mark>we have projects, and they are within a bigger context that is within a bigger context, and this should be of our design process as well...all the stuff that we do is part of a bigger whole.</mark> That's maybe the main thing in which we should have a(nother) process (referring to mapping something more that the explore, dream, create phases), but if you look at a project level this is the process: <mark>so a book is explore, dream, create, finished, a website is explore, dream, create, improve, improve, improve, improve, or go back to explore. So you have small iterations and a bigger one.</mark> (...) Brand design is different than physical product design is different than digital design, but they all have an overall, for all of them this is true (referring to the three phases of explore, dream, create)."

"You should keep it simple, I think in a simple way, you have stuff that ends and stuff that iterates, that's it, that is the simplest"

(we move on from talking about the overall design process to talking about the studio's toolkit)

Sophia: "Intuitively we all do these questions, but we don't always ask these questions very clearly to our clients and make it really clear for them, and I think, also over the years you know, <mark>when we started saying 'our process is with the 'Brand key' and the 'Archetypes' and</mark>

then a 'Customer journey'', those things really help; and we have an attached price tag to it and an attached hours and hourly rate, we know we can do this on that. That makes it as kind of like building blocks and it makes it much easier to sell, and much easier to get a grip on from the client part. This (the tools to answer the questions of the design process), I think if we package it good, like for ourselves, if we structure it better then is also another block we can also sell easier and it makes it easier for everybody in the team to say ok, these are the blocks and that is what we work with, and we chose this package now and there is a clear argument behind each one on why would we do this."

(....)

Jeroen: "some things like market context we don't dive in really deep"

Sophia: "...we had a few times this moment when we say, damn, we can do that, we could do this too (regarding a step or exercise of the design process, e.g. use testing), we already do these things why don't we sell them, and that is also because you forget"

"... what I think the aim here is more that we have a toolset of all the tools we use where we say this is our set which we do you. The core idea sheet was one, the brand key we always knew we had to do something about it, so the new model (BA) would be it…"

Jeroen: "I like these questions (referring to the ones written previously on the studio's design process first meeting) and I think we could add them to our model (BA)..."

Sophia: "we could also ask ourselves… because, for example with the Customer journey we always do a current customer journey, like tell me how it is now, and tell me the dream scenarios, where you wanna go, what is the vision. Then we always kind of see that is the overlap and this is the points we really need to pick up now and this is in what we have to work on. With the BA model, I can imagine that you also wanna fill that in for the current situation… it could help to think where are we now, what are the values, etc."

Sophia: "there all these kind of customer research, things on the iteration phase as well like expert reviews… all this bunch of stuff that we can do and I think we could position us better and offer this and even if we don't execute it always ourselves and we ask somebody else to do it, but I think this research part we really need to claim it a bit more for ourselves and sell it a bit more"

(...)

Sophia: "If I look at the customer grid, the brand story part and also the customer journey and the core idea sheet, those are really Oak & Morrow, they are a 100% the way we do that and they fit. If I look at these toolkits, like the service blueprint, I think...oh I have never seen it… this is of course an example sheet, but also if I think on the Business Model Canvas… no, we don't need to redesign that in that way but then also I think our expertise and the questions we can answer here, they are different than if you would ask a Business Developer."

Jeroen:...yeah, but… the thing is, we know how to do this, (referring to the BMC) the only thing is that we did it by gut feeling, and because of the gut feeling we forget about questions, because we do it our own way, and I think the business model canvas is not that difficult, except that at times you have to do research.. (...) so I think it should be part of our language, our new language"

Sophia: "I think we should take a second look at it, specially because we don't use it so often we should look if this is the way we fill it in" "Do we wanna use this and in which cases do we wanna use this?"

(Jeroen goes to the list of products or design services offered by the studio and points at 'Business and product innovation')

Sophia: "The thing I mean, is that I have the feeling too many times we think 'hey! We could have done this! Why didn't we?' or that we come up with it in the process but then it wasn't on the forefront, and that's when I think this should help, that is more for us also"

Jeroen: "Yeah, exactly, so I want to turn it around. For me 'Business and product innovation', that is what I told Jelke as well, we need to sell products, so this needs to sell us a product: a one-week business innovation week, and in that week we are gonna start with understanding what your organisation is, what you want to achieve, what your culture is, day two, we come up with a lot of 'core idea sheets', twenty of them, we pick two and with this we are going to the BMC"

Sophia: "That's what I mean, then it is very clear and it is also on your forefront, because now we intuitively do it all but we forget to give it a name, a call it clear.."

(Jeroen pointing at the different strategic design services O&M offers in their website [right part])

Jeroen: "'Brand strategy' is the 'Brand Key', 'Service design' first you got the 'Brand strategy' then you go to the 'customer journey' and blueprints, 'Customer insights' is research so sensitizing and interviews, and 'User testing', so in all this products we know the process and 'Business and product innovation' is the newest one for us, and this ('Product innovation') is actually where we are strong, 'Business innovation' is scarier for us, that is the part where we agree, where we are moving to an area where I think we are creative enough but where we also need to know the 'cost structure', 'revenue streams' and all that stuff…there we are an amateur level, there we need to connect people to us or grow, but at least we know where to grow"

(...)

Jeroen: "…you know what we miss? One of the comments we get is that people think that the brand key is an end result, because of that we also created the brand story document but actually that also doesn't really communicate… We don't celebrate the results, so summarising things in posters, in beautiful… the customer journey of Hubo is really ugly… It

has the deepest content but it doesn't communicate. Making end products out of the… <mark>The tools are tools and they need to get an end result, what you are going to deliver. We need to think about presentation"</mark>

(Jeroen and Sophia end the session discussing how the tools should be 'big container words' that you can also manipulate in its use depending on the project)
Jeroen: "...how bad we are at documenting it, I still think we are really good at going through the steps, most of the times, we really have a process"

Sophia: "I think that too, but I really think we could communicate it better to the clients, many times they are lost, and because you or me we actively tell them, and that is ok but that is why you have to be there all the time, and <mark>the nice thing is if you have a process a bit more clear you can actually give it out of hand, you don't need Jeroen van Geel calling the client and explaining it necessarily all the time… right? That is the goal!"</mark>

Transcripts of the most important conversations of the Session 2

First exercise, they fill in the process of each design service offered in their website

Sophia: "...you took all the topics of the website, and I have the feeling that in the left side, the strategy part is where we can more fill in this, but in the right side, the creation part, there I have the feeling that there is much more repetition in the process. Of course in like how you do it there is a difference between if I am designing an app or a website, but actually not, like if you wanna do it in big strokes, it is all the creation phase in itself, there is a little exploration phase… then something else…"

(...)

Jeroen: "...I had Service Design, and there the interesting thing is that you don't have an explore, dream, create, cause the process is completely different, cause you don't make a concept of a service blueprint, you just create a service blueprint. So there I had explore, define and not explore, dream, create. What I found with Brand Strategy is that explore dream are really close together in the deliverables, so we might need to push them apart, cause I was defining those deliverables, BA step 1 and BA step 2, so I think they should be more torn apart to really create an exploration phase and a dream phase"

Sophia: "Yeah like in Service Design is much more like a… I saw you have like similar points where the kind of tools that we gather with…, so the interviews, the diaries, the cards, whatever sessions we do, there is kind of like the product that comes out of it, you know the customer journey is a product in itself and then the service blueprint is a product… Whereas in the Brand Strategy, it's all together, we have this session and then it comes out this thing… although what comes out of it is clear: vision, mission and the brand story, but it is not so clearly divided as this is where we gathered the input and this is what you get out of it"

Second exercise, talk about the studio's toolkit usage and how it builds around the newly created BA model

Jeroen: "...so one of the interesting things is that more and more we have found out that we are change managers, that we are actually not just coming up with cool things… so that is one of the challenges.

(Replying to the question of the facilitator if the tools they use map the current and future state or only one of these)
"We also create customer journeys of the current situation and then the wishes for the next… I think with the Service Blueprint is the same, you need to have current and future, so yeah in Service Design we do this (referring to mapping current and aspirational state). This model, Brand Key, has always been an aspirational one, but I do think you need to know again where the organisation comes from… (talking about the problems of communication with the client that the tool Brand Key can create) the problem, that I discovered is also a bit

in the new model (BA model), is that it actually has two phases combined in one model, which is the explore phase, the current situation and the dream phase is all going in one model...and that one (referring to the Brand Key) can still be used in both situations...so you can do one half 'where are we now?', but immediately you find out that you get stuck, so you would say 'what is your current audience?', 'what would your new audience be?', but then you need another model, so this is mainly for companies who want to create new product services, new brands, really find who they are and what is the direction we are taking… But yeah that is the main thing we keep struggling with, definitely, how to discover what is the current culture, what the current gaps on the service are, that is service design again, but this is on a brand level."

(Building on Jeroen's comment and starts referring to the Service Blueprint)
Sophia: "...and you can also (with the Service Blueprint) see more clearly 'we are here now and we can go there', and I think what it is often with the brand...what is also….we already had issues with that more than ==on the service and product level, because there we see more clearly where they are now and what are the challenges in changing the structure to actually get there, that is very clear, if it is a service based structure or a product innovation, and you really know: 'well, you have to change all these gears and then you can do this',== but then I think we often, well ==we say 'you didn't have one, (referring to a corporate identity) so we give you this! And it is awesome and this is what it should be', and we through all this really cool things their way, which is the brand identity and stuff, but then often there begins a little struggle…== I think there is actually the gap we fall in more often that we want to, because we think 'wait, we created this beautiful identity, all loved it, so what is the problem now?' and then there is this little piece of knowledge…of like 'ok, but they are here now and this is where we said they should go to, and this are all the things that need to change in there, not just from a visual identity but other internal parts have to go into that mindset'. ==I think there we do lose a bit because we don't map clearly where they are now, even if this current situation is messy and there is not really a brand… maybe for some people it feels like there is a current brand, and they really feel they do it in a certain way… yeah, and we just assumed we presented the golden way== and they should all… yeah, I really think that is a problem situation for us.

Jeroen: "With Boom for example the interesting thing is that we came up with a really cool new identity and they are going to implement it, but…"

Sophia: "...but still there, if you take the titles and the whole discussion we had about the titles, was clearly, there was a point where their faces dropped like 'but this is 150 years old!'. We knew it was old but I don't think any of us were really that clear that this was going to be such a touchy point, like we knew this could be a point but still…"

Jeroen: "still we managed"

Sophia: "yeah but I think that is something we turn a blind eye to in some way"

Jeroen: "no… yeah, ok. I think the interesting thing is that in the end our internal organisation we forget to… because for me it was very clear (referring to the titles of Boom)... for me the

gap in the process is, our biggest weakness in our process is our internal process, and not our process toward the client, cause I think we are really good at strategically helping them further… (...) but the moment we do it internally, it's ==oh, the designers only have three nights to finish it, so move forward, no time to look where it comes from, no time to stand still and reflect, just (Jeroen makes sound of speed)', and then we have the luck that we have good designers so we kick ass, but that is where a lot of the value is lost in building it up, to be honest.==

(Sophia and Jeroen discuss briefly around the topic if they are strong or not on branding regarding mapping the current situation and history of the company)

Sophia: "...I think there sometimes, with the Brand Key, is not like we, at least I, go into the organisation to really hear 'what is your take on the current brand story'. I think we do get the information to create a new one and to really capture what they are, but not to understand where everybody is standing right now… but it is maybe the translation that is lost then… because I think I personally have a good grip on it but I don't think it always works smoothly in the process, that is what a mean…"

Jeroen: "in the internal process? Or the client process?"

Sophia: "yeah, maybe is the internal process but in the end also with the client"

Jelke Blankenstein intervenes (Business Developer at Oak & Morrow)

Jelke: "I just thought it was the same thing, you said, you actually map the way they currently are, and I thought it was the same thing, the way it really is, is that what we are talking about? Does that mean that you cannot really map it properly?"

Sophia: "...is tricky because we don't do it in a way like we do it with the Customer Journey where we really map 'oh, this is the current situation, we really worked it out, this is how it is'. It is also not necessary to really map out 'oh, this is the current mess you have of a brand, this is why you called us', we don't need to map it out, but I was thinking out loud, maybe we are missing something here, because we do always present something they really like, and they say 'yeah, that is exactly where we have to go to'..."

Jeroen: "the thing is it gets lost somewhere… (...) what it always gets lost is that there is so much subtlety in the company culture, where it comes from, what they like, who they are, not, we don't capture this, that is what you see in a lot of the discussion we have here… (...)"

(They agree that part of that problem is a communication problem and probably caused because of the visual designers of the studio not participating in the strategic sessions.)

(Sophia thinks that gap of knowledge is not only it, that there is a gap as well only within the strategic steps of their process.)

Exercise three, they map the process the studio follows to tackle different kind of projects, or the different design services that they undertake in a same project.

(They start with the design service of 'Brand Strategy')

Sophia: "well, in a way we replace the Brand Key with the BA model, so that would be both, is an Input and an Output, because in the end if it's completely filled in, I mean is a session, is a tool but in the end is also a blueprint you have"

Jeroen: "I think first step before we do that is to get a briefing, what are the goals they want to reach, what is the impact they want to have. KPI's, when is it a success, what is the deadline, budget, that kind of stuff… stakeholders, we need to know who they are, brand heritage, the model… if I google it (laughter).

… all that is the 'Proposal', it should be something that hangs on the wall. 'Brand Heritage', ok, (referring to Sophia writing those words) and then we go to BA Step 1… so, is there nothing in between? So, we know what they want, we know when they are happy, we know how much budget have, the stakeholders, and we know they want to have a new Brand Strategy"

(…)

Jeroen: "…that is actually BA Step 1, because then it says 'in what field do you operate' and 'who is your competition'."

(The facilitator asks if in this step they would first use the BA model to map the current state)

Jeroen: "Yes because here I would say 'so, we know where you come from, in what field do you operate?', 'We operate on the field of care, automated homecare, smart living…' and then you look at your competition, and then you say 'who is your audience then'. The interesting thing here could be that 'who is your current audience and who is your new audience'.

Facilitator: "but then do you do a double thing, as 'this is your current state, ok now we understand properly the company and you understand yourself too a bit better', then do you do this whole thing again thinking about the aspirational one?"

Jeroen: "Normally we only do the aspirational one"

Facilitator: "That I think is part of all that communication that gets lost…"

Jeroen: "Yeah exactly, that is why we added Brand Heritage"

(Sophia suggest that certain marked parts of the BA Model would cover the current next to the aspirational state)

(...)

Sophia: "...what I wrote down under BA Step 1 is that it doesn't have to be in a session, it can also be the questions we ask them before and the input we gather to fill in this (refering to the initial parts of the BA Model) of the current situation. So that could also be, that before we start a session we already drew this out, 'this is your current situation, this is what you told us', and now in the session with the client we do all steps of the future."

(Jeroen clarifies for Jelke that BA Step 1 is the whole actual BA model, and BA Step 2 is the outcome of the session with the model, that is a document with the Brand Story the brand essence, the mission, the vision… the summary of what comes out of the BA model. Jeroen: "The Step 1 in an internal document that ends up in the hard drive and Step 2 is the result that they can really use". Jelke: "So this (BA Step 2) becomes a product, and this (BA Step 1) is just a tool".)

Sophia: "While we fill this in we always have this side step with the customers, nearly on every Brand Key session we already do a side step in what we map their audience better, so this could become a more solid connected part of this.."

Jeroen: (speaking in dutch) "But do you know if you need this always?"

Sophia: "But this could be here, you know, sometimes we do work this out and then is eh..."

(They continue with 'Service Design')

Sophia: "We need it everywhere the proposal part"

Jeroen: "So then we do explore phase, interviews, sensitizing, analytics… (...) So it is like doing user research, but also analytics, some market research, it really depends… to look at the systems, it depends on the project, we look at how the process work, etc. (...) Ehm, so look at the world, look around things, look at the competition, look at how other solve it… yeah, market research, process research, internal processes"

Jeroen: "Service blueprint in the outcome there (pointing at a part of the sketch in the paper)"

Facilitator: "What kind of system…?"

Jeroen: "It depends, organigram!, it's departments, is people, products, services, whatever is needed to get the job done. If people have a van to drive to the client then the van is part of what we research, whatever is relevant. (...) So let's go to define I think, because from explore…(...) Customer journey, Service blueprint, Roadmap, Requirements document, and then Project descriptions"

Sophia: "I think this two… the Customer Journey and the Service blueprint are kind of products in themselves, so you could stop here and already have something you could use

in your organisation, while the Roadmap and the Requirements and the Project descriptions is really looking forward for what is the next step and implementing this also."

Jeroen: "So you would sell a Customer Journey without a Roadmap? Cause I think I would not do that anymore, to be honest, because I think otherwise it doesn't come actionable."

Sophia: "No, I wouldn't sell it without, but I think for the client is really important, I could say, 'we do this', ehm… but then when he is like 'well, I don't have the money to do the next step now, so even though we look at the requirement and the project is… I cannot do this now, so let's plan it when the time is right', then I can tell you, 'well, you already have something', it doesn't feel like a complete definition phase but you can think 'no, but I actually can work with the customer journey, we can already start moving in the organisation, we already know where we wanna go to, but I am not gonna do the next project' you know, that i what I mean"

(They jump to mapping the process of 'Business and Product innovation')

Sophia: "Ok, let's take the start up that comes and tell us 'we need to get this off the ground, help us' they come with an idea, not really a business, not really a product but an idea"

Jeroen: "I would say that this would be a damn good way to start (pointing at the BA model)"

(…)

Jeroen: "So then we find out, 'at what field are you operating?'. Again, we have the goal already, what they want to achieve, the money, here we already see all the wholes that are in the story… 'so who are you focusing on?' '(client would reply) everybody! I also want it for companies!'... we focus, focus, focus, 'what are the needs', we need to do research here (all that pointing at the BA model), 'what do you want to deliver'... so here we get a brainstorm, actually here is almost Business Model… we solve two or three concepts that we explore, so actually we wouldn't get the answers here, already, because here we basically solved… 'let us create two, three concepts which are basic idea…'. Core Idea Sheet, we haven't put it anywhere yet!"

Sophia: "This would be here"

Facilitator: "Would you use it in other type of projects?"

Sophia: "No, I don't think is necessary in others"

Jeroen: "No."

Jeroen: "The thing is that I would already rape the models here, and completely turn things around, because the one of the ways we use this is really to challenge, step 1 is already in 'what field do you operate', so already there you open it up (meaning you question the answers of the client), so this is the same 'who is your audience', this is the perfect one to get to the goal… And then the Core Idea Sheet could be pulled in like 'ok, write one for this

audience, write one for this audience, write one for this audience, are they the same? No they became different, for one maybe is a problem and for other an opportunity', and then we pick one. Here, 'what are their needs?', let's interview them, let's do user research, so here we would do user research."

(...)

Sophia: "So we start with this (pointing the written text 'BA Step 1'), from there we actually do pretty fast like a side step to the target group, we workout personas or this morphological chart or like some kind of mapping the user, but also here, once you have a little bit formulated what is the basic idea, we would ask is this idea at all something that people want, is this anywhere a direction that is anyway valuable to think further, so is more the general need, and from there you have the Core Idea Sheet, it goes into the Design Sprint and Prototyping, like making really fast something, which is a product in a prototype version, and then doing "user testing" again to check on a more product specific way, is this kind of direction something you would wanna use it."

Jeroen: "Yeah but that is not here, you really jump pretty fast here. I would first then go for the Business Model Canvas and see if something is interesting."

Sophia: "But that is here, the general need"

Facilitator: "The general need is like a market research, 'let's see if there is a market need there', but that is not the BMC"

Sophia and Jeroen: "No"

Sophia: "For me the BMC is more…. This is kind of for me like, 'I have an idea, I am not really sure if this is something that I can make money with, how do I test this and how would this essentially work', so what we do here is a first step where we are gonna look at A. are people generally interested, B. if we executed in this kind of way, is this a good direction, but for me the BMC comes after that because you need some basic knowledge of 'what are we actually doing'…"

Jeroen: "No, but the BMC also helps you in discovering"

Facilitator: "It can be an ideation tool, also, it can be in the last stages to map it really precise or to do ideation, depends on how you take it"

Sophia: "Yes, but I would be afraid if you use it too early that you are going to actually create something based on the resources that you have, you are gonna be like 'uh! These are the key activities, here I have good contacts, or this I can fix' so you can work out this (the BMC) in a nice flow, then you are going to downgrade your initial idea because that one you can solve, and your idea was with too many holes…"

Jeroen: "No, I don't agree… (...) I wrote down BMC, fast iteration prototyping, design sprints, whatever, and you decide depending on the product what feels right"

Sophia: "Would you do, like this here? (pointing at the sketch of the process in the paper)"

(Jeroen draws a cross on two steps that Sophia had written in the sketch of the process)
Jeroen: "I would kill this, kill this, sorry, and then go in… so you create a Core Idea Sheet. So depending on what we come up with here we can say 'let's go through the BMC and discover if there is anything in there', or you say, 'hey, this really feels good, let's build a prototype', but personally I would really like to go through the BMC first, because I think it really helps in talking it through. The thing is that you can create a prototype of something, but it already helps in finding out if we can create a prototype everybody loves, but if we find out that it costs XXX thousand euros per user to make it happen then people can be happy but we don't have a business case."

Facilitator: "I think you are discussing both in the end the same, I think what we have here is a constant iteration of 'let's come up with prototypes, let's go out, try to test it', at the same time we are talking about is it possible from a business perspective and constant iterations…"

[End of the session]

Appendix D. Testing session with students
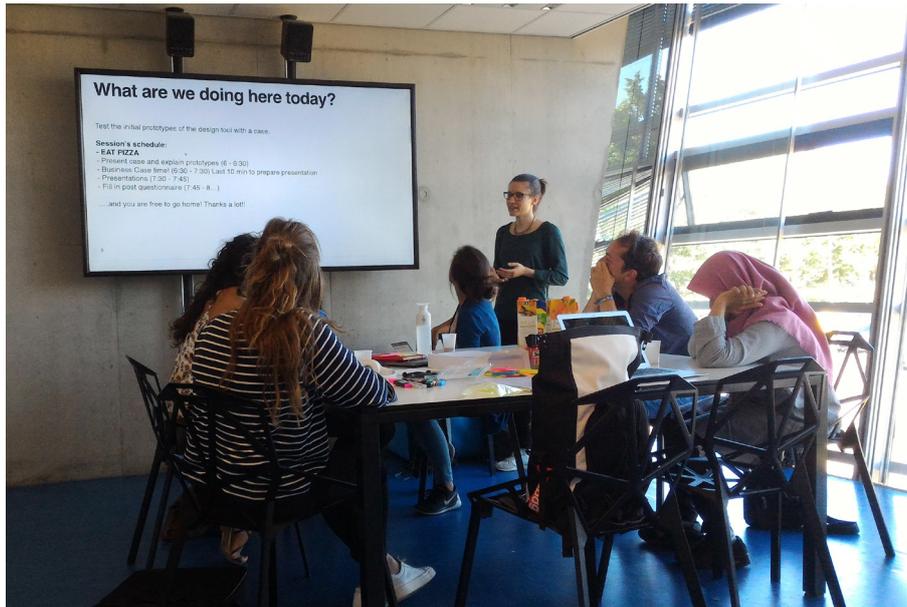
The graduation student explaining the plan for the session to the students and graduates that participated in it.

Set-up of the session

The session was conducted with 5 students and 1 graduate from the MSc. Strategic Product Design.

The plan for the session was the following:
- Present case and explain prototypes (6 - 6:30)
- Student create a business idea on the case explained by using the tool (6:30 - 7:30)
Last 10 min to prepare presentation
- Presentations (7:30 - 7:45)
- Fill in post questionnaire (7:45 - 8:15)

Methodology used for the testing

The main part of the session was asking the students to face a "business case", an exercise that students from the Strategic Product Design master face usually. They are presented a case and with a limited amount of times they have to come up with a business idea, or business proposition and present it to the group.

This time, students worked in two teams of three people, and each team was asked to present they idea plus their personal reflections and feedback on the usage of the tool prototype. The session and the presentations of the participants were recorded, to observe and remember later on their main struggles or positive interactions with the tool prototype.

The last exercise of the session for the participants was to fill in a questionnaire with open-ended questions about their experience using the tool. The questions were focused on testing if the requirements that had been set for the design of the prototype had been successfully implemented.

Material for the session

Presentation

Strategic design for societal challenges
Tool testing session

1

Wait, but... what are societal challenges?

EU Horizon 2020 definition of societal challenges:
challenges:

- Health, demographic change and wellbeing;
- Food security, sustainable agriculture and forestry, marine and maritime and inland water research, and the Bioeconomy;
- Secure, clean and efficient energy;
- Smart, green and integrated transport;
- Climate action, environment, resource efficiency and raw materials;
- Europe in a changing world – inclusive, innovative and reflective societies;
- Secure societies – protecting freedom and security of Europe and its citizens.

5

What is the graduation about?

Creating a design tool for the strategic design studio Oak & Morrow to tackle projects related with societal challenges.

- Strategic design
- Futures thinking

2

Projects related with societal challenges

http://europetomorrow.org/social-innovation-in-the-netherlands/

6

What are we doing here today?

Test the initial prototypes of the design tool with a case.

Session's schedule:
- EAT PIZZA
- Present case and explain prototypes (6 - 6:30)
- Business Case time! (6:30 - 7:30) Last 10 min to prepare presentation
- Presentations (7:30 - 7:45)
- Fill in post questionnaire (7:45 - 8...)

....and you are free to go home! Thanks a lot!!

3

Case

Problem:
Small producers in the south of Europe are **struggling to be financially sustainable** due to the **price pressure** that large food store chains from the north of Europe put on them. On the other hand, consumers from those countries are paying a **much higher price for products** that could be cheaper if bought directly from the producer.

The **logistics infrastructure** connecting south and easter Europe small producers to "richer" Northern European markets is often **detrimental (parcel service costs, trucking service costs** etc.). Also, richer Northern European food markets, are **dominated** by oligopolistic structures: a **few large food store chains** which simply do not bother to buy from small-scale producers, unless there is a price benefit, while the remaining institutional clients mostly do not order enough of one item at once to make an international shipment economically viable.

7

Wait, but... what are societal challenges?

"'Social innovation' refers to the new strategies, concepts, ideas and organizations that strive to provide solutions for serious social challenges – from job opportunities and education to health care, social engagement, and environmental problems."

Waag Society 2012

4

Case

Additionally, large food store chains generate more **food waste** that any other similar business, with a **30% of the products** produced being **thrown away** before they even reach the shelf (due to strict internal filters on the desired **aesthetic** of the product). This increases as well the selling price of the product, but decreases the value of their product for the small producers.

8

Case

Client: Dutch entrepreneur with contacts with agriculture cooperatives from Spain.

Brief: Developing a **food shopping platform** that connects **directly** small producers (farmers and agriculturists) from the south of Europe with consumers in The Netherlands.

9

About the tools you are going to use, I will explain you per group...

...thanks again and have fun!

10

Qualitative questions

Below are 7 questions. I ask you to answer them regarding the experience you just had using the tool. Please try to elaborate on your answers and reflect your true opinions on the value of using the design tool. Remember that there are no "right" or "wrong" answers - your personal opinion is what counts.

1. Did the tool assist (help, guide) you and your team in designing for societal challenges? Why?

_____
_____
_____

2. How applicable is the tool for being used during the "Fuzzy Front End", or initial phase of a project? Please elaborate.

_____
_____
_____

3. How applicable is the tool for being used in a "workshop-session" setting with the client of the project? Plese elaborate.

_____
_____
_____

4. Did the tool allowed you and your team to map the current situation of the context of the project (the current reality of the client, of the place, of the users, etc.)? Why?

_____
_____
_____

5. Did you experience a clear flow of turning input (collected information) into output (generated information, conclusions, final result)? Why?

_____
_____
_____

6. Did the tool influence you and your team to generate solutions with a focus on delivering ongoing value (solutions that are socially, environmentally, economically sustainable in the long term)? Why?

_____
_____
_____

7. Did the tool facilitate you and your team to design concrete, practical and tangible solutions? Why?

_____
_____
_____
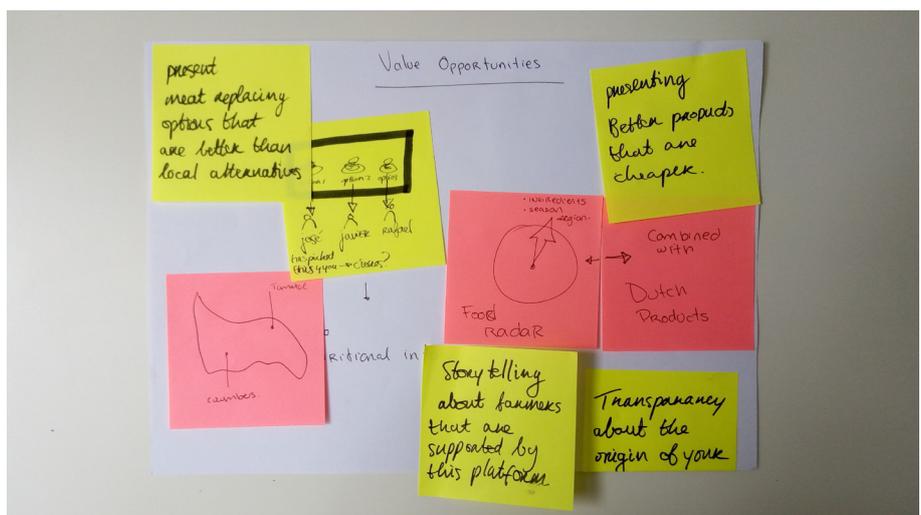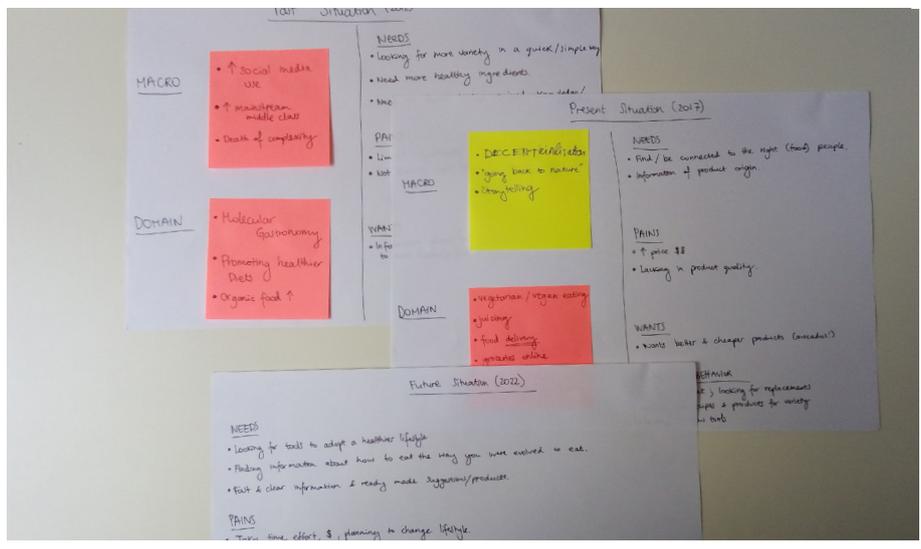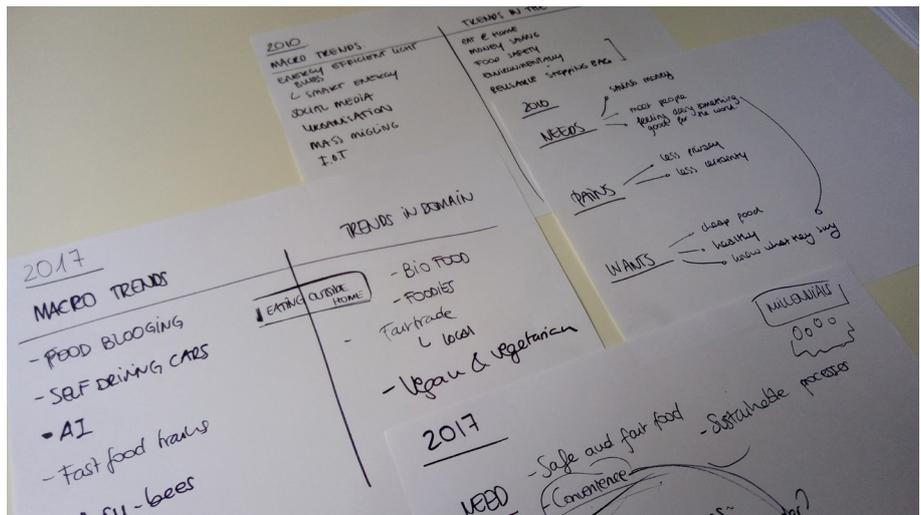
Some of the material the participants produced for the business case while using the tool prototype

One of the teams' questionnaires answers

One of the participants wrote down her comments or feedback on the usage of the tool prototype while working in the case

Appendix E. Co-creation session
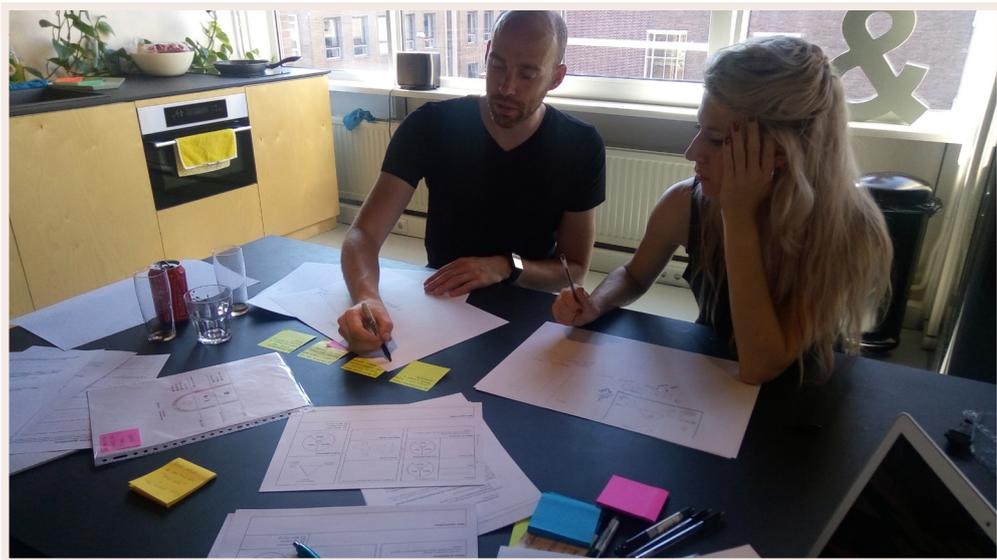
Jeroen van Geel and Sophia Altekamp, the participants of the session, discussing and sketching their ideas regarding the second prototype.
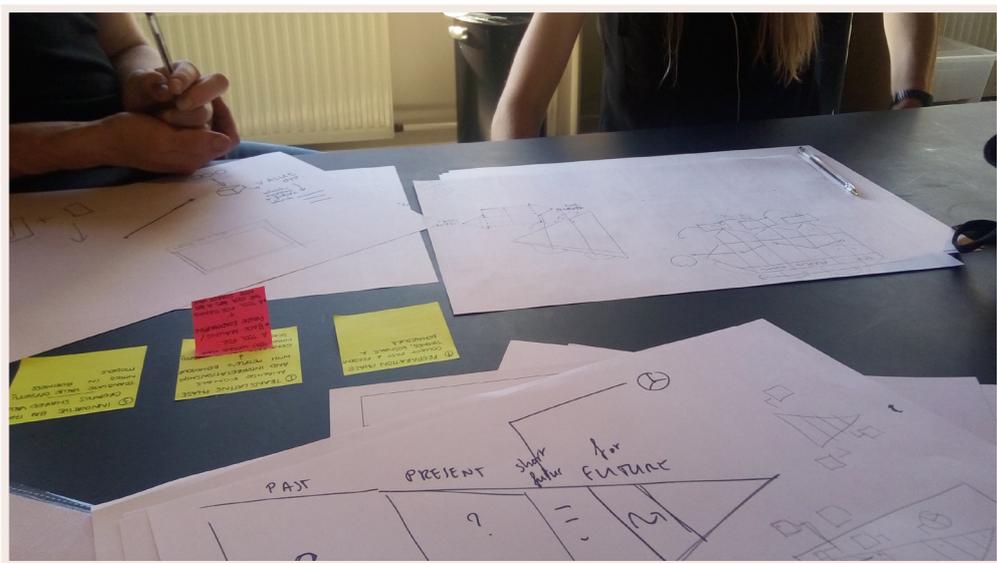
Close-up to the different sketches that the participants were discussing at that moment in the session

Transcripts of the moment of presentation and explanation of the tool

(The participants of these conversation are the designers of Oak & Morrow Jeroen van Geel and Sophia Altekamp, and the graduation student Alicia Calderón.)

Alicia explains:
Futures thinking is a long and time consuming process, therefore I divided it in different phases. The exercises and tools per phase would come together into a toolkit, and could be done as a complete process or per separate.

The first phase can be the most time consuming, because of needing to search for the trends or signals. (These could be done individually or with the client with a special structure).

This can be done in many different ways, but.. *"The easiest way is to have al already pre-done set of cards that collect trends in a pretty broad space of time and that include all kind of domains to make it applicable to all kind of societal challenges... you can do something like a cards with trends for societal challenges, but then it means that after X years you need to do it again".*

Jeroen: *"I was very inspired a while ago by a company... (story about the mattresses delivery service)... you have two sets of cards that you have to combine, one is the market or the focus area (people, animals or healthcare...) and the other is, 'disrupting this field' or is a way to combine it, like 'automating' 'healthcare'..."*

Sophia: *"Basically, you do create a set of cards beforehand, but you create something where people can fill in the blanks, so they know exactly...if they go research or if they have a specific client or direction they can pick those things"*

Jeroen: *"Yeah, but the main thing is to make you look in a different way, to pivot the way you look at the market. One of them can be a set (he maybe meant fixed) one, so for example... if you just want to come up with ideas you combine everything (Jeroen points at a drawing of 3 card decks he has just drawn) but you can also say, this one is set, because I want to do something in the home, and then you pick one here (he points at the second deck of cards) and you pick one here (he points at the third deck of cards) and you combine it".*

Alicia: *"It could be interesting to do it with societal challenges that are X number of topics and then have another deck for human behaviours. It has been already done, a cube of behaviours, so you could do it even more focused, a cube for behaviours for societal challenges, so more behaviours towards sustainability, etc."*

(...)

Alicia: *"The second phase is the core of the toolkit, is what would be the long session, this is the prototype of tool that i tested; this is to translate the information you have, dry data, into something. I focus in the tool so far in creating value opportunities, so it is totally user focused and it is talking about what things would add value to the user.... I can explain in two ways: on the one hand you have the BMC and you only focus on the part of the value proposition, because the idea is that all the other parts can be arranged if you have a good value proposition, so what I want to find especially for societal challenges are value opportunities, with that outcome we can jump in the next phase that it is creating a business surrounding it, so the business innovation part. The other way of looking at it is that if I figure out what is going to be the future behaviour of the user that it where we can find an idea that is valuable in the long term and that is when we can aim to the whole "societal-challenge systemic-impact-thing". So I needed those two things: the focus on value, and how do we figure out the future behaviour of the user."*

Jeroen: *"So, you get input, and then there is this magical box and that is value..."*

Alicia: *"Yeah, and you should get as an outcome value opportunities"*

Jeroen: *"...and this is the method, and where do these future scenarios (pointing at prototype 1) come from?"*

Alicia: *"oh, no, this is something I added but in the tool I have now (prototype 2) there is not a moment of creating future scenarios, but it makes sense also, it depends. The thing is that scenarios is a very strong tool within Futures thinking... but is very straightforward..."*

Jeroen: *"So, can you give an example? Value opportunity is if we would bring electricity to remote areas, kids can learn later until in the evening, so they can do their homework in the evening... that's a value opportunity?"*

Alicia: *"Could be. In the testing they really... it changed a lot, it depended on... some people were really broad,*

some people were...”

Jeroen: *“...but wasn't it a future scenario?”*

Alicia: *“No, a future scenario would be 'kids in Africa would live like this, would have this things surrounding them...”*

Jeroen*: “Oh..., ok.”*

Alicia: *“So here (referring to the prototype 1) I only added it because if, on the practise, I see that is very difficult to come up directly with value opportunities, what this tool is to allow you to create a future scenario, so you would have future behaviour and you would have a view of the future because you know the trends, so then it that scenario it is easier to come up with a value opportunity. So in the case that it is very difficult, we could do like this; this could be a step before the value opportunity...”*

(About phase 3: Business Model Innovation)

Alicia: *“Here is the part where you have, 'ok, we have a value opportunity, so we do a business out of it', so you conceptualise the very abstract idea that was the outcome of this (phase 2). The perfect scenario would be that I come up with a way of changing a bit the BMC so that it is more focused on societal challenges, and there is a paper that has a BMC made in three parts, so it has the normal BMC, the one applied to Social and the one applied to Sustainability, so yeah... that it's a lot, but the idea is to change the original BMC, so that the focus is not on the revenue stream but still in the value, to make it bigger.”*

Alicia: *“Another nice tool is Backcasting; what they do is to create an idea of the future, so 'oh, here we have seen a value opportunity, we think this business would be super cool', but then how do you get to that? What they do is to think in steps up to the present, from that future idea. So your ideas, you want them to be scalable, so what could be is that here (pointing to the BM creation moment) you really dream, so to dream about what would be the future business in the perfect state and then how do we start it... yeah, it is a roadmap backwards.”*

Jeroen: *“Isn't a Roadmap always backwards? Or two directions? ...we always say to define, we first put the points in the horizon, then we know where we are, and then we start creating the road, but then automatically you also start moving backwards because you had the point in the horizon...”*

(everybody agrees that there are similarities)

(About phase 4: Collaborative process)

Alicia: *“The final part is the complex one. We are talking about societal challenges, and you guys wanted to have a real deep impact, a systemic change, well... that's a hell of a lot! So, if we are really tackling it, we have to talk about a final stage, after you have delivered your outcome that is the Business Innovation idea. All the things I've learnt on societal challenges and social innovation is that to jump from the stage of sustaining, that is where your solution would be; so a solution that has a business model, therefore is supposed to be sustainable, then to jump to 'scaling' and 'systemic change' you need to start creating a network of collaboration (policy makers, experts from the field, academics, etc.).*

Jeroen: *“You know... maybe it helps..., do you know Waka-Waka? So, the interesting thing is that you can put in the market and kids can in the evening do their homework, but in a lot of countries the dads actually don't accept it.”*

Alicia: *“Yeah, exactly, even when you have a really idea, a really good product, it is difficult for it to take off because of cultural problems, for example. So yeah, that is why the experts on social innovation say that it is so many steps, all these stages are so detailed... but if you are talking about systemic impact that is what it takes. So, I would like to have at least a white paper on the toolkit that explains how you should move towards deep change...”*

(Alicia starts to present different tools that are being considered for designing the tool for the Phase 2:translating, to do the exercise of collecting and processing signals, etc. Jeroen expresses confusion about the differences between trends and drivers).

Jeroen: *“I am a bit confused with... I think you put drivers and trends in the same thing, and for me there is something like, needs and... a trend is already a translation of something, so trend is something for me that it is happening because of certain aspects, I think these aspects are more interesting than the trend.”*

Alicia: *“Those are drivers, (or signals)”*

Jeroen: *“Yeah”*

Alicia: *“So you would collect only drivers, or what do you mean?”*

(Discussion without conclusion)
(...)

(Alicia introduces them the Futures triangle)

Alicia: *"I don't know if you would agree more with mapping it differently like they do here in the Futures triangle, that they say: you have the 'pool of the future', so images of the future and how they describe it here is as if you have a way of seeing the future, and depending on the 'lenses' you have, so it can be really technocentric, etc. then you see more different trends that others. It can be also 'push of the present', so data that you see, like the heating (the increase of the temperature), and then the 'weight of history' that is barriers of change because there has been a past."*

Jeroen: *"I like this one!"*

Sophia: *"This I think is super clear... (...) Then I see like a couple of scenarios immediately in there"*

Alicia: *"Yeah... 'cause then in the tool, the idea is to start with trends, the ones you focus on, but then instead it could be something like this (points at something - unknown-), and then starting from plausible futures (unintelligible)."*

(Talking about creating scenarios, Jeroen discusses that each individual would create them through their own "lens")

Jeroen: *(About a sketch of Sophia) "I am missing in here the context within you will look at it, that is the lens (...) the lens with which you look at this, changes what you write (talking about writing an scenario). If you would write this as my mum, you would write it differently than if you write it as Alicia. There is a lens attach to this, the user, the audience... The pull of the future is different for my parents, for example, than from others..."*

Results from the session.

Visuals:
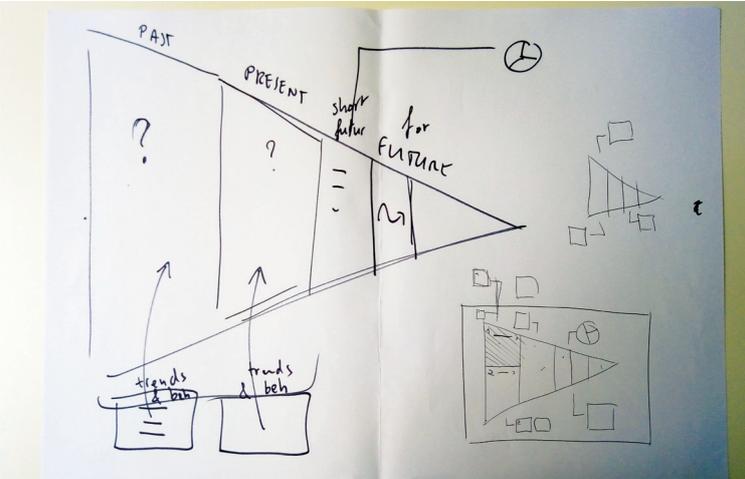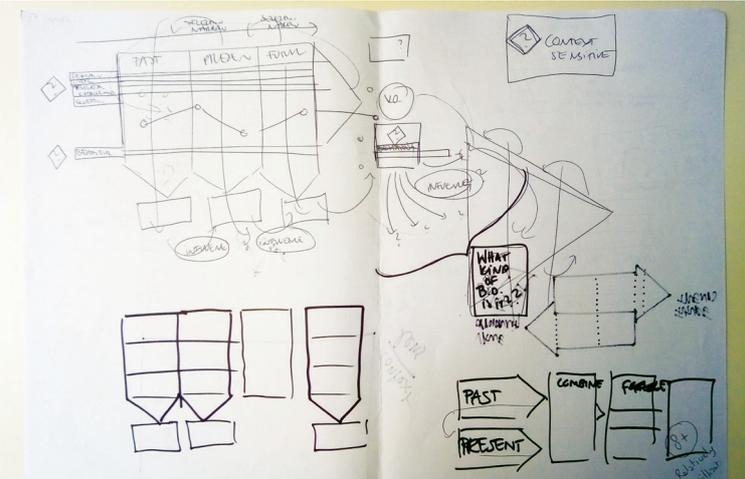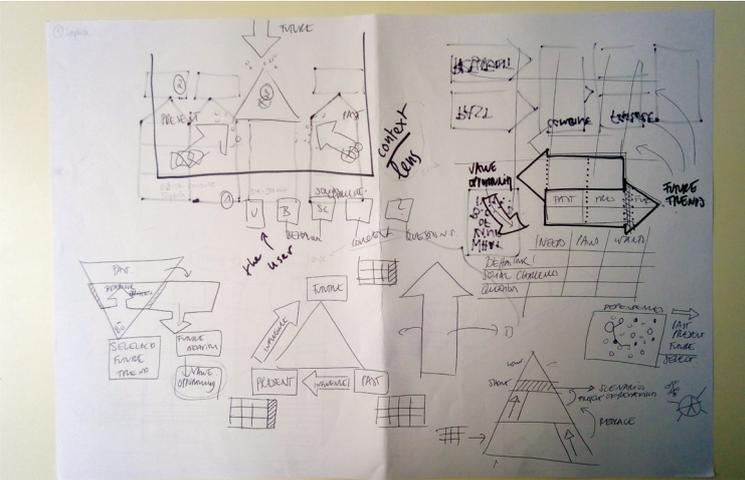
Results from the session.
Processed feedback from the session:

Reflections that the student has made after the session or while transcribing the most interesting conversations.

After the session conversation with Sophia about the 'Lens':

She sees the tools as structure that defines the field of play, the cards would help you move in the field, especially in the beginning, generating the information that you are going to take along the different tools. Before all that, you have to choose and develop a Lens or view with what you are going to observe and deal with each step of the process. The 'Lens' represent the values and goal and/of the target audience of the project. About 'lenses' applied to define societal challenges, pre-done lenses could exist on specific examples of societal challenges to serve as an example.

The 'lens' can be offered by Oak & Morrow as a product itself to clients; lenses are made and tailored to each project and target audience.

The concept of the lens makes sense with the theory of Futures thinking, that explains that in the practice of Future thinking it is needed to make explicit beforehand the values and goals that are being served, because depending on the values different views of the future, the preferable future for example, would be created.

Preparing phase
It would be good to have a deck of cards that have information about societal challenges or trends on that, and then another set of cards or dice with behaviours, so that it would help you structure the search for more trends or generate the ones you already know. This process could be done by the designers alone or with the client, Jeroen thinks. What is the meaning of trends, signals and drivers? Those concepts are too broad for the designers and it would be better to collect the input following the Futures triangle.

Translating phase
Start with defining your LENS. This should help you define the focus area and target group, and keep the societal challenges in mind. One idea related with this is to have societal challenges lenses, that are

documents related with each topic within societal challenges.

Having a structure that follows the same flow of the BA Model would be convenient for the studio and would make their tool more compact.
The designers liked the idea of thinking about the "Effect on behaviour", and the discussions were more about the flow on how to get to that.

The tool has to facilitate making very visual what has to be collected and the outcome, for the client and also for the studio; what has to be done in each step has to be very clear and explained in detail but also easy to guess with the visual.

The tools has different steps that lead you to an outcome for each part of the tool, each of these steps is an exercise in most cases, such as the one of figuring out the relationships among collected input to select the important (trends, drivers, signals) to focus on in the rest of the process.

The outcome of the tool has to be more tangible than an scenario. The designers insist in that they are not futurists or forecasters, they are designers and they create tangible outputs. Following that line of thinking, 'value propositions' would be a good outcome.

Business innovation
Jeroen believes that it is not needed to focus so much on businesses. He thinks it the tool here could be something closer to a sustainability model canvas than a business model canvas. Other comments here were that this model that helps you define the concept could include questions to double check that your focus on societal challenges is still there. Something such as the IOT design manifesto or the Ethics for Designers graduation was mentioned here.

Many structures with a triangle were drawn, but in the end the designer agreed that it was nice to have a flow like the BA Model, no matter the shape.

Appendix F. Implementation session

Sheet with the set-up or schedule of the session used
to display it during the session:

Set-up of the implementation session

Opening (15:30 - 15:35)
- Objectives of the session

Presentation about Futures thinking and Systemic impact (15:35 - 15:45)
- Purposes of Futures thinking and benefits of these
- Process of Futures thinking
- Process of Futures thinking in comparison, next to O&M design process
- Main activities to achieve these purposes
- What is needed to go from sustainable to systemic impact
- Questions?

Presentation of the toolkit and workshop (15:45 - 16:45)
- Show how the toolkit tackles these activities. Questions?
- Present Case (very briefly)
- Re-enact main activities with the toolkit and a case and co-create around it

Questions for co-creation:
- *How would you use this tool?*
- *How would you do this exercise instead?*
- *What level of flexibility do you need in this tool to be able to use it in any kind of project?*

Final discussion (16:45 - 17:00)
- Discuss how to integrate Futures thinking at the Oak & Morrow design practises

Questions for the discussion:
- *How would you implement a more future oriented, aiming to positive social impact mindset in the studio?*
- *How would you blend the toolkit with your current tools? With your current process? Within your offerings to clients?*
- *How would you market the toolkit to make acquisition of projects related with societal challenges?*

"Presentation about Futures thinking and Systemic impact" shown to the participants of the session, designers Jeroen van Geel and Sophia Altekamp, as first activity of the program:

**Futures thinking
and systemic impact
workshop**

1

Session's set-up

- Opening (15:30 – 15:35)
- Presentation about Futures thinking and Systemic impact (15:35 – 15:45)
- Presentation of the toolkit and workshop (15:45 – 16:45)
- Final discussion (16:45 – 17:00)

2

Objectives of the session

Explain what is Futures thinking, its purposes, process and activities.

Explain briefly what is needed to move from a sustainable concept to having a systemic impact.

Present the toolkit and use it with a fictional case to co-create about the limits of its format.

Discuss about implementing Futures thinking and the toolkit at Oak & Morrow.

3

Futures thinking

4

"Futures thinking is the systematic study of the future; it is about studying what actions to take in the present to create a future that will be as desirable as possible."

5

Purpose

"the main purpose of Futures thinking is increase the control over the future by **studying the present** (e.g. people's present behaviour) and **collecting information** that allows to **create different images of the future**."

6

Purposes

Exploring possible futures by analysing images of the future

create "images of the future" by observing the present and people's present behaviour from many different perspectives.

Develop visions

visions are created from recognising the "seeds of change" in the past and the present, and capture changes latent in the present to extrapolate them into future realities

Play an orientating role

by comparing the past, our beliefs about the present and our expectations about the future (Bell, 1997), people can gain perspective on where they have been, where they want to go, and at what point they are in the transition to that future

Examine goals and values

Futures thinking is focused on values and comes with a moral evaluation of the preferable; unlike normal sciences, futures research is value-rational.

Develop anticipative thinking

developing a long-term versus a short-term thinking

Observe the world as an integrated system

perceive the world as a whole, where every specific topic is interrelated with the society and the global system

7

Futures thinking process

Interrelations

Scanning – looking for signals

Visioning futures

Shared history
Futures triangle

Environmental scanning
Trend analysis
Emerging issues analysis

Casal layered analysis
Four quadrant mapping

Scenarios

Backcasting

Mapping timelines
how we got here?

Anticipating the future
Emerging issues

Timing the future
Patterns of change

Deepening the future
Patterns of change

Creating alternatives
Scenarios + innovating solutions

Transforming the future
Co-creating pathways

8

78

Design value: "Positive Social Impact"
=
Socia innovation's
"Systemic Impact"

9

SOCIAL INNOVATOR SERIES
WAYS TO DESIGN, DEVELOP
AND GROW SOCIAL INNOVATION

THE OPEN BOOK OF SOCIAL INNOVATION

Robin Murray
Julie Caulier-Grice
Geoff Mulgan

THE YOUNG FOUNDATION

10

Young foundation's spiral

SOCIAL INNOVATION SPIRAL

1 Prompts
2 Proposals
3 Prototypes
4 Sustaining
5 Scaling
6 Systemic change

Source: Murray, R., Caulier-Grice, J. and Mulgan, G. (2010) 'The Open Book of Social Innovation' London, NESTA and the Young Foundation.

11

Young foundation's spiral

SOCIAL INNOVATION SPIRAL

1 Prompts
2 Proposals
3 Prototypes
4 Sustaining
5 Scaling
6 Systemic change

Source: Murray, R., Caulier-Grice, J. and Mulgan, G. (2010) 'The Open Book of Social Innovation' London, NESTA and the Young Foundation.

12

Questions?

13

Toolkit

14

Structure of the toolkit
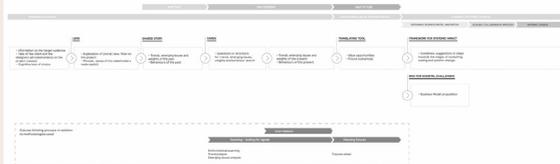
15

Tools within the toolkit

16

Main tools

17

Main tools

18

Main tools

Case

Problem

Small producers in the south of Europe are **struggling to be financially sustainable** due to the **price pressure** that large food store chains from the north of Europe put on them. On the other hand, consumers from those countries are paying a **much higher price for products** that could be cheaper if bought directly from the producer.

The **logistics infrastructure** connecting south and easter Europe small producers to "richer" Northern European markets is often **detrimental (parcel service costs, trucking service costs** etc.). Also, richer Northern European food markets, are **dominated** by oligopolistic structures: a **few large food store chains** which simply do not bother to buy from small-scale producers, unless there is a price benefit, while the remaining institutional clients mostly do not order enough of one item at once to make an international shipment economically viable.

Additionally, large food store chains generate more **food waste** that any other similar business, with a **30% of the products** produced being **thrown away** before they even reach the shelf (due to strict internal filters on the desired **aesthetic** of the product). This increases as well the selling price of the product, but decreases the value of their product for the small producers.

Case

Client: Dutch entrepreneur with contacts with agriculture cooperatives from Spain.

Brief: Developing a **food shopping platform** that connects **directly** small producers (farmers and agriculturists) from the south of Europe with consumers in The Netherlands.

**Futures thinking
and systemic impact
workshop**

Requirements within the phases

- They tell what the toolkit has to accomplish in each step.
- They point which tools, per requirement, already aim at something similar and could serve as inspiration.

Appendix G. Oak & Morrow's Futures thinking toolkit

In this appendix, all the templates or canvases produced for the tools of the toolkit can be seen.

Lens

Project _____

Societal challenge domain

Target audience

Societal manifesto

Oak & Morrow Design Values: Other values of the project:
- *Positive social impact*
- *Aim for a deep change*
- *Tackle the big picture*
- *Sustainable in the long term*
- *Collaborative process*
- *Just make it work*

Cognitive lens

☐ Continued progress
☐ Gaia
☐ Collapse
☐ Globalism
☐ Back to the future
☐ Transformation

Societal challenges domains

These are the domains or categories of societal challenges that are given as example. The list is meant to be used as starting point or inspiration, as societal challenges can be defined with many different terms. These are some inspired by references such as 7 societal challenges defined by the European Union (REFERENCE), or the six societal trends identified by the European Commission in their publication "Guide to social innovation".

Health
Healthcare
Wellbeing
Demographics
Migration
Ageing
Social inclusiveness
Unemployment
Food security
Sustainable agriculture (and local production)
Ethical goods and services (e.g. Fair trade)
Housing
Environmental trend and climate action
Resources and raw materials efficiency
Water and sanitation
Waste management
Climate change
Secure, clean and efficient energy
Sustainable and efficient public transport
Traffic management
Safety and secure societies
Protecting freedom
Education
Economic development
Sustainable financing
Poverty
Child poverty
Active citizenship
Digital society

Cognitive lenses

The futures triangle tool (Inayatullah, 2008) deals, among other Futures thinking concepts, with "images of the future". These are described as specific views of the future; somehow the type of "lenses" through what we see the future. This idea, of the possibility of different views or perspectives on the future is common in Futures studies, and the main general remark about it is that it should be made explicit for each project where the future is going to be explored. This is due to our worldview affecting the type of information we can be more inclined to collect or inspect, or our perspective on it. A similar concept to the images of the future are the "scenario archetypes" (Dator, 1979; www.futures.hawaii. edu) that, although focused on scenarios, also aim at defining a pre-established perspective that is going to affect the outcome of a futures thinking process. Mainly inspired by these two concepts, the toolkit includes within the "Lens" tool, the step of choosing a "Cognitive lens", or worldview with what the rest of the project will be approached. Many different types of Cognitive lenses can be created, that would deal with different perspectives on the future; the purpose of the Cognitive lens is to make this perspective and the values in line to it explicit, no matter which are these.

As a start point, the following Cognitive lenses have been defined from the ideas of images of the future that Inayatullah (2008) describes and the different scenario archetypes that Dator (1979; www.futures. hawaii.edu) discusses. The "worldviews" defined by both futurists have been directly referenced or combined to propose the following Cognitive lenses:

Continued progress:
"Where current conditions are enhanced: more products, more roads, more technology, and a greater population. The man as the centre of the world, and a belief in rationality. Technology is considered the solution to every problem." (Inayatullah, 2008) (Dator, 1979)

Gaia:
"The world is a garden, cultures are its flowers; we need social technologies to repair the damage we have caused to ourselves, to nature and to others. this future seeks to arrest growth and find a balance in the economy and with nature. It is a balanced, softer and fairer society. Community is decisive in this future. Becoming more and more inclusive is what is important. Human values are first here. Technology can be a problem. Partnership between women and men, humans and nature and humans and technology is needed. This is challenging the very notion of "man"." (Inayatullah, 2008)(Dator, 1979)
 Collapse:
"This future results as continued growth fails. The contradictions are too great: between the economy and nature; between men and women; between the speculative and the real economy; between religious, secular and postmodern approaches; and between technology and culture. (Dator, 1979). A belief that man has reached his limits, indeed he has overshot them: world inequity, fundamentalism, tribalism, nuclear holocaust, climate disasters all point to a worsening of the future." (Inayatullah, 2008)

Globalism:
"We need to focus on ways to come closer as economies and as cultures. Borders need to break down; technology and the free flow of capital can bring riches to all. Traditionalisms and dogmas are the barriers stopping us from achieving a new world." (Inayatullah, 2008)

Back to the future:
"We are past our prime; we need to return to simpler times, when hierarchy was clearer, when technology was less disruptive, when the Empire was clear. Change is too overwhelming; we have lost our way, and must return." (Inayatullah, 2008)

Transformation:
"Transformation comes out either through dramatic technological change (artificial intelligence eliminates the courts, bureaucracy and many forms of governance; genetics changing the nature of nature, for example) or through spiritual change (humans change their consciousness, not just values, but the experience of deep transcendence)." (Dator, 1979)

Cognitive lens

Gaia

"The world is a garden, cultures are its flowers; we need social technologies to repair the damage we have caused to ourselves, to nature and to others. this future seeks to arrest growth and find a balance in the economy and with nature. It is a balanced, softer and fairer society. Community is decisive in this future. Becoming more and more inclusive is what is important. Human values are first here. Technology can be a problem. Partnership between women and men, humans and nature and humans and technology is needed. This is challenging the very notion of ''man''." (Inayatullah, 2008)(Dator, 1979)

Cognitive lens

Continued progress

"Where current conditions are enhanced: more products, more roads, more technology, and a greater population. The man as the centre of the world, and a belief in rationality. Technology is considered the solution to every problem." (Inayatullah, 2008)(Dator, 1979)

Cognitive lens

Collapse

"This future results as continued growth fails. The contradictions are too great: between the economy and nature; between men and women; between the speculative and the real economy; between religious, secular and postmodern approaches; and between technology and culture. (Dator, 1979). A belief that man has reached his limits, indeed he has overshot them: world inequity, fundamentalism, tribalism, nuclear holocaust, climate disasters all point to a worsening of the future." (Inayatullah, 2008)

Cognitive lens

Globalism

"We need to focus on ways to come closer as economies and as cultures. Borders need to break down; technology and the free flow of capital can bring riches to all. Traditionalisms and dogmas are the barriers stopping us from achieving a new world." (Inayatullah, 2008)
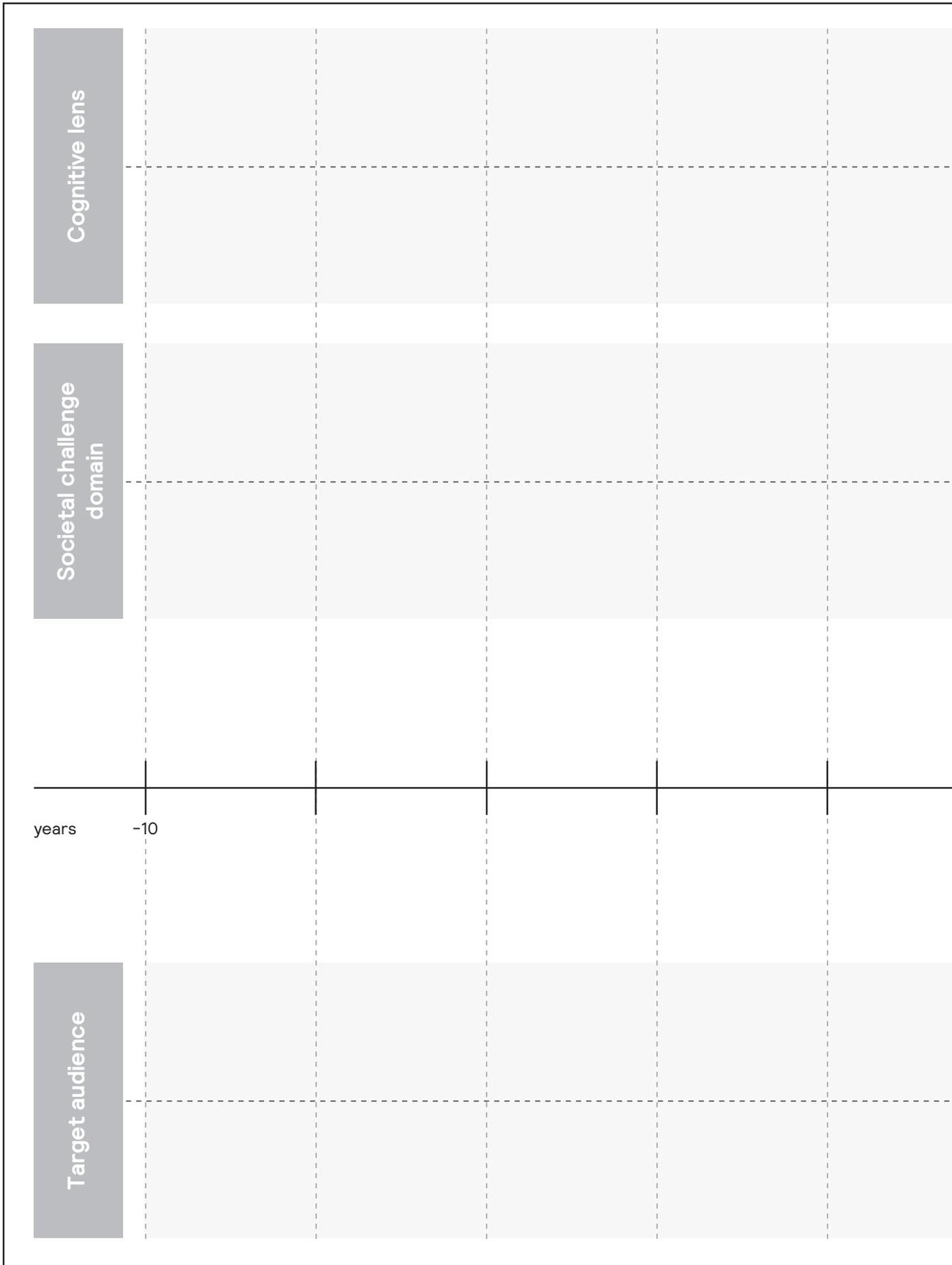
Cognitive lens

Back to the future

"We are past our prime; we need to return to simpler times, when hierarchy was clearer, when technology was less disruptive, when the Empire was clear. Change is too overwhelming; we have lost our way, and must return." (Inayatullah, 2008)
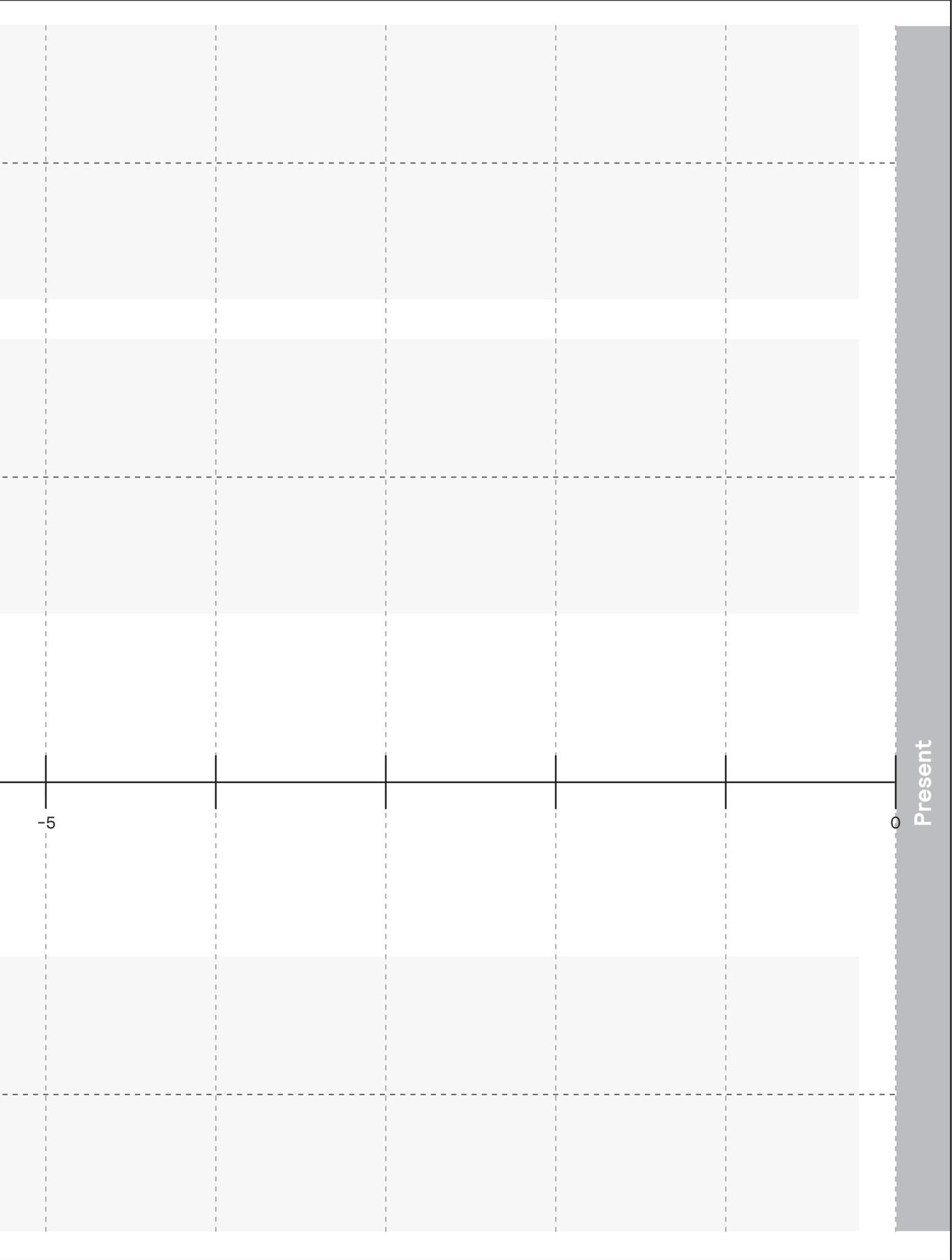
Cognitive lens

Transformation

"Transformation comes out either through dramatic technological change (artificial intelligence eliminates the courts, bureaucracy and many forms of governance; genetics changing the nature of nature, for example) or through spiritual change (humans change their consciousness, not just values, but the experience of deep transcendence)." (Dator, 1979)

Shared history

Cognitive lens

Societal challenge domain

years   −10

Target audience

-5

0

Present

Trend card

A focus on non-invasive enhancement

In the immediate future, cost, fear and ethics will be strong barriers to uptake of invasive augmentation and implants. Therefore in the short-term we see take up of wearables, hearables, pharmaceuticals and external brain-computer interfaces. We expect interest in e-skins to grow, particularly in the realm of fitness tracking.

Source: Foresight Factory

Trend card

Link identity to transactions

Inconvenience and delay are the biggest barriers to purchase. Seamless payment linked to identity can lubricate transactions and encourage spend. The expansion of biometric authentication systems eliminate the need for pins and passwords, and will secure and speed up the payment process.

Source: Foresight Factory

Trend card

Customised reality: hearables take centre stage

The arrival of wireless headphones effectively primes the market for accepting hearable devices. As well as offering superior audio quality, hearables offer a more invisible way to interact with technology, track biometrics and augment surroundings either by filtering out ambient noise or accessing additional in-ear information.

Source: Foresight Factory

Environmental scanning cards

Trend card

*Brands are about
to get bypassed*

Discovery is being transformed by platformisation. Alexa, Siri and a raft of smart household devices can order for you, sometimes even automatically when stocks are low. Brands can get bypassed in this world as consumers communicate only with the delivery mechanisms and outsource brand choice to them.

Source: Foresight Factory

Trend card

Craving and attempting simplicity rather than attaining it

It takes steely determination to follow the principles that make life simple: to declutter and tidy your home Marie Kondo-style, to apply the Getting Things Done methodology of David Allen and cut through distractions with Cal Newport's Deep Work focus. But more and more people are at least drawn to accept the challenge. This trend is about craving and attempting simplicity rather than attaining it.

Source: Huffington post

Trend card

Becoming aware of the Mr. Hyde side of technology

This awareness is especially acute for parents raising the first post-iPhone generation and seeing the compulsiveness and irritability triggered by screen usage in the developing minds of our littles. Your use of devices, and willingness to upgrade, will stay strong—but the sneaking sense that there is a very insidious Mr. Hyde lurking within this Dr. Jekyll of technology will grow.

Source: Huffington post

Disruptors analysis card

Open Google Scholar. Look for the latest scientific publications related to your topic. What is the subject of their research? Could it be somehow a disruptor or emerging issue of the field?

Trends are quantitative, figures related with them can be collected. Meanwhile emerging issues have no such clear facts or numbers.

Disruptors analysis card

Look for relatively small social collectives around the area of your project. On what topics are they working on? From what perspective? What type of workshops or talks are they giving?

Trends are mostly recognized by the general public, especially by professionals of their area. Meanwhile disruptors or emerging issues are not at the stage of being recognized by a group, but proposed by an individual or a minority.

Disruptors analysis card

Look for small scale educational events around the area of your project, such as graduation exhibitions or project presentations. What type of topics have the students worked on?

Emerging issues are as close to their very first notice as possible. Meanwhile trends establish as such when the topic has been repeatedly discussed.

Disruptors analysis card

What have been the topics of the last architecture biennale of the area that you are studying?

Disruptors are as close to their very first notice as possible. Meanwhile trends establish as such when the topic has been repeatedly discussed.

Disruptors analysis card

Look for this year's revelation artists in different disciplines. What is their current work about? What is their message? What are their concerns? (Check multiple disciplines, from poetry to street art)

"The sources of disruptors or emerging issues are crazy people, marginal people, offbeat publications and websites, in the recesses of the mind of some scientist or engineer, the concern of some artist or poet, or unpublished novelist" (Dator, 2009)

Disruptors analysis card

Look for tech savvy writers of the publications focused on innovation and ideas of the future. What are they talking about?

Trends can be discussed on the television news. Meanwhile emerging issues stay among alternative circles.

Weights analysis card

Political movements or powers

Taking into account your Cognitive Lens or perspective on the project, what are the main events or forces that could be a barrier to the change towards your worldview?

Weights analysis card

Human inherent behaviours

Weights analysis card

Figures of influence in the area

Taking into account your Cognitive Lens or perspective on the project, what are the main events or forces that could be a barrier to the change towards your worldview?

Weights analysis card

Religion's influence

Weights analysis card

Financial situation

Taking into account your Cognitive Lens or perspective on the project, what are the main events or forces that could be a barrier to the change towards your worldview?

Weights analysis card

Community's unspoken rules

Weights analysis card
_____

*Technological
developments*

_____

*Taking into account your
Cognitive Lens or perspective on
the project, what are the main
events or forces that could be a
barrier to the change towards
your worldview?*

Weights analysis card
_____

Limitations of science

Weights analysis card
_____

Social movements

_____

*Taking into account your
Cognitive Lens or perspective on
the project, what are the main
events or forces that could be a
barrier to the change towards
your worldview?*

Weights analysis card
_____

*Speed of growth
of industrial activities*
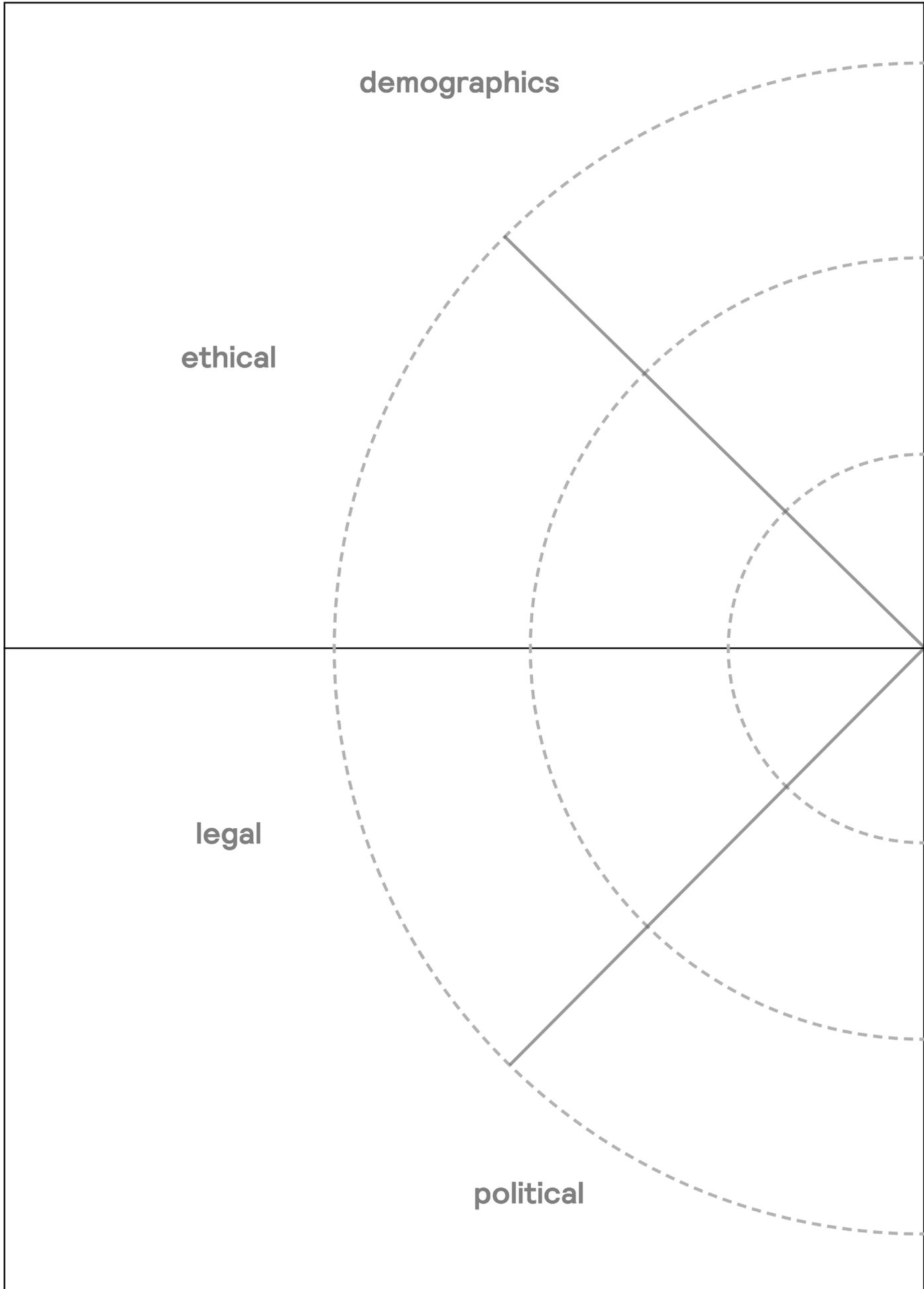
Weights analysis card
_____

*People's adaptation
rate*

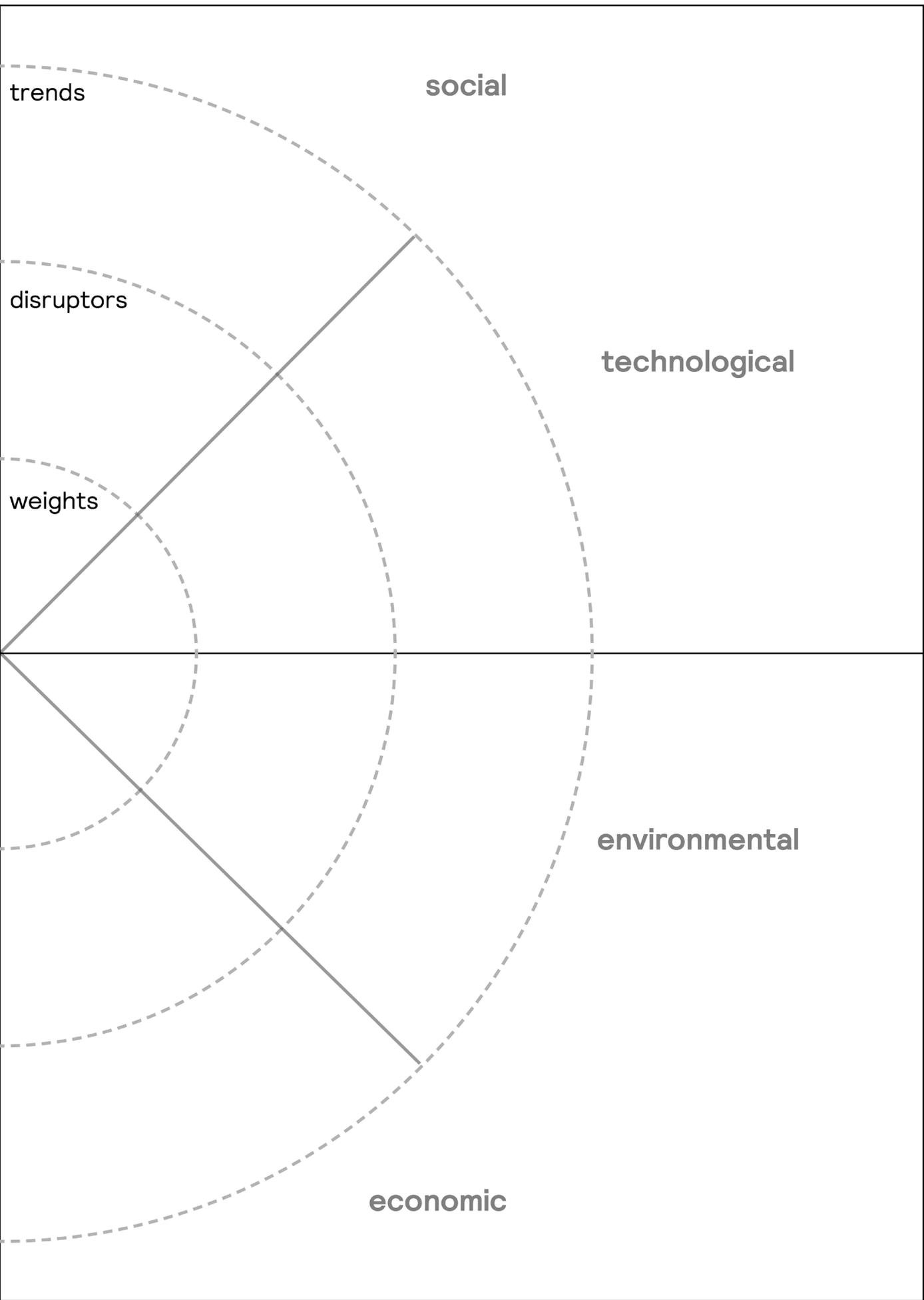_____

*Taking into account your
Cognitive Lens or perspective on
the project, what are the main
events or forces that could be a
barrier to the change towards
your worldview?*

Weights analysis card
_____

Current policies

demographics

ethical

legal

political
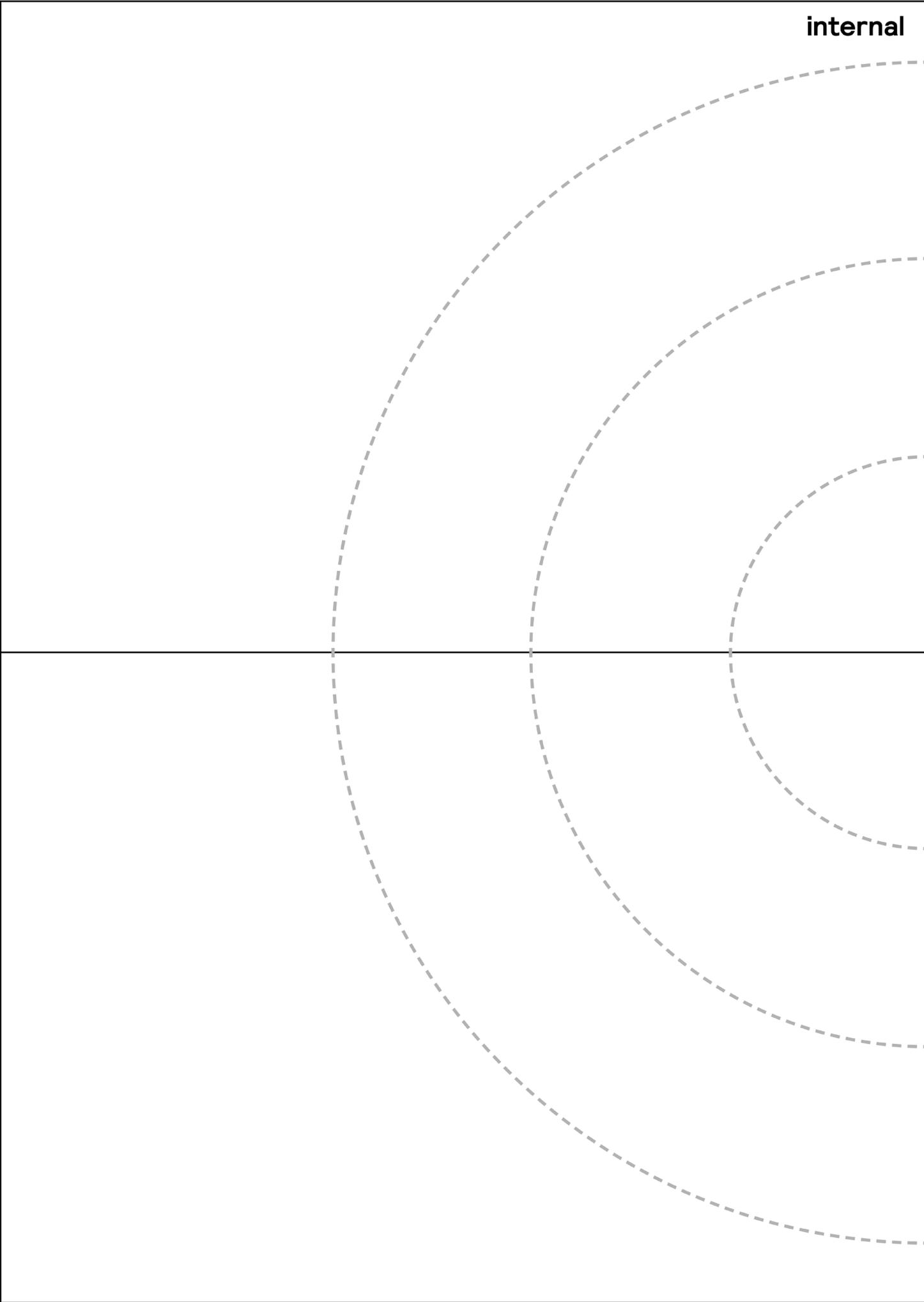
trends

disruptors

weights

social

technological

environmental

economic

Environmental scanning cards_Mapping dartboard
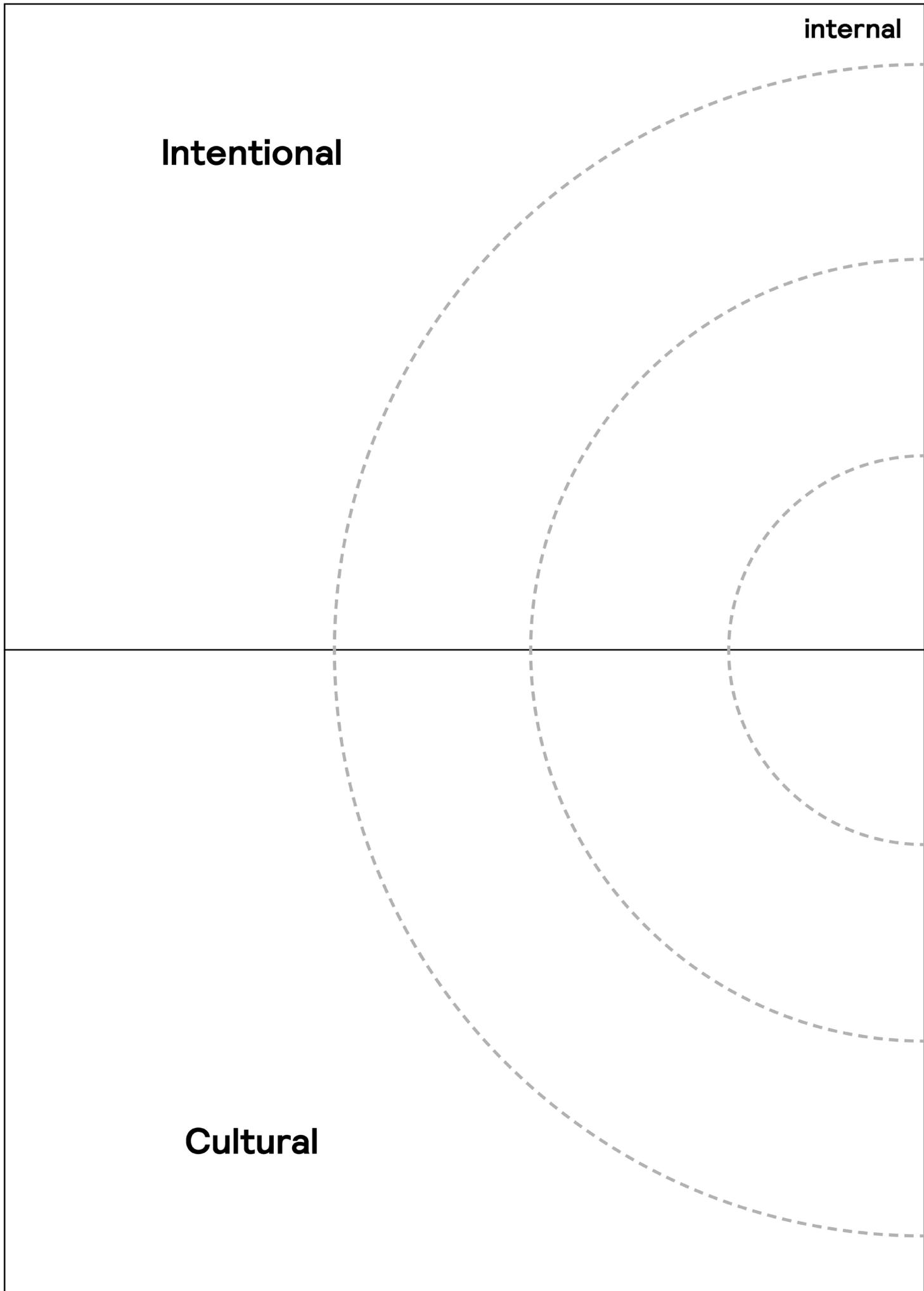
external
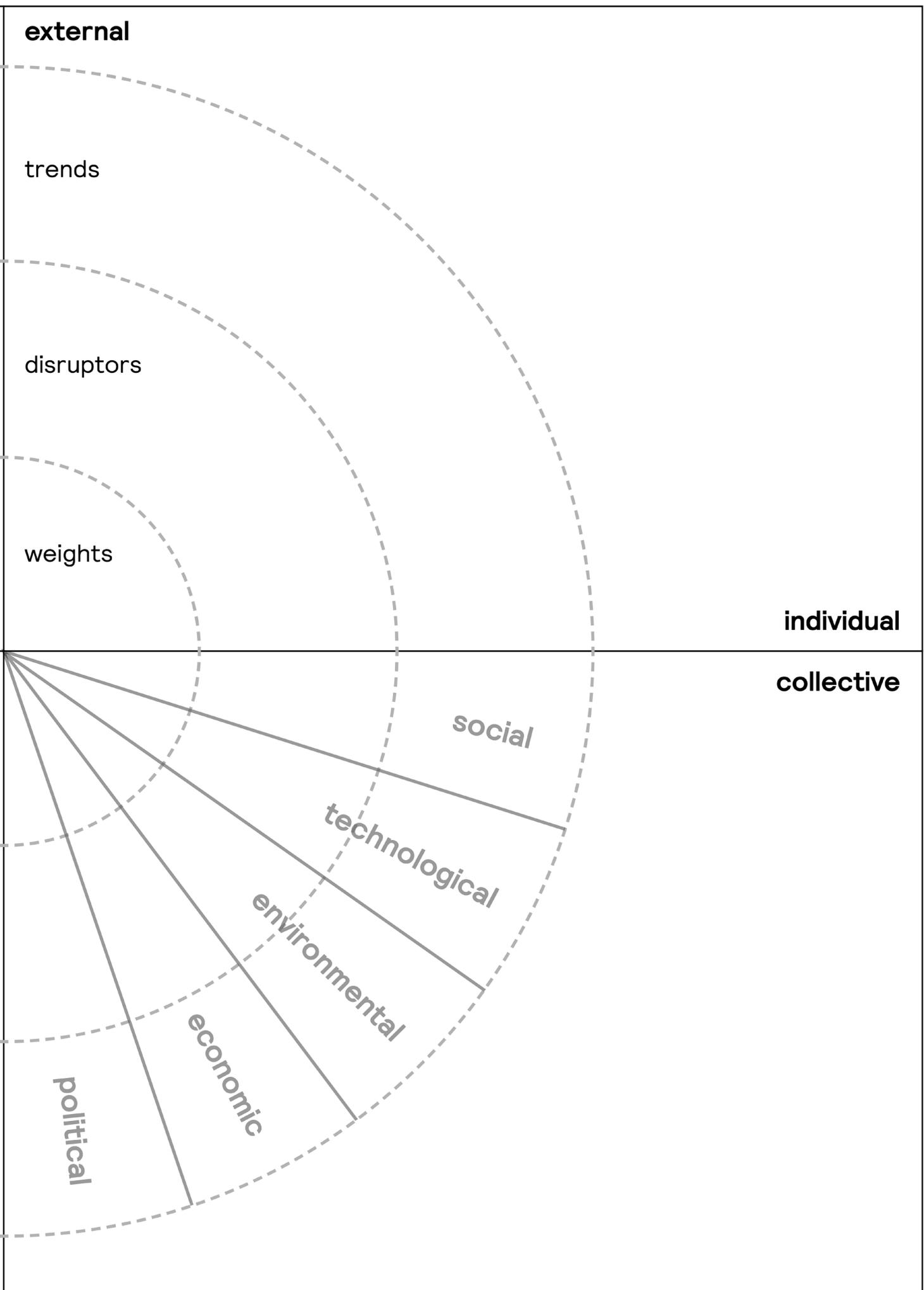
trends

disruptors

weights

individual

collective

social

technological

environmental

economic

political

internal

Intentional

Cultural

internal

external

Behavioural

trends

disruptors

weights

individual

collective

Social

Translating tool

1. Creating a future scenario

Trends

Disruptors   Weights

Future scenario

What is the future scenario that the trends, weights and disruptors will create?

2. Foreseeing future users' behaviours

Past ——————————————→ Present

SHARED HISTORY   CARDS

Users behaviours

Trends

Effect on behaviours

1. How has the present behaviour changed in comparison with the past?
2. What were the past trends?
3. How have these trends affected users behaviours?

Future behaviours

How will the current trends affect users behaviours?

3. Uncovering value opportunities

Value opportunities ——————————————→ **Value propositions**

What would be an opportunity for creating value for users future behaviours in that future scenario?

Framework for systemic impact

STAGE	ACTIVITIES	TOOLS	REQUIREMENTS	EVIDENCE GENERATED
SUSTAINING Business ideation and testing	Collect insights on the business proposition from users and stakeholders with early prototyping. Collect needs of the community and the target audience by interacting with them with the prototype of the business proposition	Social Business Model Canvas Prototypes of the business proposition	Consider guidelines for social, environmental and economical sustainability in the ideation Uncover what is valuable for the user and the community and deliver that with the solution	Insights about how to reformulate the Business proposition to be successful and sustainable for the community
SUSTAINING Final business proposition	Develop the revised business model proposition Have a thoughtful plan on the economical, social and environmental sustainability of the business Create an implementation plan	Social Business Model Canvas Roadmap Implementation plan Organisation design	Innovative Business models that create "shared value" with their business proposition Consider the political, organizational and cultural implications of the business proposition Strong leadership, management and implementation skills	An implemented and sustainable business model
SCALING & SPREADING	Create ways for connecting with experts and facilitate a collaborative process to scale and spread the business Reassess the Business model to consider scaling activities such as licensing or franchising Spread the story Organise activities to transfer the practice Work for legislation changes	Collaboration tools Scaling plan Future vision Tools for communicating the story and knowledge generated (websites, online platforms, documentaries, etc.)	Involve interdisciplinary relevant stakeholders. Scaling is a collaborative process Consider guidelines for Universal or Inclusive design Evaluate the business proposition and strengthen it	Evaluations of the effect of the business in multiples sites
SYSTEMIC CHANGE	Understand interactions among different sectors Build and institutionalise partnerships and networks Create infrastructures for the new system Study behavioural change Grow self-organising social movements Implement legal and regulatory changes	Campaigns that create new evidence or practical examples Rewiring different sectors or economies Working prototypes/pilots of the new system Tools to empower the beneficiaries of the new system	Map potential unintended effects Transform some of the fundamental systems on which we depend Create a change of mindset in all the sectors of business, government, civil society and the household	Transformations in the ways we do things: changes in behaviours, habits, business models, policies, professional practises, laws, etc.

THE SOCIAL BUSINESS MODEL CANVAS

THE ACCELERATOR
FROM THE YOUNG FOUNDATION

Social venture:

IMPLEMENTATION

PARTNERS

Who helps you
to deliver your activities?

DELIVERY

What activities do
you do?

What resources do you own?

SOCIAL VALUE PROPOSITION

What difference are
you making?

What social impact measures do
you use?

CUSTOMER SEGMENTS

How do you work with people
who buy your product/service?

Who are the people that benefit?

MACRO ECONOMIC ENVIRONMENT

What are the economic,
social and technological changes
taking place that affect your market
now and in the future?

COMPETITORS

Who else plays in your space
Why are you different?

SALES + MARKETING

What is your sales and
marketing plan?

How do you reach your
customers?

FINANCE

COST OF DELIVERY

SURPLUS

Where do you intend to
reinvest this?

REVENUE

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