

Exploration of Digital Facilitation and Service Design of a Digital Learning Experience

- A case for The Index Project

MASTER'S THEIS | **SERVICE SYSTEMS DESIGN**

Aalborg University

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Digital Learning Experience - A case for The Index Project**

Abstract

This thesis investigates the fields of digital facilitation and remote collaboration in a case for The Index Project on how to create a digital learning experience, teaching Design Thinking to achieve Sustainable Change in companies.

The thesis uses Service Design methods to analyse tendencies within toolkits and digital learning journeys. The research identifies two main application areas of digital facilitation, one being for the purpose of knowledge transfer, and the other using it to explain methods and be process mediating. A common way to work with digital facilitation and remote collaboration can be to set up digital gatherings, encourage different formats of peer-to-peer feedback, or promote collaboration in the form community groups and forums linking people with similar interests to each other.

The research is investigating the expectations of the target users, finding that they expect high entry barriers for companies participating in such course, and sees community and peer-to-peer interactions as the most important to make a digital course fit to facilitate and motivate across differences in the businesses challenges and ambitions amongst the participants. The thesis concludes that digital facilitation can mean providing convenience for the process in the digital learning experience, but finds that it also seems to be important to be mediating meaningful human to human connection to motivate participants to engage.

The thesis ends up with a suggested solution to use their digital platform to provide facilitator training and inspiration for one local facilitator per company, rather than putting the resources and tools openly available for a whole team at a workplace. The user will be benefiting from choosing The Index Projects take on Design Thinking and Sustainability, as they will be empowered to lead their own team through training lessons, expert coaching, meanwhile gaining valuable network being paired with competent like-minded professionals in open groups. The thesis concludes the most important factor is that the user feels empowered and supported and sees this as crucial to make teams make use of the resources in their own company.

Key words: Service Design, Digital facilitation, Remote Collaboration, User Experience Design, Digital Learning Journeys and Toolkit Trends

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Introduction

Understanding the problem /

Case introduction

The Index Project Digital Facilitator

ABOUT THE INDEX PROJECT

The Index Project has since 2002 been working for the cause of Design To Improve Life. Their mission is “We need to redefine design from a commercially driven disciple to one that’s used to improve quality of life — for everyone.” (The Index Project, 2019)

This mission is emerging from the idea of making the field of design and innovation sustainable. That mission has later turned into a global movement, a biannual award celebrating sustainable innovation, but also more than anything a quest to work with education initiatives, teaching Design Thinking, and promote designing for sustainability to educators, entrepreneurs, startups and decision-makers.

This mission has up until now largely been carried out by in-person facilitation, but the time has come to make the nature of the education to the next level, and making it possible to scale up, by being made available in a new digital way, that would be enabling even more companies to integrate Sustainable Development Goals and implement new practices into their field of work.

PROBLEM STATEMENT

How might we...

Help The Index Project democratise their tools and resources, by utilising service design to craft a digital learning experience, explore remote facilitation, having a digital platform as the vehicle of change for sustainable business transformation?

Goals for the project

The Index Projects goal is to create a tool aimed for the target group of their sponsor, Industriens Fond, which is targeting small and medium-sized enterprises in Denmark.

The Digital design thinking course will therefore be targeted to professionals working in the small and medium-sized enterprises (SME’s) in Denmark.

They wish to better utilise their resources known as “The Design To Improve Life Compass”, and re-purpose the tools for a new target group moving forward and offer education in a broader meaning of the word. The goal of the project is to democratise and redefine their tried and testes methods and excersises within Design Thinking to be suitable for companies.

My goals

My focus as a Service System Designer will be to explore how to create a digital user journey for the course that could work as a remote facilitator, motivate users to endure the process and understand how to craft a meaningful digital user experience. The goal is to make a digital platform, as widely accessible as possible, so that more businesses will find value and call to action to work for Sustainable Change in their work context.

Project offspring – What purpose does the project serve?

We all live in a tumultuous uncertain time period, where we don’t know what to expect next. It’s a growing group of the population that has the concerns of how to contribute to sustainable development, as the urgency is rising and is affecting us all.

The project offerings from a hypothesis that is that there is already a pool of great tools and methods on sustainability and Design Thinking, that is already living online and being broadly available, as well as there are a whole lot of “woke” individuals working for companies across all industries, that is urging to be a part of the sustainable mission. However, there seems to be an opening in the market for packag-

ing these methods and offer to be a part of an inspiring community, that could serve as the missing piece of making the companies actually do the work needed to change their ways. Barriers related to a shared mindset and here and now incentive to be working with SDG’s at company level, is one of the barriers we believe is holding the companies back, so the motivation is to explore how Index can use digital facilitation to get the teams to land on the same mindset and start acting. By utilising The Index Project expertise in Sustainability, Workshop Facilitation and Design Thinking, as well as keeping an ongoing dialogue and providing mentorship for sustainable companies globally, can be what needs to be further accessible. The overarching goal is therefore to create a course inspiring to action-mindedness where there is a mindset shift from passiveness, leaving starting sustainable initiatives to someone else “further up in the system”, to enable a feeling of governance and empowerment.

Information about the platform

The Index Project platform is currently a website primarily serving as the home of the award winners and inspirational information and stories about sustainable innovation. Their platform also serves as

a learning hub, where one can go to access reports and resources created by the organisation, and a place to get in touch with The Index Project to get sparring, and collaboration on topic regarding sustainability and innovation.

Market studies

Competitors for this sort of open toolbox within most proximity to the ambitions of the Index Project would be similar offerings from organisations like IDEO, IBM, Hyper Island.

– IDEO provides IDEO U, Open IDEO, The Circular Design Guide.

– IBM provides Enterprise Design Thinking.

– Hyper Island providing HI Toolbox and The Progress Index.

Other parties involved:

The stakeholders of the project apart from The Index Project team, is the creative studio Trouble, where I had a position as a student UX and Service Designer. Trouble was initially responsible for the exploration and first iteration of a possible scope of work, as well as industry experts in digital products and the trends within this domain, and finally the The Danish Industry Foundation (Industriens Fond), who has provided the funding for the development of the new digital toolbox.

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Academic motivation for the master thesis

Studying and working in the field of Service Systems Design, one's skills can be applied to a broad range of problems, where one's competencies can be used to work on challenges emerging in many fields.

The theme for the thesis is investigating user experience in two fields currently being explored and redefined; Digital Facilitation and Digital Learning Experiences.

Making digital platform is a medium for igniting sustainable action mindedness, is a project that requires a deep understanding for the end-users motivation and needs while undergoing a digital learning journey.

The duality of the two, remote facilitation and digitalisation of learning experiences, is important in the global society throughout and impacts every enterprise. These are factors all companies will have to consider. Moving forward, companies will possibly have to reorganise to match internal aspirations, as well as the external expectations of the company. The challenge seemed relevant as it is one that needs to solve technical challenges for the company, considering the user experience design. A digital platform is a medium and the project requires a deep understanding for the end-users motivation and needs in undergoing a digital learning journey.

This project is chosen with a wish to enable an organisation, whose mission is to work with "Design to improve life", teaching companies how to incorporate sustainability in their field of work, made this a challenge that resonates deeply with my aspirations as a service designer. Being a service design student, empathy and curiosity are the pillars for understanding deep human needs, as well as the value in concrete problem solving, focusing on efficiency and ease of use working with technological solutions.

Learning objectives

Based on the following objectives and learning goals as described in the Curriculum for the Master's Programme in Service Systems Design (Aalborg University, 2017) the students must be capable of:

Knowledge

- *Must have knowledge about the possibilities to apply appropriate methodological approaches to specific study areas.*
- *Must have knowledge about design theories and methods that focus on the design of advanced and complex product-service systems.*

Skills

- *Must be able to work independently, to identify major problem areas (analysis) and adequately address problems and opportunities (synthesis)*
- *Must demonstrate the capability of analyzing, designing and representing innovative solutions*
- *Must demonstrate the ability to evaluate and address (synthesis) major organizational and business issues emerging in the design of a product-service system*

Competences

- *Must be able to master design and development work in situations that are complex, unpredictable and require new solutions (synthesis)*
- *Must be able to independently initiate and implement discipline-specific and interdisciplinary cooperation and assume professional responsibility (synthesis)*
- *Must have the capability to independently take responsibility for own professional development and specialization (synthesis)*

Personal learning objectives

In addition to these learning objectives, the personal gains and goals and objectives for the work with the thesis are:

- *Scope a complex service design challenge, and explore multiple themes and concrete challenges, working on the problem with an academic approach, as well as working on the case with a practitioners toolkit to solve the problem.*
- *Project manage and conduct a Service Design project from start to end, and setting the direction from a Service Design angel to a challenge originally defined by an external client, gathering and filtering existing data and research, synthesise and collaborate with external stakeholders as needed.*
- *Explore how to work with multiple stakeholders, working with alignment and involvement of a wide range of interests, spanning from clients, co-workers and potential users, spanning from fellow designers to complete "non-experts".*

Area of investigation / Literature review

Keywords: Service Design, Digital Facilitation, User Experience Design, Behavioural Science, Remote collaboration, Sustainable Business Transformation

Service System Design

Service design is an ever-evolving discipline, using tools and methods always putting the user at the centre striving to solve their needs, merging interaction design, ethnography and cultural studies, with methods known from all other design disciplines and system design. (Curedale, 2018)

It requires skills to uncover unmet needs and create complex systems and design experiences that will span across physical, digital, can be not tangible and service will inevitably be changing over time, therefore, Service Design is free from a single clear definition. However, many have an angle to describe the discipline.

The workbook "This is Service Design Thinking" (Stickdorn et al., 2018), that was created by crowd sourcing knowledge from Service Design practitioners worldwide while attempting to collect definitions and most commonly used practices. One of the definitions from the book cites Simon Clatworthy (2011), who says that service desirability is made up of the three basic elements: usability, pleasurable and utility. These factors are what in sum will determine how the consumer will evaluate their experience in meeting with the service encounter. (Stickdorn et al., 2018)

UK design council describes the discipline in a "Service Design is all about making the service you deliver useful, usable, efficient, effective and desirable." (UK Design Council et al., 2011)

They define the role of the service designer to be the orchestrator describing how the service will unfold over time. The service is made of

touchpoints and time, and the craft is creating these touchpoints and defining how they will interact with each other and the user.

The design of a service experience contains deliberate choices regarding products, services, spaces, and technology. Service Designers have various methods to utilise the empathy they have gained from research and plan out experiences that need to stretch over time and space. We look for ways we can try to predict and plan for user journeys by narrating them, using methods like storyboarding, role-playing and scenarios to visualize and unfold ideas.

The discipline of Service Design is borrowing terminology and methods from the field of performing arts, orchestrating touchpoints, exploring detailed overview of front stage interaction, the backstage- and ultimately back-end interactions, working with holistic system design. (Stickdorn & Schneider, 2011) Instead of firmly defining what Service Design is, Marc Stickdorn (2011) came up with guiding principles for his book "This is Service Design Thinking", that being a compass for thinking and working with service design. It should be User-Centred, as in experiences from the customer's eyes. Co-Creative, as in involving and mindful of all stakeholders. Sequencing, as in visualised as a sequence of actions in a certain period of time. Evidencing, as in visualized in physical artefacts. Holistic, always regarding the greater environment of the service. (Stickdorn & Schneider, 2011)

User Experience Design and Touchpoint orchestration

One of the frequently used definitions of Service Design, found on Service Design Org, is that service design is "Design for experiences that happen over time and across different touchpoints" (Clathworthy, 2011).

The discipline of service design requires the ability to keep the overview of a service encounter throughout, and to view the user journey as something that will happen at multiple touchpoints. This leads to one of the pillar disciplines in Service Design, and a skill one must have as a Service Designer; "Touchpoint orchestration". One way to ensure solving the problem while considering how the Service Should be delivered, while seeing it with all lenses, is by using the AT-ONE method, providing touchpoint workshop themes, standing for:

"AT-ONE: - A - New combinations of ACTORS who together can provide improved services. - T - Orchestration and development of TOUCHPOINTS to provide innovative services. - O - Developing new OFFERINGS that are aligned to brand strategy. - N - Understanding customer NEEDS and how new services can satisfy them. - E - Designing customer EXPERIENCES that impress the customer (Clathworthy, 2011)".

This toolkit is developed to meet the need to be actively using design of touchpoints, as Clathworthy says; "Each time a person related to, or interacts with, a touchpoint, they have a service encounter. This experience and adds something to the person's relationship with the service and the service provider. The sum of all experiences from touchpoint interactions colours their opinion of the service." (Clathworthy, 2011)

The toolkit is a response to be a structured way of mediating between stakeholders and diverse teams, where we are often bringing together groups of people with different points of view

into the process, as Calthwothy points out, "Challenges facing cross-functional teams include the development of team collaboration, internal culture and team communication, as well as the achievement of a common understanding and shared vision of the object of development." (Clathworthy, 2011)

He says the AT-ONE workshops can help create a common understanding and help with team building, that it can be a tool for the process of analysis and mapping, as well as help teams in idea generation.

Mapping interactions and services

One of the cornerstones in service design, is to be able to unveil complex operation across time and map out all actions required from the user's journey perspective, in the service delivery front-stage, backstage as well as with any supporting actors. This is typically drawn out in a Service Blueprint, also known in other common variations as Experience Map or a System map. (Stickdorn & Schneider, 2011) depending if the system overview or user emotions are the main focus for the communication.

IDEO defines The Experience Blueprint to be is created as an attempt to choreograph the details of the human interaction, and guide how people should travel through the experience. It's also said that the blueprint should be a high-level strategy, but also provide fine-grained analysis of the details at the critical moments: "Every moment has the potential to sour the relationship but only a few offers possibilities for an experience that is distinctive, emotionally gratifying, and memorable." (Brown & Katz, 2009)

Choice architecture – Theory of behaviour science

Investigating motivation and how to influence the human behaviour through design, one angle can be found in the book, *This is Service Design Thinking*, and the chapter “Deep Service Design Thinking– Integrating Service Design Thinking and Motivational Psychology,” by Fergus Bisset, (2011) where Bisset suggests that Service Designers can benefit from using the psychological literature while approaching complex human behaviour, social and ecological design problems.

The chapter suggests how motivation can be helpful while planning for service design journey mapping and journey visualisations. Bisset writes, “It will raise the view that visualising and codifying motivation with existing and established service design tools, methods and processes gives us as “service design thinkers” the opportunity to better understand, and more sustainably “energise and direct” human behaviour. It proposes that this will help service design thinkers develop and evolve even more innovative, democratic and empowering solutions to even more “complex behaviour, social and ecological problems.” p.302 (Bisset, Stickdorn, Schneider, et.al. 2011)

He argues that adding the layer of motivation to the journey mapping, as he calls “engagement mapping”, and this will help service designers while trying to anticipate how and when motivating and demotivating events will occur within a service encounter, and also how they will impact on the overall user-service experience.

Another way of viewing the process of designing new services is to view it as working as “Choice Architects.” Service designers are part of organising contexts where people will have to make decisions, this is what Thaler refers to as being a Choice Architect, according to the book *Nudge* by (Thaler & Sunstein, 2009), had the meaning being someone responsible for organising the context in which people make decisions.

They claim there is no such thing as neutral design. As we make use of nudging, there will be a condition that the choice architect will be in charge of influencing people’s behaviour for what they mean is the best. There will be a need for nudging, and facilitation, following the theme of motivating companies to make changes to sustainable business. There are several universal biases to be aware of that can make these processes of user motivation while interacting with the service difficult.

Crafting Desirable Interaction Design

Digital services are highly dependent on well designed interactions. According to Simon Clathworthy chapter on “Services as Interactions”, he is arguing that Interaction Design is a discipline striving for highest possible desirability as this can help services connect with the users on an emotional dimension. (Stickdorn & Schneider, 2011)

Carefully considered interaction design in the user journey, can be a way to ensure the service is designed for highest desirability with the lenses of utility, usability, and pleasurability. (Stickdorn & Schneider, 2011) Utility, is providing the functional benefits and what the service does, while the usability is how the offering is delivered, while pleasurability is about what about the offering that makes the service feel good to us. Building a new service system and user experience, one of the methods and theories within how to create powerful digital products and successful interaction design, as it offers a structured model to consider all these aspects, is by using the “Hooked Model” Nir Eyal.

Utilizing the principles of the “Hooked Model” by Nir Eyal, (2014) we need to look at designing a user experience for highest possible desirability with the scopes of what “Trigger”, “Action”, “Viable reward” and “Investment”, that makes the foundation of use, frequency and ultimately will sum up how the users are experiencing the service.

Working with online tools, remote collaboration and digital facilitation

There is a wide variety of specialised digital tools attempting to efficiently enable digital facilitation and remote collaboration. However, this field has been actualised more than one could ever have imagined, due to the global situation, forcing the whole world to adapt to more remote collaboration with digital means, as this has been highly actualised by the current event of COVID-19, where the whole world was looking how to reorganize to continue being productive, learning, working and collaborating while working from different locations.

Remote collaboration and facilitation tools have been a challenge that has been attempted to be solved by many. Digital norms and formats are evolving becoming more sophisticated, as well as the emerging technology trends and interaction norms we accept are always developing. As Tim Brown describes accurately around this topic and the challenges in his famous work-book on *Design Thinking*, “Change by Design”, (2009)

“Much effort has gone into the problem of remote collaboration... Only recently has it begun to show signs of taking hold as an effective medium of remote collaboration The internet helps move information around but has done little to bring people together. So far, efforts to innovate around the topic of remote groups have suffered from a lack of understanding about what motivates creative teams and supports group collaboration. Too much has been focused on mechanical tasks such as storing and sharing data or running a structured meeting but not enough on the far messier parts of generating ideas and building consensus around them” (Brown & Katz, 2009)

Even being more than ten years since this quote was written, there to this day maybe not even been invented a tool that makes most of us prefer it to a physical meeting and in-per-

son facilitation of processes, yet other circumstances such as the latest condition such as the sudden need for social distancing, or range of more slowly emerged considerations, such as regards to a more sustainable way of interacting, for example being cutting unnecessary travelling, or simply the fact that we are more than ever are living in an interconnected global age, where we can connect with people with shared interests and values across boundaries, and all of these reasons can be some of the drivers of the rapid acceptance and integration into making use of more digital tools and technology that can help us connect and collaborate, and might be a few of the reasons for making us open to see the benefits of this way of working together.

Sustainability and changed premises for doing business

Sustainability can be defined in many ways and interpreted differently but a unifying definition is the United Nations 17 Sustainable Development Goals, commonly known as the SDG’s, that are defined to be, “The Sustainable Development Goals are the blueprint to achieve a better and more sustainable future for all. They address the global challenges we face, including those related to poverty, inequality, climate change, environmental degradation, peace and justice. The 17 Goals are all interconnected, and in order to leave no one behind, it is important that we achieve them all by 2030. (UN, 2020)

Businesses are pushed to take action and are impacted by this agreement both directly and indirectly. One of the ways is how laws and restrictions are set in place to lead the process of more sustainably, and another is the increasing consumer demand, that businesses are taking a stand and showing real efforts on sustainability in their operations. There is said to see that the real shift in the economy is occurring in 2020. As referred to by The New York Times in The Daily podcast episode (The Daily et al., n.d.) is evolving around how the most influen-

tial prediction of the economic situation, Larry Fink, who is the CEO of BlackRock, which is the largest money manager in the world that manage \$7 trillion. His message is expected to create serious ring effects, as it effectively threatens to remove money from the big corporations does not comply.

His yearly message is clear, here quoting Fink's letter: "Climate change has become a defining factor in a company's long-term prospects. Last September, when millions of people took to the streets to demand action on climate change, many of them emphasized the significant and lasting impact that it will have on economic growth and prosperity, a risk that markets to date have been slower to reflect. But awareness is rapidly changing, and I believe we're on the edge of a fundamental reshaping of finance. We will be increasingly disposed to vote against management and board directors when companies are not making sufficient progress on sustainability-related disclosures and the business practices and plans underlying them." (The Daily et al., 2020.)

System shifts and Sustainability

Having businesses find the spark and initiative to make a difference can be a challenge, as it is becoming harder to get access to people's consciousness at a meaningful level, as we all have endless messages and information sources, and more consciousness about how everything we interact with has an agenda to be pushing and therefore is so used to filtering out the endless messages of suggestions on what to be doing and how to be living.

The world is at a state of information overflow, where so many messages are presented each moment of each day that the chance of it penetrating our consciousness and truly spark our compassion, action-mindedness and create an impact, is ultimately very low.

Timothy Morton is addressing the fatigue and resistance people might experience if they get

facts and information dumped on them. In his recent book, the philosopher and professor's book on, "Being Ecological" (2018), is examining ecology in terms of ecosystems and coexisting on earth. Morton's is explaining the complexity of our situation as people living in these tumultuous times of climate crisis and our previous working systems at the verge of a breakdown. He argues that rather than overflowing people with facts, that he calls "Information Dumping", we need to approach problems of our time differently to inspire impactful actions.

"Every day, as I've been arguing, we get bombarded by ecological factoids, and ecological issues that are truly urgent, and if you think about them too hard, you can become really depressed and end up in the foetal position, or simply curled up in denial like a hedgehog ... Numbness is a way of protecting you from shock." p. 33. (Morton, 2018)

In the book from 2015, "How To Thrive In The Next Economy" (2015), John Thackara, who has spent his life writing books on what a sustainable future would look like, is addressing what happens to humans when exposed to some of the conventional environmental communication. He reasons that, "Much of this creative work is impressive, even striking - but an unrelenting flow of gloomy news, on its own, had proven at best ineffective, at worst, counterproductive. "Doomer porn", as some call it, stubbornly resist empathy. It produces guilt and denial rather than transformational change." p 160. (Thackara, 2015)

His analysis resonates that this phenomenon, where the stream of devastating data and unsettling stream of news about how the world is about to end without can be numbing. The "Doomer Porn" Thackara is addressing goes hand in hand, with the issues relating "Information dumping", Morton is addressing.

"Several thousand years from now, nothing about you as an individual will matter. But what you did will have huge consequences. This is the paradox of the ecological age" p.35 (Morton, 2018)

Morton frames the constant dilemma of how to make the right decision we all as individuals, nations but also globally are facing living in the 21st century where the future is uncertain, and changes are happening rapidly. We have a lot of knowledge, facts and evidence and all live with the consequences of climate change and our unsustainable, unjust ways of living already. There is a need to hold a lot of ambiguity and we need to take multiple perspectives to weight our actions on earth. However, it's a big hurdle to change our ways.

One of the big trends Thackara identifies in environmental communication is, however, the overly positive stories about us as individuals role in changing the problems we are facing, and how to take small everyday steps to overcome the climate crisis, but he argues that this will have little effect in terms of changing the broken systems at a whole. "However positive and uplifting stories may be, they leave untouched the underlying narrative that we as a society can have our cake and eat it too - here cake means perceptual growth economically." p. 161 (Thackara, 2015)

Methodology

Creative Problem Solving

A service designer is always working to solve some kind of problem related to an unmet need the user or the organization has. The problems are often complex and require several perspectives in order to create a solution. When attempting to be designing for a complex problem regarding sustainability, defining societal or sustainability problem as "Issues around health, food, energy, transport, climate change and security are interlinking and systemic in terms of their reach and impacts." (Wittmayer et al., 2013)

This sort of problem area is often one that can be categorized as a "wicked problem." This means a problem that is changing in nature and holds contradictory and has no single solution to them. In these cases we need to produce a broad spectrum of solutions, and sometimes accept that the solution is just one way, and not the way, to approach a solution to the problem.

The skill of creative problem solving is important to service designers. To be successfully using creative thinking, it requires the ability to change perspective and keep on changing perspective. (De Bono, 2018) In De Bono's Thinking Course by Edward De Bono, he says that the creative thinking and problem solving, is aiming to take away the judgment, as an idea we do not like or resonate with, will never be labelled creative, but this is an unloaded term of seeing a problem from many perspectives in order to challenge the conformist way that binds those aware of the "rules".

He promotes that if we have as many possibilities as possible that we will be closer to avoid errors related to our own perspective, we need to use the thinking tool he called the APC (De Bono, 2018), which stands for mapping all Alternatives, Possibilities, and Choices. This is a tool to open up new angles to look at an hypothesis. Many times when we have difficulties in making decisions it can stem from a failure to produce sufficient alternatives.

A well-known style of approaching Service design is by using “Abductive logic”, that is the logic of what might be. The use of abductive reasoning will be starting with an incomplete set of observations, and proceed to the likeliest possible explanation, as a way to explore if it could be true. (Curedale, 2018) This is a powerful thinking style, as it allows for ambiguity and changing situations, by testing hypothesis by building prototypes and testing them, in order to improve a design. Service Design is often about forecasting and designing services and solutions that should cater to what will happen in the unknown future. The way we do forecasting is to analyse the current trends in order to make a prediction about what might happen. This is also a discipline that requires us to use service design methods to generate deliberate alternative futures to enrich our own perception. Here we can make scenarios, and use the APC thinking tool (De Bono, 2018) to open our scope.

Design Thinking – Convergent and Divergent thinking

Design thinking is an actual method, unlike the other thinking styles, but a structured and formalised set of tools and methods for practical, creative problem-solving. (Curedale, 2018) Working with service innovation, one of the biggest challenges and risks, is to end up on a solution we already can imagine, rather than identifying the deeper need based on analysing

behaviours, and provide what is really needed. (Bjørner, 2015) The process of Design Thinking is making use of both divergent and convergent thinking, making it an iterative design process.

Divergent thinking is used in the phases of exploration and judge-free idea generation. The goal is to expand and have as many options as possible, and imagine possibilities, build new ideas and try out different perspectives. The divergent phases of a design process ensure we stay open and generate loads of options and hinders the design team to take decisions too early. This way the framework helps keep options wide and let new options emerge. The narrowing and elimination and decision making take place in a timely manner. Convergent thinking is where the decisions are being made, and we close down and cluster and try to sharply scope, select and define what to be going forward with. It’s where decisions are made and we define hierarchies, and test and refine.

This is a commonly used method in the design industry as it is setup to avoid bias and the fallacies that might happen if we make too fast assumptions. “Group thinking tends to converge into a single outcome. Convergent thinking is a practical way to decide among existing alternatives. What convergent thinking is not good at, however, is probing the future and creating new possibilities.” (Brown & Katz, 2009) Its is very important to have both styles in a project as we otherwise could miss valuable innovation opportunities.

While attempting to be creative problem-solving, Service Design discipline offers a set of tools and conventional methods used as a gate going into what IDEO refers to as “the space of innovation” where we are working with a method leading us through Inspiration, ideation, and implementation. In the book “Change by design” – Tim Brown, IDEO methodology (Brown & Katz, 2009) they argue that design is too important

to be left to the designers, and therefore any impactful project should be involving the decision-makers as well as the users. They argue that the best ideas emerge once the whole ecosystem is represented.

The Empathy phase, where we conduct research of all sorts, will have to be transformed from static field notes and photographs, into connection with the people we are observing at a fundamental level. “The mission of design thinking is to translate observations into insights and insights into products and services that will improve lives”. p.49 (Brown & Katz, 2009)

The Synthesis phase is where all the pieces of information are put together to create whole ideas and concepts. This phase will be dedicated to organizing the data, identifying patterns, interpreting and meaning condensing in order to end up with a base that can be leading up to the next phase of making decisions. There needs to be narratives and storytelling to make the data accessible.

Participatory design

Using Design Thinking as a starting point is with the intended end user that will benefit from the innovation. The research is based on observations and analysing of behaviours in order to map pain points, regarding both functional and emotional evaluation, in order to go on to identify the most critical problems. The problems are then reframed and used as an inspiration to be identifying opportunities spaces.

The rise of the use of the “wisdom of the crowds” has inspired the designer to be involving people in a more nuanced manner, and designing with people, rather than for them. The designer’s role is to be a facilitator and synthesizer, not an inventor.

“To achieve that goal, participatory design emphasizes co-research and co-design: researcher-designers must come to conclusions in conjunction with users. So participatory design involves redesigning workplaces and work organization as well as work tools. And it is iterative, allowing workers and researchers to critically examine the impacts of these incremental redesigns in progress” (Spinuzzi, 2005)

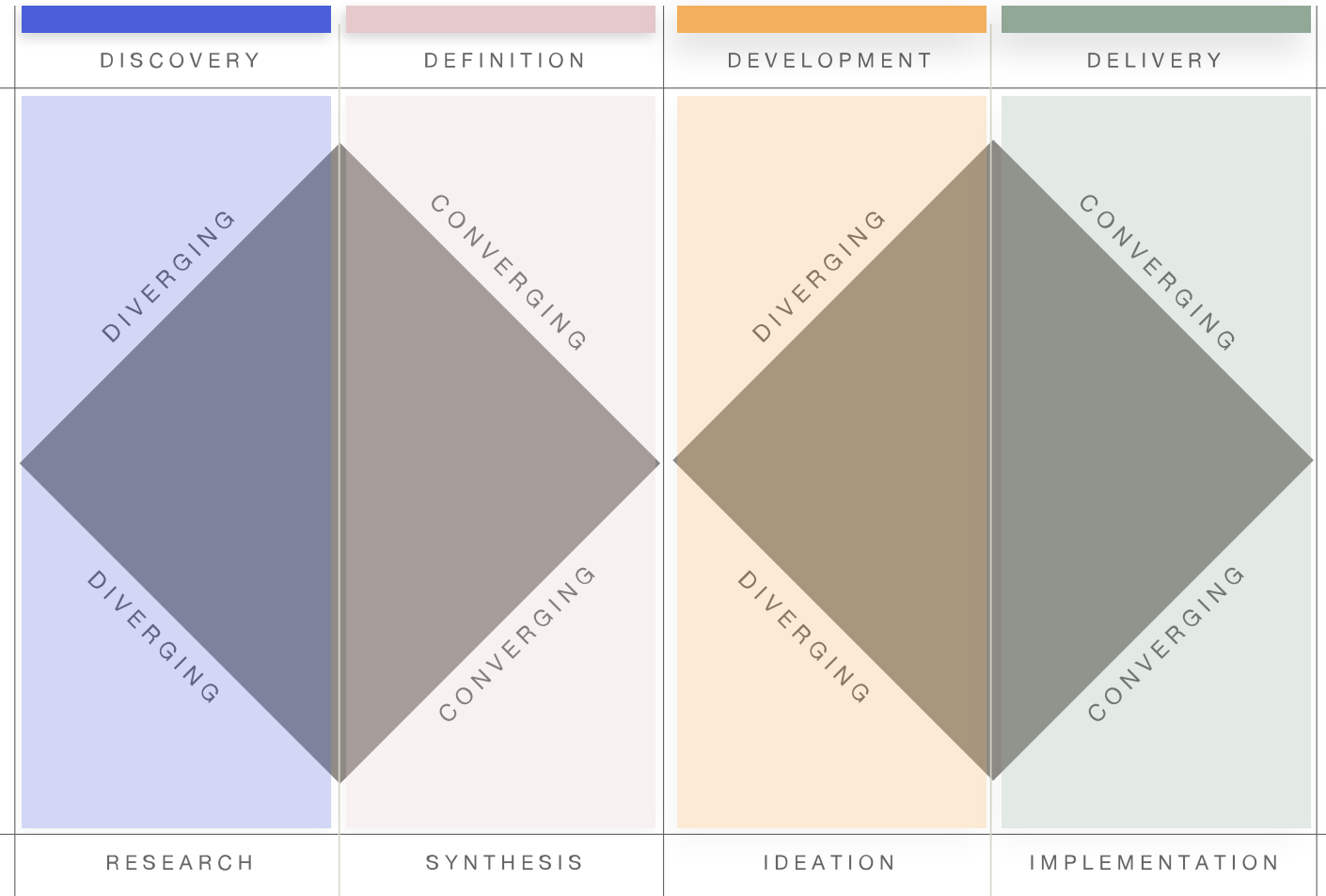
Participatory design can be useful at several stages of the Design process. The client and stakeholders should be actively contributing. In the Initial exploration, the users can participate with interviews, observations and the observation of artefacts. In the stages of Discovery, they can contribute by clarifying the goals and values, through workshops and interviews. Finally at the stage of prototyping solutions, they can help test and come along in the design phase. (Spinuzzi, 2005)

Process and theory selection

What is the Double Diamond?

To plan what tasks should be done, and in what order, I will structure the process with the Double Diamond. The UK Design Council is behind the “Double Diamond Model” (2004) that is used to structure design methodology.

The model is used to visualise the content of a design project and method both gives a visual process design as well as being a project management tool. (UK Design Council, 2015) The model is divided into four phases using loops of “Convergent” and “Divergent” thinking opening up, and narrowing down again in four phases.



DISCOVER

The first phase “Discover”, a design team is working to explore the problem space and build knowledge through rich and broad research. The beginning of the project should be spent reviewing the material, conducting analysis and exploring the subject. This can be stakeholder interviews, analysis of competition and target groups and summarising the perspectives to solve an assignment.

UNDERSTANDING THE BRAND AND GOALS

Stakeholder interviews and alignment meetings
Content audit

The context analysis of the target group is based on the data collected in this big screening report conducted by Index Project, “Mapping sustainability & SDG work in Danish companies.” (2019) The report explores how Danish companies are incorporating the UN’s 17 sustainable development goals (SDG’s) released in 2015. The mapping process involved a screening of 362 Danish companies, followed up by 18 in-depth interviews with companies selected from the 300+ group. (Index Project, 2019) The screening was conducted across industry groups and was selected across all regions in Denmark based on a network based selection, from micro to large corporations, where the number of employees spans from Micro, 0-9; small 10-49; Medium 50-249; Big 250-10.000 (Danmarks statistik, 2020).

UNDERSTANDING THE USERS

Context analysis and data narration - The nine dimension framework

The Nine Dimension Framework is based on the ethnographic method created by J.P.Spardley (1980) and is originally from his book “Recording Ethnographic Observations” (Spardley, 1980). The Nine Dimension Framework is a tool to describe the realities of the target group, and explore the background of; the project, the sit-

uation, the location, the time, the social and the technical context. This is one of a number of ethnographic frameworks that have been developed to give structure to observations and to ensure that the researcher does not exclude important data. The Nine Dimension Framework is used in this context to collect main insights from the screening and interviews in the report Mapping Sustainability & SDG’s in Danish Companies. (Index Project, 2019)

Participatory Design Workshop

Exploring “Tangible sustainability in everyday life of businesses”, at Index Conference Track (2019) we had created a set of exercises that resembled roleplay where the teams were working with fictive business cases, and using their experience to identify what might be blocking sustainable change from happening. The exercises were created with the aim of identifying mindset barriers standing the way of sustainable shifts in companies across industries. The participants were asked to come up with ideas for solutions, making it a participatory design workshop. (Spinuzzi, 2005) The workshop was conducted putting together four diverse teams, with the approximately 30 participants from various backgrounds and origins all attending the Index conference.

Unmet Needs Analysis

The Unmet Needs (100 Open Toolkit, 2019) are used to sharply formulate what the root and cause of the problems are, and what is holding people back from overcoming them. The tool is inspired by work from economist Theodore Levitt, and his famous notion from that “People don’t want quarter-inch drills. They want quarter-inch holes.” (1983) Meaning we have to understand the “Unmet needs”, in order to come up with innovative ideas. The framework of the unmet needs is described based on a workshop with Simone S. Jacobsen, Research & Develop-

ment Director at The Index Project.

Defining Workplace Personas

Using Personas can enable communication and common understanding of the target group, for whom we are designing for. The Persona tool is not describing actual people, but synthesised directly from observations of real people (Cooper, 1998). The personas are created in order to describe a group of workplaces with similar interests, challenges and characteristics, and will try to condense the research insights gathered so far as well as imagine an even richer picture of how the Index Scenarios are present in realities of the target group. (Stickdorn & Schneider, 2011)

UNDERSTANDING THE BUSINESS

Competitor audit & Benchmarking analysis

The audit of the competition and inspiration is done to get an overview of how others solve a similar problem as the platform wants to serve. This audit method of trying a variety of similar Services in the same market, can resemble a Service Safari, (Design Council, 2015) where there is an open exploration trying to understand what makes a good service. This insights were compared by doing a Benchmarking analysis is based on a Audit Framework from Marco Spies book, Branded Interactions, and is used in order to compare the other platforms to each other in a structured way. (Spies, 2015) This analysis is to know how others have solved a similar problem, and can help in the design process if we attempt to solve it even better. Looking at the webpages, it can be a good idea to focus on features, ease of use, and their technical excellence, and the rating is used to have a comparable matrix of how to sum up what works better.

DEFINE

The “Define” phase is where the knowledge is synthesised and the team will end up with a clear problem formulation and brief to work on further, once the problem is illuminated from every angle and clearly broken down and it will now be possible to understand the actionable tasks. The Define phase ends with a fundamental challenge and problem to try to solve and a strategic direction.

SYNTHESISING

Refarming the challenge

The method for the “Challenge Reframing”, was inspired by the Design Challenge Scoping Guide by d.School. (2018) The reframed scope of work are structured by help from five questions to frame a design challenge (Hasso Platter Institute of Design at Standford, 2018). This is a tool aimed to help create an actionable direction for further work, while broadening the solution space.

The template is telling you to fill out sub questions under the headlines of What, For Whom, Context, Goals and The Crux.

The questions makes you describe the human actions and experiences. Describing for whom, that will embed the target group, while considering other stakeholders to be aware of. Then goes on to the context, asking you to reflect on “In the world where... ” or “Keeping in mind...”, what making you aware of the context for the project and bringing to play the findings. The goals are filled out with a “We aim to...”, is setting spotlight on the desired outcome, and finally The Crux is describing what we really need to figure out. This should be a question or assumption. (Hasso Platter Insitute of Design at Standford, 2018)

DEFINING STRATEGIC DIRECTION

Defining the Design Requirements

In order to sum up on requirements and expectations from the Index Project team, all findings and communication with the stakeholders is summed up in a set of direction giving principles. The requirements are based on the interviews and workshops discovered in the stakeholder interviews. (appendix) The frameworks is inspired by and freely interpreted based on the template “Design Scope: Design Requirements” by Service Design Toolkit. (Service Design Toolkit, 2011) The tool is capturing the most critical service requirements based on describing the service through answering sub questions to the easy sentence; “Who Does What?”.

Exploring best practice of Design Requirements

Exploring the Guiding Principles trough good practice examples trending within User Experience Design. After deciding on the further direction, the statements were examined by exploring each of the Guiding Principles by looking for good practice examples within User Experience Design. This was to relate to how the concepts can take form in digital product design.

DEVELOP

In the “Develop” phase, the team is once again opening up and exploring various solutions and working iteratively to test and explore ways of solving the problem. The concept is developed, and ideas are multiple. Here the components are created and get ready to be tested in order to to be refined and iterated on.

DEVELOPING THE USER EXPERIENCE

Leveraging Behavioural Science

Utilizing the principles of the “Hooked Model” by Nir Eyal, (2014) we need to look at designing a user experience for highest possible desira-

bility with the scopes of what “Trigger”, “Action”, “Viable reward” and “Investment”, that makes the foundation of use, frequency and ultimately will sum up how the users are experiencing the service.

Bias analysis and opportunity spotting

Based on the research found in the book, “Nudge - Improving Decisions About Health, Wealth and Happiness”, by Richard H Thaler and Cass R Sunstein, (2009) they collected studies and research of biases and mechanisms affecting our behaviour. The analysis is looking at a selection of them, and reflecting on how they can impact users considerations, and hereby how we interact with services and products.

IDEATION

Idea generation / Lotus Blossom- “What if”

The method is used freely based on The Service Design toolkit, (Service Design Toolkit, 2011) and evolving around the design requirements. The guiding principles were centre for each blossom, making it an exercise with six sessions of ideation. The initial requirements are then moved out to a cluster of their own, and here it is added eighth ideas per requirement. This is a way to rapidly generate a lot of ideas. With the six official requirements making the basis of one new “Idea Blossom”, that allowed that within one working day, that 48 ideas were effectively generated. The “What if” method (De Bono, 2018) can typically be used when looking for an efficient way to view a matter in a different light and help formulate an idea or concept clearly.

Idea prioritization & idea testing workshops

Card Sorting / Initial getting to know the participant and their workplace

As a warm-up exercise getting to know each other, the beginning of the workshop started with a “About your company” Card Sorting, (Curedale, 2018) as a starting point to talk about their business, and for the facilitator to get a better picture of their setting. The representative from the company was asked to drag and drop the most covering options regarding how

many worked there, how the team would typically interact, and in case of them undergoing a process of business transformation, whom at the workplace would be able to take initiative to do so. The participants were then asked to select who they would envision being the right team to be involved in such a process and how they would prefer to collaborate in a workshop. This created a baseline understanding of how the context would be at their workplace. Also helped the company get into the state of mind that they were about to go into a 12 step learning journey, that they had yet to learn the details about.

Possible Pain Point scenarios

The scenarios was inspired by the technique of Guided Storytelling, (Alsted & Bjørner, 2015) where the participant is invited to walk us through a scenario of a possible pain point, and then asked to describe experiences and thoughts around the topic. The session started with a scenario, that was formulated as a statement describing a significant possible pain-point, that could be a barrier for completing such a process as the Index digital facilitator.

The text was written as a small story and read out loud for the participant, as well as giving some more details around the guiding principles for the service we are building and giving a more elaborate context explaining the hypothesis. The two hypotheses were based on the synthesized data so far identified and pointed towards. The participant was a part of this deductive analysis, telling us if and how they resonated with the hypothetical scenario in their work-life setting. As an iteration from the first workshop, the second participant was also given three blank post-its and asked to give three top of mind solutions on how to resolve such an issue.

The second part of this exercise was a form of idea sorting, using an Evaluation Matrix to assess the viability of each idea presented to the participant. The Evaluation Matrix is known from Lean UX practices, and was inspired by the exercise called Prioritization Grid used in the IBM Enterprise Design Thinking. (Johnson,

2016). The method is useful when we need to weigh different ideas up against each other, and the measures used were Importance and Feasibility.

The next step of this exercise was then to explain a selection of the ideas generated as the outcome of The Lotus Blossom exercise resulting in 48 ideas evolving from the Guiding Principles. After hearing about each idea, the participant was then asked to sort the ideas by dragging into the matrix, with one matrix measuring Feasibility, and the other matrix measuring Importance. The participant was then asked to place all the ideas where they saw them fit. This exercise was done in order to determine the developing direction of the concept, see patterns and hear the reflections on each concept and how they would see the ideas benefits and limitations in a workplace like theirs.

Feedback Grid

The session ended up with a feedback grid, to get a sum up impression of how the participant thought the idea prioritization went, and allow a moment to capture any other remarks that we did not directly ask about during the workshop tasks. The method is a matrix with the quadrants "Worked well", "Needs to change", "Unanswered questions", "New Ideas To Try". (Feedback Grid Toolkit Activity - Enterprise Design Thinking, n.d.

ITERATION

Idea filtering - Point of View framing

Point of View : Idea filtering and the POV method

After sorting ideas and revisiting and analysing the results, we got a broader view on how and what such course had to be in order to have an impact and be usable for the Danish SME's. In the process of dividing all the already existing ideas, new clusters appeared and ideas were continuously developed and further interpreted to fit to the context of the companies. To merge and condense all the findings in the idea prioritisation sessions, the following exercise is a called POV, standing for Point Of View. (d.school at Stanford University et al., 2018) The aim is

to condense and explain as short and precise so that a stranger could comprehend the data instinctively. It helps make the data actionable, and promotes finding words to explain the challenge short and meaningfully, and a way to frame the opportunities we have discovered.

CONCEPT DEVELOPMENT

Crafting a future state User Journey

Building a User Journey, helped concretise the experience in a coherent flow. The ideas were spread out following the Game-Changers, identified in the POV. This served as a filtering of ideas, as they were merged if overlapping occurred, and placed in a flow within a potential future state User Journey.

The steps in the entire user journey a person from a company would undergo, would consist of four main phases for the companies to go through. To divide the ideas and how they would shape the service, the User Journey is starting already at the stage of "Awareness and Consideration" and ending at "Completion and Continuous Learning Community".

Concept development, Scenarios and Storyboarding.

The scenarios has the purpose of constructing plausible situations and explore the idea, and explain a service idea as a story, and contain as much detail that it will be meaningful, and can spark discussions. (Stickdorn & Schneider, 2011) The scenarios are then accompanied by simple illustrations to start to imagine how these functions might be presented in the digital platform, as well as play out in the context of the users. Drawing the ideas as wireframes are the method for exploring the possible digital form it would take and functions to be incorporating, without considering the details of the final visuals. The process is inspired by d.School Design Thinking Bootcamp methodology, (Hasso Plattner Institute of Design at Stanford University., 2019) where the concept ideas get named, matched with the game changer, and described in what intended impact it will create, and one key function it will serve.

Alpha Prototype Validation

An Alpha Test holds lower fidelity, but gives the understanding of how the service will work. (Curedale, 2018). This format allows us to test major risks and see if a concept is viable. The questions we get the answers to would be if the concept would be the best solution, if the concept work and if we have a clear understanding of the users needs.

DELIVER

The "Deliver" phase is where the decisions are being made, and the service should be described in such fine detail that the idea is ready to implement and ready to launch. To represent the service, a variety of methods were used to describe the solution.

Experience Prototype

Wireframe Experience Prototype as well as an in detail Experience Map (Curedale, 2018), that was created in order to explain how the user was intended to feel as well as describing the actions.

Value Proposition

The final solution suggestion was also described using Value Proposition was described using Statigizers format for formulating a conclusion, as it provides a structure framing the ideas into pitchable sentences. (Strategyzer AG et al., 2010)

Presentation of Findings for the Client

The final deliverable was a product report summarising all findings and insights found in the process, and was created to create condensed version of all final results, and designed to tell a coherent to story for all highlights in the project.

DISCOVER

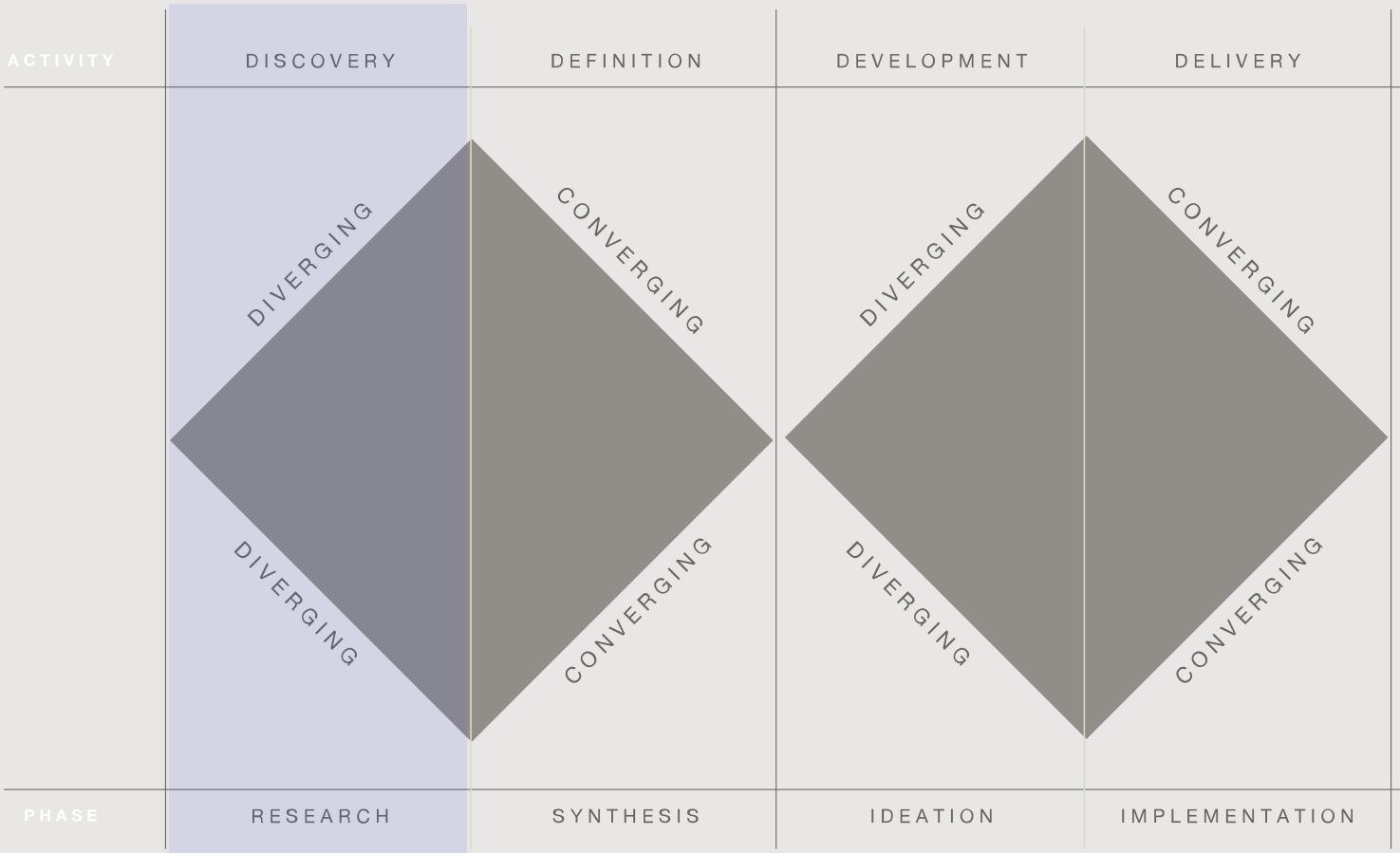
The first phase of the Double Diamond is “Discover”, where a design team is working to explore the problem space and build knowledge through rich and broad research. (Design Council, 2011) The beginning of the project should be spent reviewing and analysis the existing material, conducting more research if needed and explore the subject broadly. This can be stakeholder interviews, analysis of competition and target groups and summarising the perspectives one uncovers.

The discovery phase is also the first opportunity to start to create empathy with the users of the future service. It is important to keep the users in mind, and as the IBM Enterprise Design thinking says, **“Dig deeper than a requirement list. We’re here to understand someone’s wants and needs, worries and goals, contexts and constraints. Building empathy for users and uncovering their needs will always get you much closer to solving business problems than blindly improving your product or service.”** (Design Thinking Courses and Certifications - Enterprise Design Thinking, n.d.)

The initial way that the process came about, was existing long before the theme of the master thesis was to be decided. Therefore the material for the Discover phase, is a mix of primary and secondary research collected throughout 2019 and 2020, that was exploring broadly how and what employees of Danish companies saw as hurdles, needs and wishes were while working with sustainability in a business context.

Having a close collaboration with the design agency Trouble, and the client for the project, The Index Project, enabled me to access their network and get in touch with their target group first hand. The exploration started by looking at current Design Thinking material from the The Index Project, and by summarising the wishes and requirements from the stakeholders. The next scope for discovery was on understanding the context of the target group the Design Thinking resources should be redesigned for. The final stage of the initial discovery was to explore trends in the field of digital facilitation. Here I was looking to get an understanding of how the world around were answering the matter of how to create engaging digital toolboxes and learning journeys.

Process overview



Research conducted in the discovery phase



Understanding the brand and goals

GETTING FAMILIAR WITH THE INDEX PROJECT

The analysis started by looking at the current research material provided by The Index Project, and the overview of tasks as they saw it, that can be seen in the Appendix #1, then summarising the wishes from the stakeholders that were expressed through official meetings and smaller check-ins and continuous communication and dialogue, if any questions came up along the way.

ABOUT THE PROJECT AND MAIN STAKEHOLDERS

The stakeholders representing The Index Project are Education Director, Charlotte Høeg Andersen, and Research and Development Director, Simone Søgaard Jacobsen.

The stakeholders from The Index Project that were my sparring partners throughout the project, are Simone, who is the head of Research and Development processes across the organisation's program areas. She's currently involved in researching sustainability and SDG practices in Danish companies and works with the development of new digital resources, targeting both Danish and international businesses (The Index Project, 2019).

Also an important stakeholder is Charlotte, who is responsible for all initiatives concerning our education programmes for entrepreneurs, startups, educators, company leaders and decision makers. Charlotte has been working within the design industry for more than 15 years, managing design processes and developing design strategies for both companies, project organisations and public agencies (The Index Project, 2019).

The following abstract of visions for the project is based freely on notes from the first check-in meeting, taking place on the 3.12.2019, where I met with the project owners in The Index Project, in order to uncover their motivations and views on the task ahead.



Figure 1: The Index Projects offering of resources as is on the webpage today

Kristina: What is the background for the retargeting of the Index Design Thinking tools?

Charlotte: Because if we take a step back and see “Why is the Index Project in the world?” It has been an 18 year-long journey to work for sustainability. What do we demand from this new toolbox? That it will be simple, and ready to use for everybody.

C: The Design Thinking tools Index is currently offering, is mediated through face-to-face facilitation and context-aware adaptation. This is something we wish to make available in a broader sense. The tools we have are currently organized as what we call the “Design Thinking Compass”, but it requires some explanation and expertise to do the facilitation of the tools in our Compass, as it is at this stage.

Simone: As of now, the program is something we facilitate for the Index Award winners, and also provide for paying companies, where they get a diploma when they finish the course. We envision a future where this is a service, not only for the Index Winners or the companies employing us for teaching them the diploma program, but now in the way we can provide inspiration for sustainable action and lifelong learning with our mission “Design to Improve life”.

K: What are the challenges?

S: We have some self-sufficient facilitator guides, that are typically used for teachers in school, and aimed for school kids. This leads to specific pain points, as for instance, the current way we use design thinking can seem silly and not business oriented enough. There is a huge issue when we reach the stage of prototyping, because people don’t want to seem so childish, and build things with yarn and paper.

C: What we see is that this is a stage where we need to keep them engaged, and recreate this current drop-out phase, into a meaningful stage. Prototyping doesn’t have to be silly. It is all about doing something, taking action and getting started.

C: We need to be aware of the behaviour science and try to find ways to utilise the resources, and inspire, motivate and facilitate the process. There is some work to be done on how to be facilitating the funnelling phase for the companies. How do we make people do these tasks? How can we communicate as simple as possible?

K: Who is it for?

S: We currently have a close connection within a wide variety of companies looking for ways to become more sustainable from across the globe, from startups to bigger corporations, the task is to place people effectively into the box that fits their context. No one will see a tool and dig deeper to see if it fits them. We need to show that we understand them, and make clever suggestions for where they should start out.

C: We should do the mom-test, can you decode and feel confident why you should engage if you had to judge it in two seconds? That’s the reality of most working environments. Separate tools have no meaning without a proper context.

S: The first step is crucial, where the funneling is happening. It can be a self assessment, there we get to find out if we are serving a student, a teacher, a business owner, or an employee. We need them to find their context. The core value proposition needs to be super clear and sharp. We work with Design To Improve Life, and Sustainability. That’s why we are in the world. The Index Project already has the know-how of the effective design thinking tools, and they are well tried and tested. To find a way to work with them but with remote facilitation is key. Focus on a good way to ensure the flow and the progress. We need to give feedback and follow up.

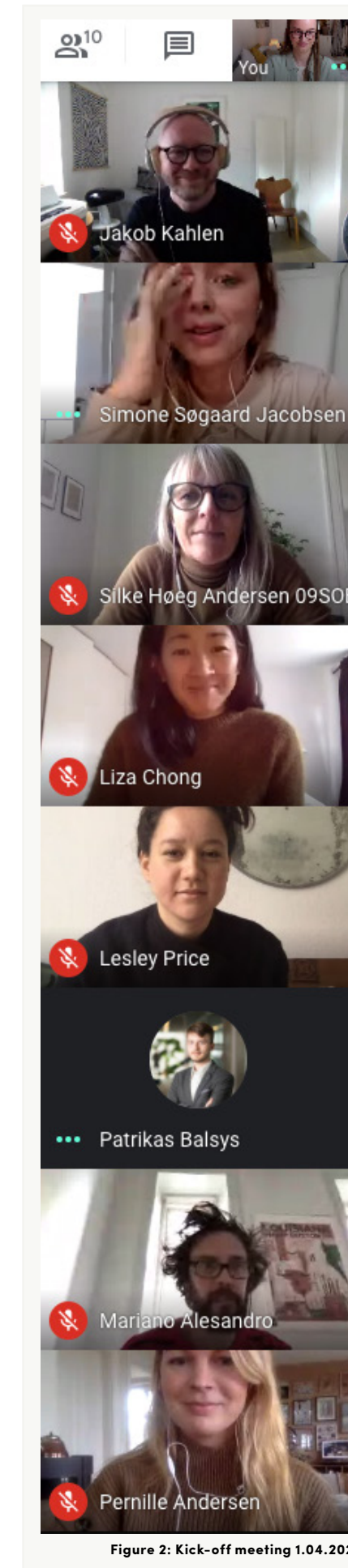


Figure 2: Kick-off meeting 1.04.2020

THE OFFICIAL DESCRIPTION OF THE PROJECT

We’re building a Digital Facilitator

SEE THE FULL VERSION IN APPENDIX #2

After the initial meeting and COVID-19 changing the circumstances and pace of the collaboration, eventually lead to kick-off meeting, where the formal vision and project description and a for the challenge Index wanted to address. This description was shared with me on the 1.4.2020.

What is it?

A digital tool to facilitate sustainable change in companies.

Why?

We want to broaden our reach and offer processes in design to improve life-thinking without limitations – either by human power / geography / distance / cost – we believe scaling the access is critical in supporting impactful businesses.

How does it work?

Using the Digital Facilitator, you can go on a 12-step quest to resolve specific challenges keeping you from working more sustainably. The tool guides you through the process using interactive techniques, instructional videos and more. With the Digital Facilitator, we aim to fill the knowledge and action gap that start-ups, smaller and medium sized companies often face by providing our tools and expertise in a modern and accessible experience.

Why are we targeting businesses?

Businesses hold the potential to drive change for purpose and for profit – driving change through an entire ecosystem is essential to create a sustainable future – for people, planet and prosperity. But in a world full of noise they need a road map, clear and simple, that connects with the people behind the business.

Content audit – Outline of a User Journey for the course

SEE FULL OVERVIEW OF THE MATERIAL IN APPENDIX #2, #3, #4

An asset provided by the Index Project, was their internal overview of the steps of the learning journey, that would become the umbrella for the steps containing a set of tried and tested Design Thinking exercises and methods. The description was developed by Simone S. Jacobsen (2019). The User Journey would be as following:

0 ASSES ORGANIZATION

In a change process it is crucial to take stake of how well aligned you and your team members are with your business' reason for being. This step will help you re-examine as well as remind you why you exist and what you wish to accomplish.

Output

- *Perception alignment in the team*

- *Purpose statement*

1 DEFINE CHALLENGE

In order to solve a challenge you need to know exactly what your challenge is. Defining your challenge and creating a problem statement will help you stay on track.

Output

- *A problem statement*

2 KNOW YOUR CHALLENGE

Now you need to get an overview of what you team already know about your challenge. What often applies in this case, is that we know much more than we think. Completing this step will help you realize what you already know related to solving your challenge, what knowledge you lack in order to solve it, and where to find the knowledge.

Output

- *Research strategy*

3 GET INTO THE FIELD

If you want your final solution to succeed in the real world, you need to consult the real world. Hence, whether you want to change the internal organizational culture, or you wish to develop a new product, you need to put your end-users (e.g. your employees or your customers) to the centre of the process. This step is an operationalization of your research strategy. It will guide you in identifying your users, and help you empathize with their needs.

Output

- *Data about your users and their needs*

4 MAKE SENSE OF YOUR DATA

You've got the data from the field describing your users and their needs. Now you need to make sense of it. You need to break it down, identify patterns and learn from it.

Output

- *Tangible and communicable insights about your users and their needs*

5 REFRAME CHALLENGE

Now that you've acquired some new or additional information about your users, you might

look at your challenge from a new perspective. Maybe your challenge is different now, because you've discovered user needs you didn't know of. This step will help you cross check your problem statement and modify it if necessary.

Output

- *Reframed problem statement*

6 DEVELOP PROTOTYPE

Now's the time to get your hands dirty. This step will take you through the process of generating ideas for your solution, select the one/s to continue working on and finally, building a prototype. Inspiration! The Index Award winners and finalists casebook.

Output

- *A prototype*

7 BUILD STORY

Before you can share your prototype with anybody you need to create the story that sells it. Why should people (again; your employees, your customers or a third user group) buy in on your solution?

Output

- *An appealing story that tells the purpose and function of your solution.*

8 TEST PROTOTYPE

Before you can finalize your solution, you need to get feedback on your prototype to figure out how well it corresponds with your users' needs. Testing the prototype is an attempt to get information about how the future solution will work in a real-life setting. Remember you might have to do a few iterations of testing before you're ready to finalize.

Output

- *Feedback on your prototype*

9 REFINE AND FINALIZE

Once you've collected your feedback you're ready to refine your prototype and finalize it. If you do several iterations with testing, you might have refined the prototype bit by bit, and at this point you just need to do final adjustments.

Output

- *A solution ready to implement*

10 IMPLEMENT

Even though you have a final solution, your work isn't quite done yet. Now you need to implement it. This may be e.g. implementing a new work structure internally in your own business or launching a new product on the market.

Output

- *An implementation plan*

11 EVALUATE AND MAINTAIN

If you want your solution to stay relevant on a long-term basis, you must evaluate it after some time of usage. You'll have to expect that the evaluation may result in needs for adjustment but, that's only natural. Once it gets in the hand of new people it becomes a dynamic, living element that'll be adapted to new contexts and needs.

Output

- *Happy users!*

12 WHAT'S NEXT FOR YOU

Did your solution work out well? Now you should consider taking it a step further. You can scale it to other departments, markets or countries. Or you can apply for accelerator or investment programs in order to develop and strengthen your solution. Complete the exercises to find out which path to follow.

Output

- *New opportunities*

- *How can you take your solution further?*

Understanding the Users – Context Analysis

FIND LINK TO THE FULL REPORT IN APPENDIX #5

THE INDEX PROJECTS FINDINGS ON THE TARGET GROUP

The Index Project has an ongoing process lead, Simone S. Jacobsen, who is dedicated to research relevant subjects, and collaborates with actors such as Syddansk University to conduct research on themes in need of more investigation. One of their big studies they recently collaborated on conducting, was one made to map the current status of Sustainable Development Goals work in Danish companies. The context analysis of the target group is based on the data collected in this big screening report conducted by Index Project, “Mapping sustainability & SDG work in Danish companies”(2019).

The report explores how Danish companies are incorporating the UN’s 17 Sustainable Development Goals (SDG’s) that were released in 2015. The mapping process involved a screening of 362 Danish companies, followed up by 18 in-depth interviews with companies selected from the 300+ group (Index Project, 2019). The screening was conducted across industry groups and was selected across all regions in Denmark based on a network based selection, from micro to large corporations, where the number of employees spans from Micro, 0-9; Small 10-49; Medium 50-249; Big 250-10.000. (Danmarks statistik, 2020).

The main findings from the screening was that 39,5% indicate that they are working with sustainability as a part of their activities, and that 10,8% consider the SDG’s as integrated in their activities. The report concludes that the websites that were screened do not necessarily reflect their actual work on sustainability, but that this external communication can be a part of their brand image and how they see themselves.

The 18 in-depth interviews revealed that 17 out of 18 interviewed companies already are performing activities with the aim of integrating sustainability, but only four of them are currently making a profit on these sustainable initiatives.

The interviewees showed a strong enthusiasm for sustainability, but 14 out of 18 of the companies report that they perceive the concept of sustainability as difficult to grasp. The companies are lacking concrete methods and tools on how to implement and work with SDG’s on an operational level. They express needs for industry targeted guidelines and information.



Nine Dimensions

- Narrating the data

THE NINE DIMENSION FRAMEWORK

The Nine Dimension Framework is based on the ethnographic method created by J.P. Spardley (1980) and is originally from his book "Recording Ethnographic Observations" (Spardley, 1980). The Nine Dimension Framework is used in this context to collect main insights from the screening and interviews in the report Mapping Sustainability & SDGs in Danish Companies. (2019)

The Nine dimension Framework is used to structure and understand all the information that has been collected so far. This analysis uses the insights collected by The Index Project, to describe the following steps; The first step is to write down what the physical space is of the field of research, then describe who the actors are. Next there will be a mapping of the activities performed by the actors. Then look into the objects that are relevant and present, or used by the actors. We also look at the specific individual actions carried out by the actors, and the particular occasions that surface from the research, and a narration of the sequence of events. As well as describing what the actors' goals are, what they are trying to accomplish. It will also help describe how the actors feel in given contexts.

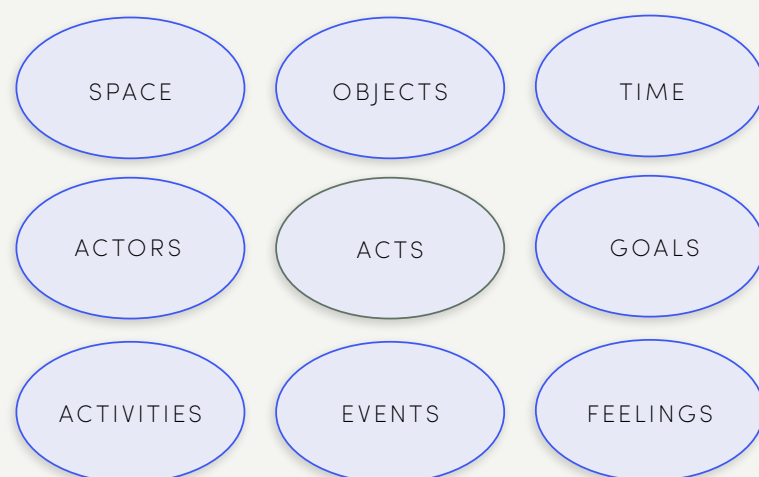


Figure 4: The nine dimensions framework

SPACE - LAYOUT OF THE PHYSICAL SETTING

The users the Index Project is targeting for this project, will be employees at small and medium enterprises (SME's). Therefore, the target group for the investigation took place in mainly small and medium sized enterprises, as well as a few micro enterprises, all located in Denmark.

ACTORS - DETAILS OF THE PEOPLE INVOLVED

Is it reasonable to assume that the target user of the course is in a position of influence within one's team. The number of employees of the SME's, being 10-250 people, will typically require there to be structures, departments and hierarchies at the workplace, which means the actors will have various colleagues, more or less connected to their own role in the company.

ACTIVITIES - THE ACTIVITIES OF THE ACTORS

The companies may try to make ways to integrate Sustainability into their businesses by formalising it as key performance indicators on the same level as any other goal. Certifications are widely used to validate sustainability activities, and they describe how they are missing more legislation and political actions in order to transform industrial struc-

tures. (Index Project, 2019) The answers cohere with the tendencies that the companies no longer believe any actors can continue "business in usual" in order to meet the new realities of the market.

One company working with consultancy described how they work to help their clients work with sustainability.

"Even though the SDGs may be an opportunity, for the majority it's simply a condition given new market tendencies. This is where we can play a role in helping them (clients) translate the framework into concrete actions. It doesn't mean we point out concrete SDG goals for them to work with. Rather we try to listen to the purpose that drives them and help them figure out how they are perceived." p. 10

Based on the findings, it is still a hurdle to find the way to prioritize what activities the company should be prioritized to live up to their ideal ambition level. A small company describes their challenge as: "We want sustainability but, on an everyday level it's hard to dedicate concentrated man hours

to explore the area further when you're a company of only 20-23 employees." p.10

The view of how to act sustainable was very consistent across the companies, even though they were otherwise representing very different fields on the market. The report points out that:

"Variations of circularity, such as 'circular process', 'circular mindset' and 'loop' were all mentioned when the companies were asked to explain their understanding of sustainability, and how they work with it." p. 12

OBJECTS - PHYSICAL ELEMENTS

The report found that 11 out of 18 companies face an increased market demand for products, services or knowledge related to sustainability. It also seems to be a benefit to use SDG's as it is a relatable and easy way to highlight what efforts are prioritized in a graspable way.

One of the companies says: "It can be really difficult to find words for [sustainability related activities] but, the SDG's are hugely illustrative, visual, and that made it much easier to communicate. In the beginning they [physical SDG

cardboard boxes] were only meant for internal use but, I discovered a wow-effect among our external sellers as well; that this is really useful when connecting with customers too." p.12

ACTS - SPECIFIC INDIVIDUAL ACTIONS

Even though it was uncovered that companies had challenges to transform their companies, several of them mentioned personal beliefs and feeling of responsibility as a big factor on their work within the companies. One of the findings from the report was:

"While it is true that no business can be solely fuelled by idealism, several statements suggest there is a boiling idealism beneath the surface. There seems to be a drive to act responsibly that goes beyond profiting." p.14

They pointed out that work on shifting the collective mindset within an organisation was the only way to make sustainable choices throughout the organisation.

"It is a bit messy when you want to make these kinds of changes because it means opting out of something else. We have a few product areas where we can make easy money. As we introduced the cradle-to-cradle certification we automatically signed up to make sure we always complete production processes in certain ways in order to secure sustainability. In the beginning, we had several employees who found this hard to comprehend. 'We could just have made a profit here!' they would say. And we sure could but, then we would have compromised our integrity." p.10

EVENTS - PARTICULAR OCCASIONS

The companies report on seeing shifts in society and the markets they operate, and the quotes from the interviews reflect on how the conversation is shifting out in the Danish workplaces.

"We had an internal workshop for all our employees some time ago. We all had to map our future ambitions for [the company] on post-its. When we looked at all the post-its, many had stated they'd like [the company] to help make the world a better place. It sounds cliché but, it's really a priority among the team members and it's totally a

part of our employer brand". p.15

The work on incorporating more sustainability was something anchored internally, but it also seemed that for some, it was regulations and laws affecting them to make a change.

"And then this happened: we received a procurement from Odense Municipality in which it was directly stated that they had identified 3-4 SDG goals, and we should do the same. That took us a bit by surprise, because how could we relate these goals with our everyday activities?" p.12

TIME - THE SEQUENCE OF EVENTS

The companies point out that the more you get knowledgeable and get to grasp the sustainable mindset at work, they describe it as something like a movement once the ball starts rolling. One company describes it,

"It [the sustainability mindset] suddenly starts to get a real grasp on you. You want to do more. And not limit it to the leadership level." p.15

Another personal way to get engaged and take initiative is the human-to-human empathy as a motivation. One employee says,

"I recently hit 50. I have children and grandchildren. I'm aware of what goes on around us [climate change, waste, consumerism etc.] and if I can contribute just a little to change this, I'd like to." p.15

Some of the companies point to policymakers to empower shifts to sustainability. This way it's not depending on individuals with goodwill and initiative, but a premise to run business. They think it would be a good idea if sustainability was rewarded. The report finds that,

"Several companies point to legislation and political actions as potent drivers in unleashing the potential of sustainability within companies. Furthermore, financial aid from the government will increase the incentive for many companies to experiment with introducing more sustainable processes." p.15

GOALS - WHAT THE ACTORS ARE ATTEMPTING TO ACCOMPLISH

One of them stated quite accurately what the main concern and goal most companies might be challenged by in terms of transitioning to become a sustainable company. The quote reads,

"When we were presented with the SDG's we thought 'Now what's this, and how

can we take this into our company? How can it become a business?' Because for us, it's crucial that you can run it as a business". p.13

The goals for the companies varied, and many had a hard time grasping the term overall, and then as the only natural, the concrete goal setting can be difficult, and seem like a big hurdle to overcome. The report found that,

"However, more than 2/3 of the interviewed companies express difficulties grasping the concept of sustainability. Variations of 'what does sustainability even mean?' and 'we lack a proper definition of sustainability' are repeated among them again and again." p.11

It was clear from the report that sustainability is hard to grasp and define, and that certain connotations linked to what accomplishing sustainability in a company context looks like.

"The word 'circular' is mentioned 97 times across the interviews, despite it not being included in any of the questions in the interview guide. Opposed to this, 'green' is mentioned 21 times in a positive context, often coupled with 'energy' or 'transition', while it appears 22 times as 'greenwashing' in a less positive context." p.13

FEELINGS - EMOTIONS IN THE GIVEN CONTEXTS

The quotes from the interviews testify that it still is confusion and tension tied to being a small player, trying to grasp sustainability.

"The smaller the company, the greater the problem a lack of resources seems to be. Changing mindsets, both internally and externally, appears to be one of the main challenges when introducing sustainability. This applies especially for companies in construction and production fields, as well as SMEs." p.11

They advocate for picking a field to put the efforts, rather than being overwhelmed that they can not solve it all.

"Someone forgot to tell us that it is legal to pin out a few goals that you believe your company can make a difference with, instead of trying to target all 17 goals. When the media or politicians communicate about the SDG's it's always about the entire package. And I think that scares some companies away". p.13

The report concludes an overall enthusiasm and positive experiences and states,

"When we look at the interview statements about how the companies work with sustainability and

SDG's, we see that quite a few of them (10 out of 18) do some sort of activity with the aim of changing mindset and agenda around sustainability and the SDG's. They share good stories, deep knowledge and unique experience in order to spur a realisation that sustainability and the SDG's can benefit the business. These activities are performed internally in the companies as well as externally among clients, suppliers or other companies." p.13

Mapping sustainability & sdg work in Danish companies

The Index Project

The Index Project

INDUSTRIENS FOND

SDU

Figure 5: Index Report

Participatory Design Workshop

INDEX CONFERENCE TRACK - EXPLORING “TANGIBLE SUSTAINABILITY IN EVERYDAY LIFE OF BUSINESSES”

Prior to the master collaboration being formalised, I was able to explore the topic of “Tangible sustainability in everyday life of businesses”, by being a part of designing the workshop and facilitating an co-creative workshop at the The Index Project Award conference in September 2019. This gave me an opportunity to collect data, participate and interact with the participants, representing The Index Projects network, as I at the time was doing a Service Design Internship at the design studio, Trouble.

With the team of four colleagues from Trouble, we had created a set of exercises that resembled roleplay where the teams were working with fictive business cases, and using their experience to identify what might be blocking sustainable change from happening.

The exercises were created with the aim of identifying mindset barriers standing the way of sustainable shifts in companies across industries. The workshop was conducted putting together four diverse teams, with approximately 30 participants from various backgrounds and origins all attending The Index Award Conference.



Figure 6: See all the results in appendix #6 from Troubles tasks at the conference



WORKSHOP TASKS

SEE THE TASKS IN APPENDIX #6

The workshop was structured in three parts. The first task was to select one of the five fictive business cases, get acquainted with the team, and do a silly energizer to break the ice. The group then had to read out loud the information about their imaginary business, with a provided factsheet, and talk about if they knew any real business resembling the fictive they were working for. The cases were named WeShip, WeWeare, WeBring, and WeWater.

The second part of the roleplay, was to be opening a mystery envelope containing a highly ambitious mission statement, resembling the surprise outcome coming from a higher level in the hierarchy. The Mission Envelope contained a highly ambitious goal for how to transform their business into a sustainable direction, with a goal that was on purpose set unrealistically high.

The task was then to ideate and agree on at least three barriers blocking the change from happening. The participants were asked to, with the business case and your personal experiences in mind, think of possible barriers a company like this might face. The team, then presented for each other, and clustered their ideas. The team was then asked to do a dot-voting in the barriers they found most feasible and relevant for the team to attempt to explore and solve. The barriers were then transferred to a templated Presentation Poster, to help framing the data.

The third and final part of the workshop was where the teams had to think about solutions. They were asked to individually think about what the company could do to address these barriers. A. What could they do starting today to overcome the mindset barrier? B. What should they aim to reach within a year? Consider the barriers you encountered in your own work life and what you've done to get to solve them.



INSIGHTS

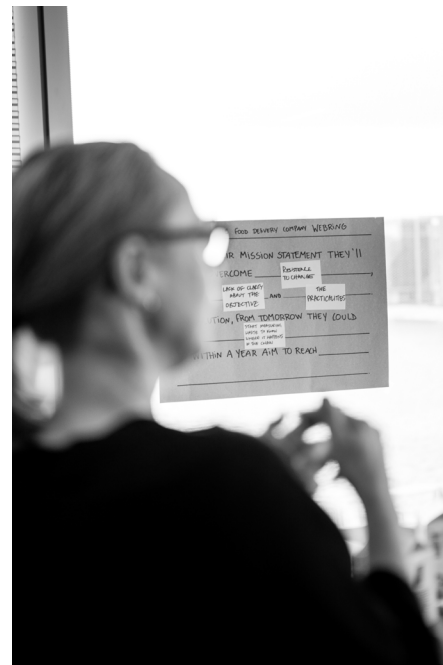
The key takeaways as a facilitator and creator of the workshop was that everyone attending had first-hand experience to share about mindset barriers in their companies.

Participants contributed and had a relationship with this topic instinctively, and this made us confirm that mindset barriers is a topic worth addressing.

At the time reflecting about our takeaways with the team from Trouble, were that interacting with this kind of “woke” people on the sustainable mission was inspiring, and gave a great mutual learning opportunity and felt enlightening and energising in every way. We felt like our focus area should be to find a way to spark these conversations and ignite action-mindedness out in the real world.

OBSERVATOR TAKEAWAYS

The main takeaways, formulated from the perspective of the anthropologist observing the workshop and taking field-notes, was condensed and described in The Index Conference report “Business x Sustainability – Conference Insights”. (Index Project, 2019) The report references that mental barriers often can be the main challenge when pursuing change. The creation of a triple bottom line will lead to a positive impact on more levels, and finally, that it’s important to translate the abstract goals into tangible employee actions. Quoting Troubles representative, hosting of the workshop, Martin Hansen, “Tools are important, but it’s more important to get everyone to work with them”. (Index Project, 2019)



BARRIERS:

The workshop ended in a sharing session, where the results were the most relatable mindset barriers across the teams were:

- Money first mentality
- Lack of clarity about the objective
- Conflict of interest and commitment
- The practicalities overriding the goal
- The nature of the organisation structure
- Internal resistance to change
- Innovation ability required
- Leadership prioritisation
- The company culture
- Cost of change

THE CO-CREATED SOLUTIONS FOR THE CASES

Starting from tomorrow

- Start mapping interests and facilitate negotiation channels by inviting stakeholders, and involve employees to ensure they integrate their ambitions. Set a deadline!
- Start acting out the strategy in real life.
- Create a small unit that have the mandate to gather around sustainability
- Introduce visible measures of success.

In a year they should

- Create a transparent channel so everyone can follow the progress, and send out a monthly update on how the transition is going.
- Reimagine the bottomline, and define a focus with the Triple bottom line approach.
- Focus on the relationship with the government, and make stronger relationships with decision makers.
- Be at a place where everyone internally agrees and understands what a zero waste company looks like.

Unmet Needs

The Unmet Needs are used to sharply formulate what the root and cause of the problems are, and what is holding people back from overcoming them. The content of the analysis, is based on the workshops, sources explored throughout the discover phase. The tool is inspired by work from economist Theodore Levitt, and his famous notion from that “People don’t want quarter-inch drills. They want quarter-inch holes.” (1983) Meaning we have to understand the “Unmet needs”, in order to come up with innovative ideas. The framework of the unmet needs is described based on a co-creation workshop with Simone S. Jacobsen, Research & Development Director at The Index Project.

The two-hour workshop was conducted remotely on Miro, a collective real-time board, allowing both parties to add virtual post-its and see the same whiteboard of post-its and templates. As preparation, I had filled out the template of the unmet needs in advance, based on interviews and different sources of previously gathered research material, provided from the Index Project, where most data was gathered by Simone. We then went through the answers in a storytel session, reading up what I had understood, and with her giving feedback if I interpreted the data as she had understood the answers.

The method is structured by answering five significant questions.

Step one is a matter of describing what motivates and makes the target group distinct, and how their context is. The next step is trying to concretise and get to the root cause of the problem they are facing. The third step is describing what workarounds are currently used in order to get around the problem themselves. The fourth step is looking at why this need has not yet been satisfied, and what news is in need to solve it. The fifth step is describing why it is important to solve the problem, and what the solution to this challenge might change for the users.

UNMET NEEDS FRAMEWORK

Whose unmet need is it?

The target group are working in micro to medium sized enterprises in Denmark. In relation to sustainability, they are curious, open, but some are frustrated translating sustainability and SDG's into their own field of business.

Context of the users:

Many are tied up in the day to day operational and resource-related activities, and they care deeply about their staff. The people are working in various industries, but what they have in common is that they can be described as experienced and proud of their field of work and business.

What is their unmet need?

The SME's need something that can help concretise how (operational) to work with sustainability and why (communication) they should work with the SDG's.

They need tangible and functional ways to integrate it, in a manner that is adapted to the reality of their work-context.

The root of their problem:



Figure 7: View all notes in appendix #7

The economy, and how to be ensuring funds and income, is a big challenge when dealing with how to incorporate sustainability in a profitable way.

The economical aspect is the top constraint affecting these businesses. It can be difficult translating sustainability into their tangible context and seeing new feasible ways of adapting new ways of working incorporating sustainability into their company culture, communication or product development.

They can face these challenges due to conventions in their industry, restrictions due to legislation or priorities in internal product development. The employees are still “woke” and open for input, and see sustainability as something positive.

How is this unmet need currently overcome?

They are currently working on securing their business, and mostly focusing on optimizing resources and ensuring the economy of the company. The current way is setting intentions and generating ideas but they are not yet embodied and acted upon in everyday execution.

Why has this unmet need not been satisfied?

They have an unmet need to be inspired to take initiative and need to be called to action. It can be a need that has priority due to external expectations from form influences such as policymakers and legislation, and a way to distinguish themselves and meet market demands for sustainability.

They want to work more visionary and see potential in changing the mindset and work culture, and they wish to put aspirations into action.

Defining Workplace Personas

SEE THE INDEX PROJECTS SCENARIOS IN APPENDIX 3

One of the significant assets provided by the Index team, was a scenario mapping, that was developed based on the clustering the issues discovered in the in depth interviews. Their data pointed to that there are in total six main causes that can be obstacles preventing sustainable change from happening in the companies. Their possible scenarios are categorised, Company Culture, Industry, Legislation, Product Development, Communication, and Economy. (The Index Project, 2019) The motivations sparking the wish for change can be internally driven, or more external pressure.

The target group of the main sponsor Danish Industry Foundation is the SMEs, which can take many forms and vary greatly. This there is a big division in the realities of the companies resources, team constellations, hierarchy at the workplaces, and conditions to set ambitions and succeed are spanning widely if the company is a micro sized startup to if it is a small enterprise, or the medium sized enterprises. This is why instead of developing personas, taking form as individuals with names and characteristics, for this project, there will represent three “Workplace Personas”, using the size of the company to define the characteristics.

The personas are created in order to describe a group of workplaces with similar interests, challenges and characteristics, and will try to condense the research insights gathered so far as well as imagine an even richer picture of how the Index Scenarios are present in realities of the target group. (Stickdorn & Schneider, 2011)

PERSONA #1 THE MICRO-ENTERPRISE

Who:

A team with less than 9 employees, within the first two years of establishment. Flat hierarchy, where everyone involved is in contact either remotely or physically and the team has the capacity to be aligning daily.

What:

The startup is started with the incentive to be using creativity and aesthetics combined with a wish to create sustainable impact. The business is operating in a niche market, where they are mainly focused on selling directly to consumers. They are not afraid to be taking chances and go down unconventional paths, and explore alternative business models in order to achieve their revenue stream.

Attitude towards sustainability:

A core foundation of the business model is to be first and foremost sustainable and ethical, providing innovation to their field of business.

Scenarios applying to this company:

Product Development

We want to develop a sustainable product or service. We don't have any experience with developing sustainable products or services and it's a jungle finding out where to start and what to prioritize.

Communication

“We want to communicate our sustainable practices more strongly. We lead sustainable activities but, we never spent much time creating storytelling that helps internal and external people understand why and how we do sustainable business.”

Economy

“It's difficult to secure funds or income for our business. We struggle with generating enough income or attracting investors to fund our business and we

don't know what to do differently."

PERSONA #2 THE SMALL-ENTERPRISE:

Who:

A team with around 25 employees, with almost five years since establishment. The team is divided in two offices in Denmark, one in Sealand and one in Jylland. They are organised internally between five departments.

What:

The company is producing everyday products, their business is mainly operating in the B2B market, as well as a smaller fraction of their sales that are to direct to consumers. They stand out from others in their industry, and hope to be chosen due to their sustainability, keeping others supply chain.

Attitude towards sustainability:

Being a sustainable business is at the core of the company, and something everyone is aware of across their areas of responsibility.

Scenarios applying to this company:

Industry

"My industry is resistant to make changes towards more sustainable practices. It is very old-fashioned and profit oriented. Hence, it becomes difficult to lead a sustainable change when our suppliers and partners are not willing to challenge their views on how to do business."

Legislation

"The current legislation prevents my business from moving ahead with a sustainable development. We're a small player in the field and due to lack of legislative incentives, such as VAT exemption and financial aid programs, we struggle with unfair competitiveness."

Communication

"We want to communicate our sustainable practices more strongly. We lead sustainable activities but, we never spent much time creating the storytelling that helps internal and external people understand why and how we do sus-

tainable business."

PERSONA #3 THE MEDIUM-ENTERPRISE:

Who:

A team with about 120 employees, within the heritage of 20 years since establishment. The team is divided out to three offices hosting different departments in Copenhagen area, as well as an department in Fyn, and one in Jylland.

What:

Are working within industry and production, where they have several business branches, and a somewhat complex supply chain and partnerships. It is typically a family business, private equity or a private Companies.

Attitude towards sustainability:

The company is tradition based and has had a long steady business growth history. They have over a longer period been doing CSR initiatives, but several of the business branches could potentially benefit from an even more sustainable tweak. They now recognize that the market demand is shifting, and some departments and individuals wish to challenge the traditional conventions and rethink the business model and supply chain.

Scenarios applying to this company:

Company Culture

"I want to change our company culture towards a more sustainable mindset. We are changing our internal production and work processes in order to support a sustainable change but, it is difficult for my employees to understand and accept the change."

Industry

"My industry is resistant to make changes towards more sustainable practices. It is very old-fashioned and profit oriented. Hence, it becomes difficult to lead a sustainable change when our suppliers and partners are not willing to challenge their views on how to do business."

Product Development

"We want to develop a sustainable product or service. We don't have any experience with developing sustainable products or services and it's a jungle finding out where to start and what to prioritize."

Competitor audit & Benchmarking analysis

APPENDIX #8 AUDIT OF DIGITAL FACILITATION

The audit of the competition and inspiration is done to get an overview of how others solve a similar problem as The Index Project’s new platform of the Design Thinking Course wants to serve. This Benchmarking analysis is based on a Audit Framework from Marco Spies book, Branded Interactions, and is used in order to compare the other platforms to each other in a structured way. (Spies, 2015) This analysis is done to know how others have solved a similar problem, and can help in the design process if we attempt to solve it even better. Looking at the webpages, it can be a good idea to focus on features, ease of use, and their technical excellence.

CRITERIA FOR BENCHMARK SELECTION

The competitor audit of a selection of toolkits operating in a similar market segment, providing e-learning and digital facilitation to guide users through a learning process. The criteria of selection of benchmark platforms to be a part of the evaluation was chosen as they have a take on how to use a digital facilitator and all are some sort of learning journey, instructing users to follow steps and instructions. They were selected because they are all attempting to be serving similar needs, as Index Project will be providing resources for.

All the platforms that are chosen as they are commonly known and are targeted to a broad, global target group operating in a broad variety of contexts. Some of the brands have multiple courses for different use cases and interests. The accessibility varies, as some are paid courses and some are truly open and free resources.

The criteria for rating were selected being mindful of how e-learning experience and their features are working, and how fluid such self-taught learning experience is being facilitated.

The evaluation was ranked with a one to six rankings, where one being poor, two being adequate, three being satisfactory, and four being good, five being excellent, and six being outstanding.

THE EVALUATION CRITERIA

- Ease of use and navigation
- The efficiency of use
- Value of information and content / Help and documentation
- Media appropriateness

METHOD FOR RATING

The rating was conducted combining two independent datasets, as senior design practitioner from Trouble, Martin Hansen, was participating in the audit along with me. We first did the evaluating independently, where Martin was asked to read a short introduction in a PowerPoint, before investigating the page himself. The introduction described the purpose of the platform and brand behind it, summed up remarkable public facts about the accomplishments such as users, and contained a short analysis of what the toolbox contains and how the content of the course was taught. There was also one page describing the most outstanding features with screen shots, to help find the most important thing to focus on while auditing the page. We later went on to fill out the immediate reaction in numbers 1 to 6 as the audit went on, to quantify the impressions of satisfaction with the various pages.

The content in the cases are also outside the direct market of tools, but also provides online facilitation and e-learning in a clear and impactful way, all focus on user-friendliness and state of the art interaction design, but in very different manners where some takes a more formal direction, and one that is more fluid and fun for educational purposes.

How do you do it?							
Evaluation Criteria	Elements of AI	Circular Design Guide	IBM	HI Toolbox	Remodel	d.School library	Open Ideo
Ease of use and navigation	1						
The efficiency of use	2						
Value of information and content / Help and documentation	3						
Digital media appropriateness	4						

Example:
Please write your evaluation in numbers under the case you just viewed. :-)

Figure 8: See whole audit in appendix #8

THE COMPETITORS THAT WERE COMPARED IN THE AUDIT WAS:

Elements of AI, from University of Helsinki and Reaktor for the The Finnish Presidency of the Council of the EU (EU2019fi) working to “We want to encourage as broad a group of people as possible to learn what AI is, what can (and can’t) be done with AI, and how to start creating AI methods.” (A Free Online Introduction to Artificial Intelligence for Non-Experts, n.d.)

IDEO Open, who have a platform with challenges and resources, working to “Bringing people together around social problems and Design Thinking challenges.” (Social Impact Powered By Design Thinking – OpenIDEO, n.d.)

The Circular Design Guide, from IDEO in collaboration with the Ellen MacArthur Foundation. “We’ve lined up a number of activities to help you understand, define, make, and release circular innovations.” (The Circular Design Guide, n.d.)

REMODEL by Danish Design Centre, that is a free toolkit that helps you explore and develop new business models for physical products based on open source principles, working to “Danish Design Centre strengthens Danish SME’s by helping them to generate growth through design.” (REMODEL — A Toolkit for Open Source Business Models, n.d.)

Hyper Island Toolbox, who are working with “This is a toolbox for anyone who wants to do things more creatively and collaboratively in their team or organization. It’s a collection of methods and activities, based on Hyper Island’s methodology, that you can start using today.” (Hyper Island Toolbox, n.d.)

d.School Public Library, by d.School at Stanford University, providing knowledge and design methodology. “We love libraries as much as we love design (almost). That’s what inspired these digital collections. They’re built to help you go beyond the basics and dive deeper into the nuances of design. So pull up a chair, settle in and explore.” (D.School Public Library, n.d.)

IBM Enterprise Design Thinking, a course aiming to teach teams to gain skills and earn certifications working to “Apply design thinking to complex teams, problems, and organizations.”

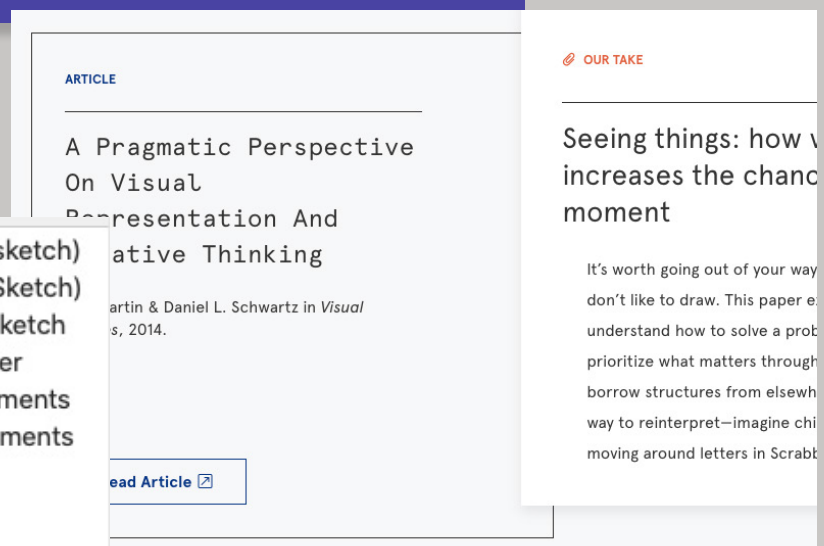
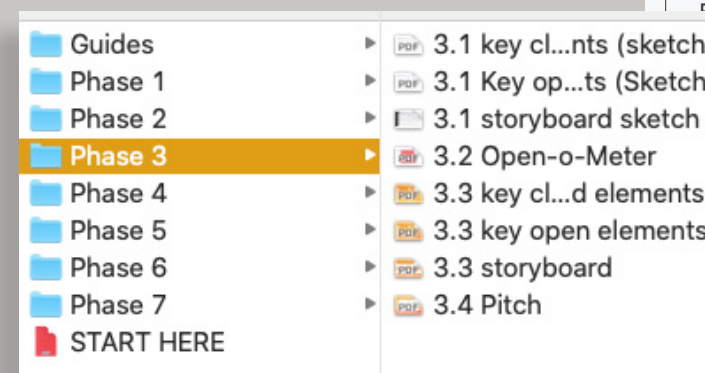
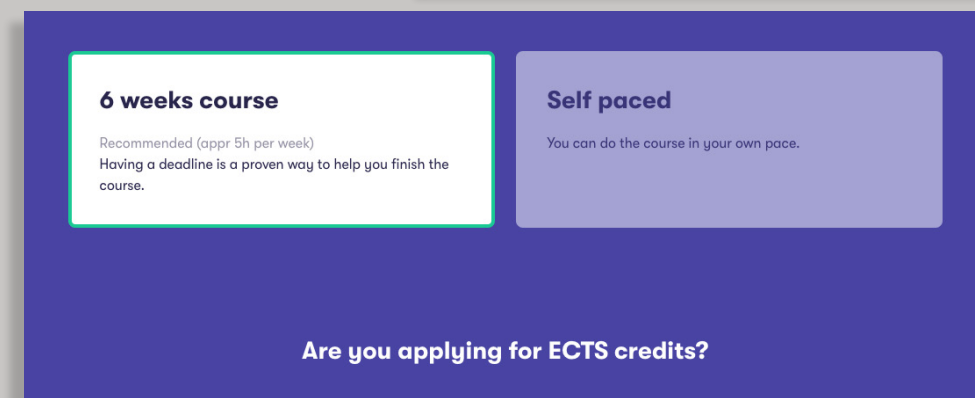
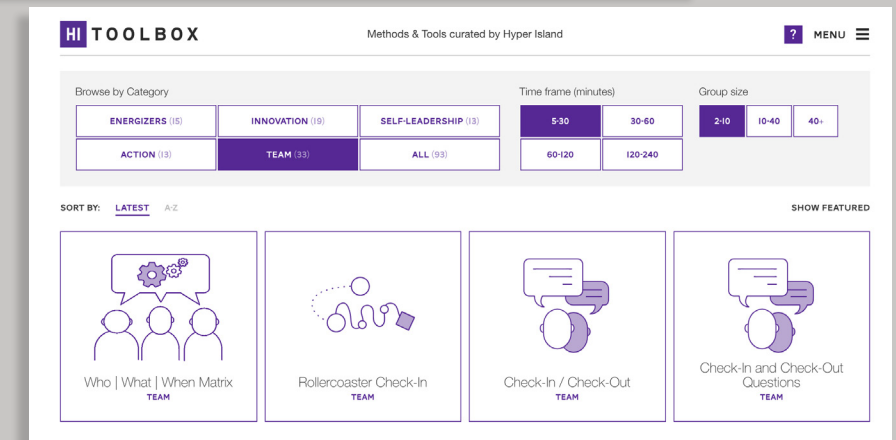
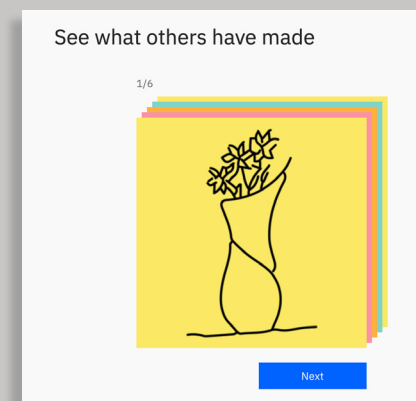
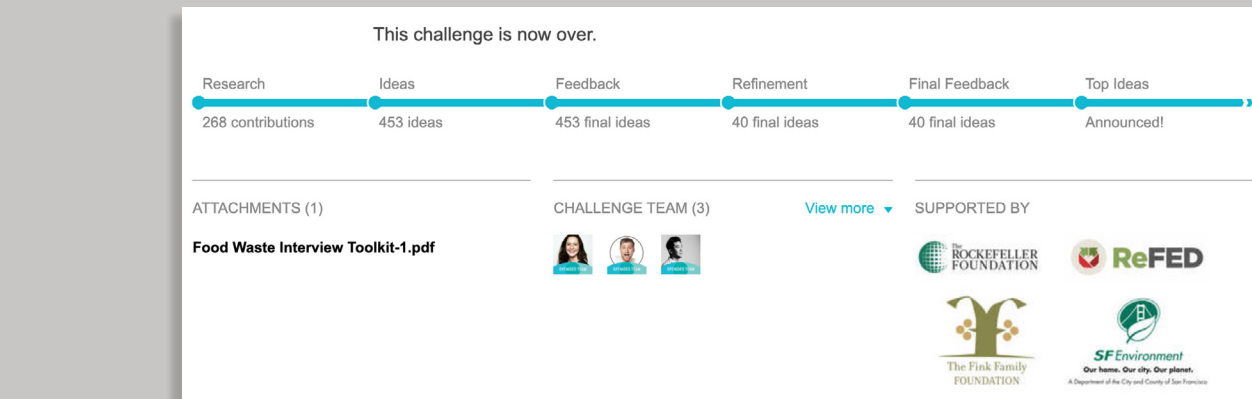
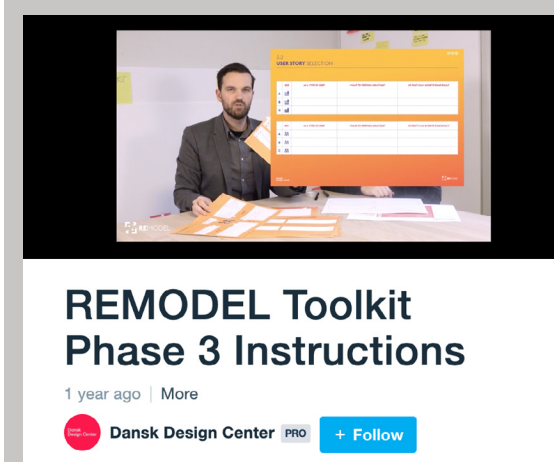
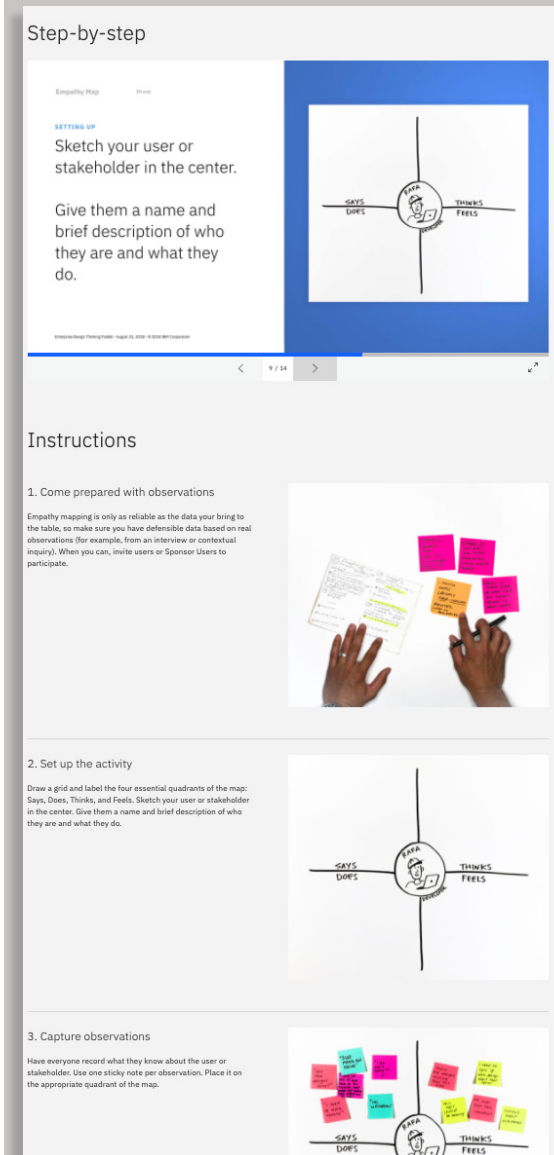


Figure 9: Screen shots in appendix #8

Evaluation Criteria	Elements of AI	Circular Design Guide	IBM	HI Toolbox	Remodel
Ease of use and navigation	5	3,5	4	4	2,5
The efficiency of use	3	3	3,5	3,5	2,5
Value of information and content / Help and documentation	4,5	4	5	2,5	3
Digital media appropriateness	4	1,5	5	2,5	3
Average Score	4,12	3	4,37	3,12	2,75

BENCHMARK RESULTS

The comparison made IBM Enterprise Design Thinking platform the most inspirational case, as it scored the highest in each level of utility. The page holds a high quality, as it is facilitating the user, by providing a clear structure for navigation throughout the learning journey, and the participants at all time will know what to expect from time, lessons, and team size.

Looking more closely at the features, it is especially good at making the user aware where in the process one is, and how long until the chapter is completed. It holds multiple use cases at the same time, and allows the user to break it up in smaller sized tasks.

The facilitation of the learning assets is using a mix of video, short cases, quiz format, free fill out text answers, and even drawing and regularly lets you see your answers in comparison to other participants' answers. The tools are described both as a step by step presentation, but also shows the steps in even more detail and as it would look during the process, as an in depth preparation if needed.

The lessons are clustered with different badges according to difficulty level, and describe skills and knowledge to earn each batch, to clarify what is expected from you.

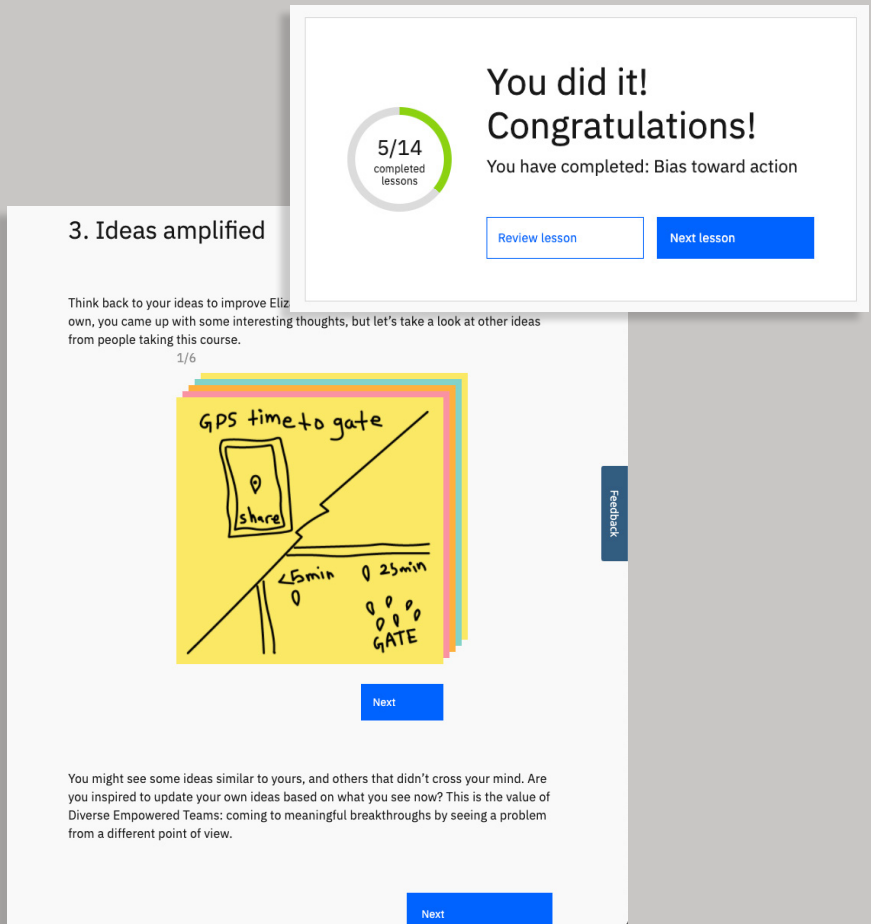
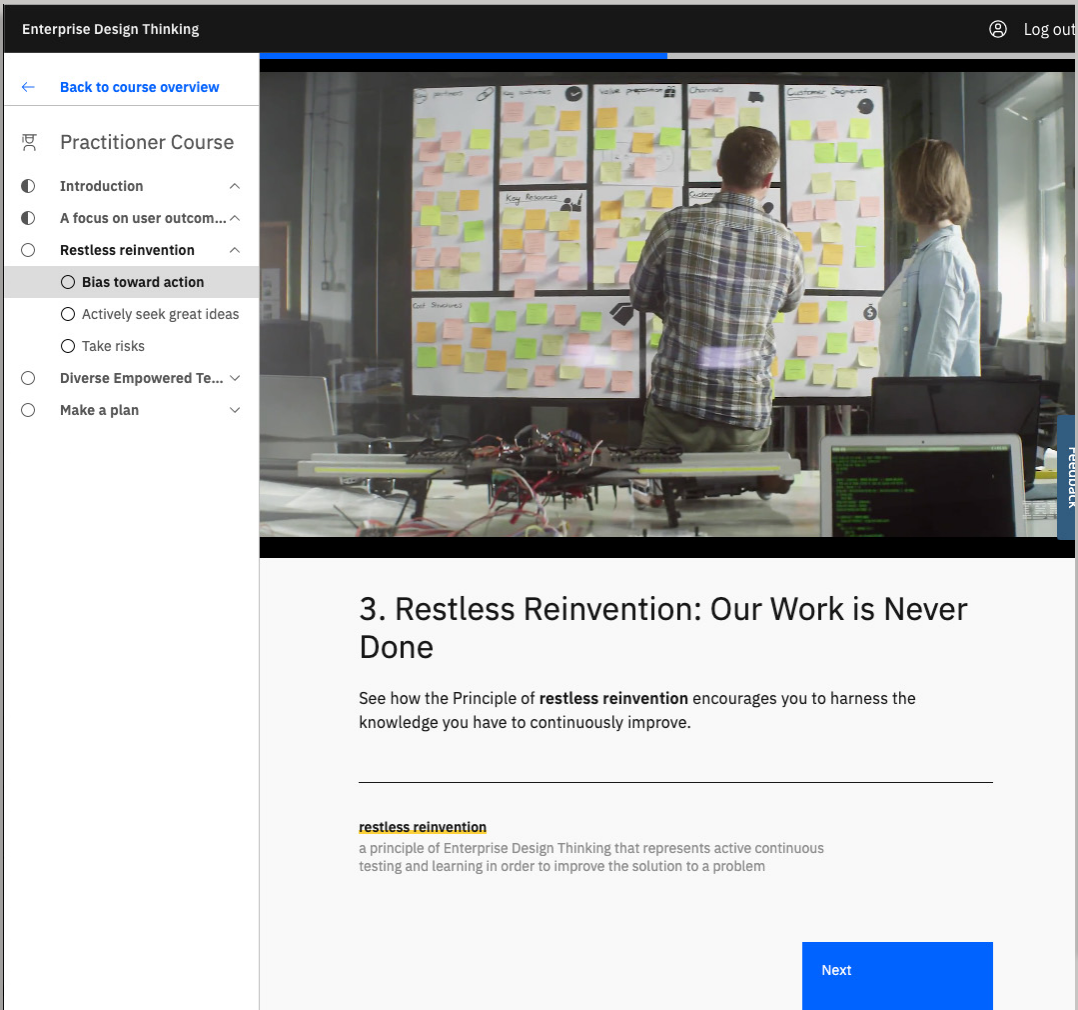
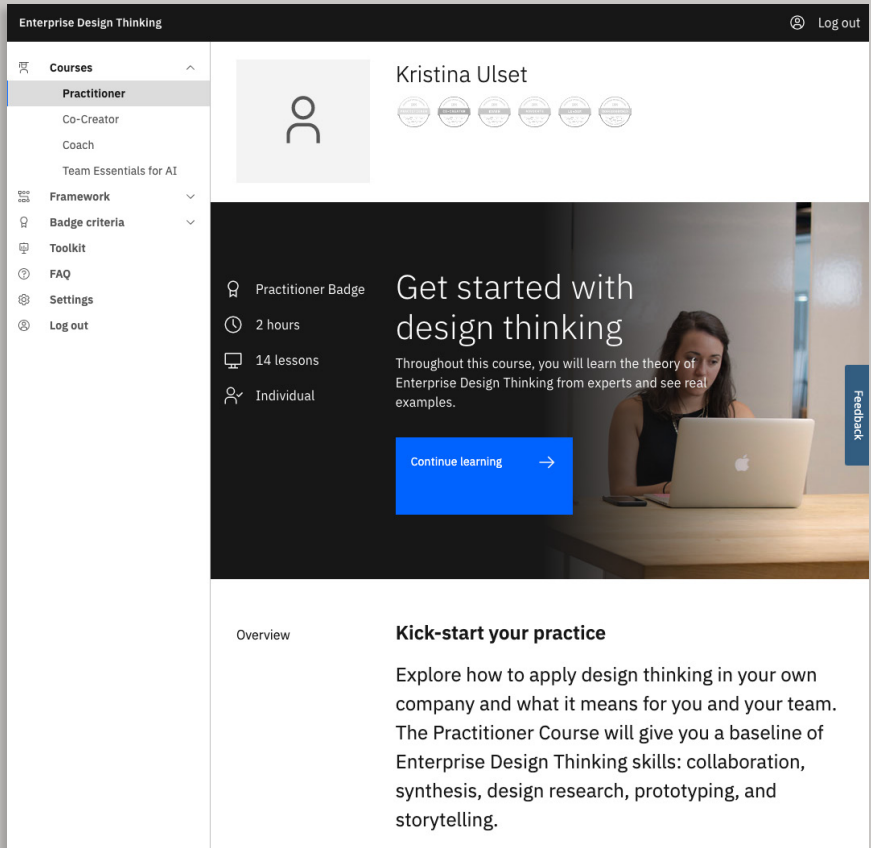
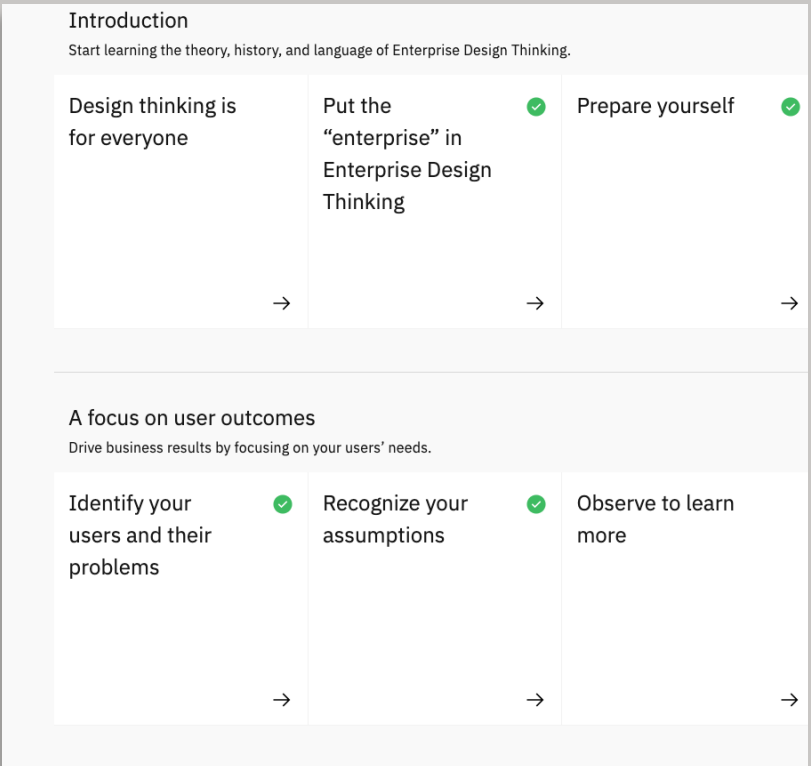


Figure 10: See whole audit in appendix #8

DEFINE

The “Define” phase is where the knowledge collected so far is synthesised and the team will end up with a clear challenge formulation and brief to work on further. Once the problem is illuminated from every angle and broken down it will now be possible to understand the actionable tasks. The Define phase ends with a fundamental challenge and problem to try to solve and a strategic direction for further work.

The divergent phase of Discover the area of investigation was explored with a wide view using the thesis problem formulation as the guiding star.

The Service System Design

Thesis Problem formulation:

Help The Index Project democratise their tools and resources, by utilising service design to craft a digital learning experience, explore remote facilitation, having a digital platform as the vehicle of change for sustainable business transformation?

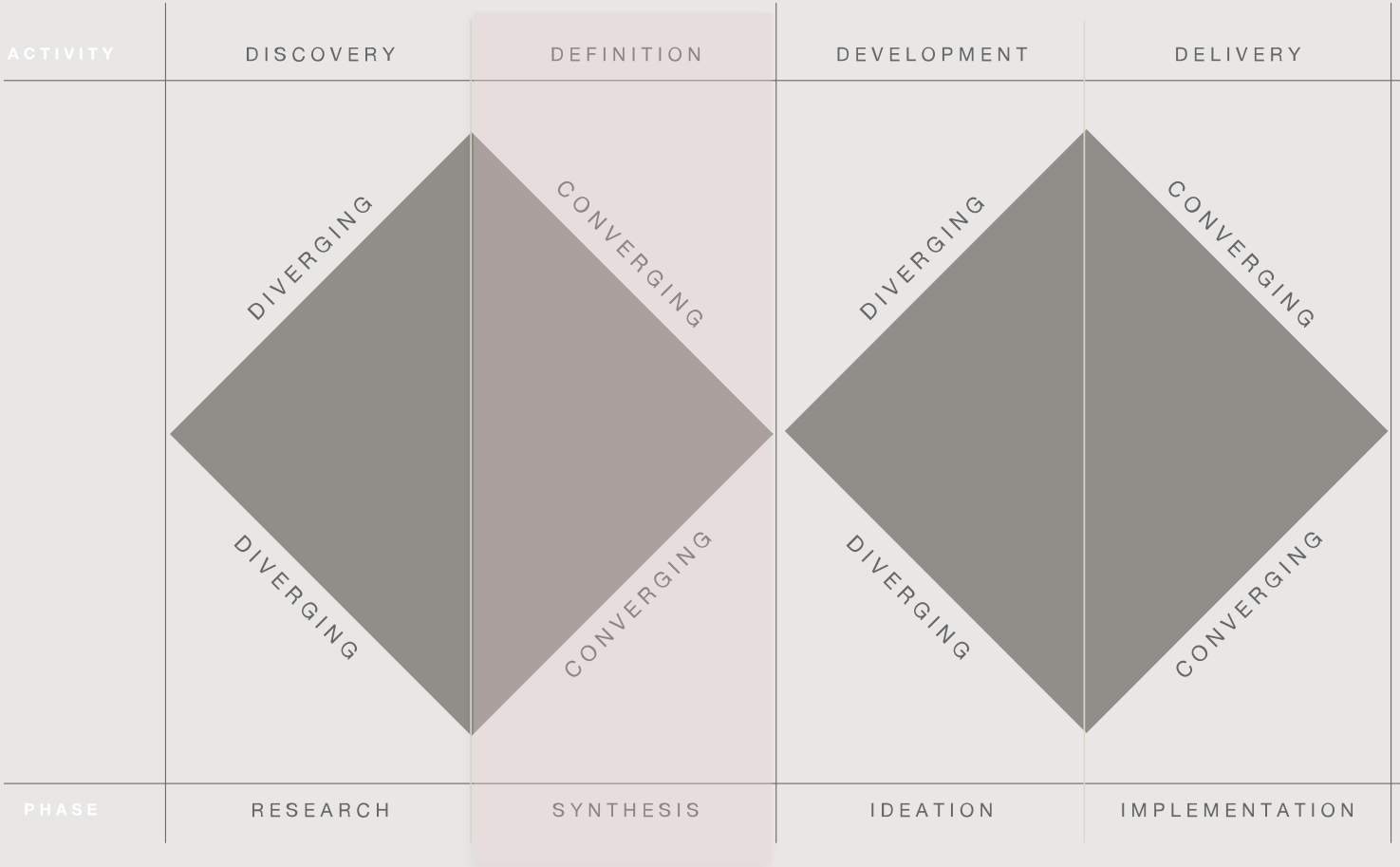
DEFINING STRATEGIC DIRECTION

In the Define phase, the first loop of converging result in a sum up of the business goals uncovered in Discover.

The Index Project provided a brief, and with this as the base we can clearly define the challenge. Reframing a challenge, means we will examine closely what this means, and keep in mind that the purpose and vision according to the interview with the stakeholders are to “*The Digital Facilitator For Sustainable Change - A digital tool to facilitate sustainable change in companies*”, where sustainable change can be understood broadly from social to environmental improvements.

Based on the goals of the brand, a set of design principles should be formulated and explored. The project purpose moving forward, will be to explore the digital facilitator using their definition of the purpose they provided in their official brief. The Define phase will start to explore what principles the design should follow, and how the ideas and aspirations can be translated into an digital tool, that sets the frame for this project.

Process overview



Synthesising in the definition phase



The Vision Of The Brief

“With the Digital Facilitator, we aim is to fill the knowledge and action gap that startups, smaller and medium sized companies often face by providing our tools and expertise in a modern and accessible experience.

Using the Digital Facilitator, companies can follow a 12-step quest to resolve specific challenges currently hindering their sustainability. With the Digital Facilitator, we aim to fill the knowledge and action gap that startups, smaller and medium sized companies often face by providing our tools and expertise in a modern and accessible experience.”

FROM APPENDIX #2 THE INDEX PROJECT KICK-OFF BRIEF

Defining Direction – Reframed challenge

CHALLENGE FRAMING

The reframed scope of work are structured by help from five questions to frame a design challenge (Hasso Platter Insitute of Design at Standford, 2018). This is a tool aimed to help create an actionable direction for further work.

WHAT

Redesign the experience of using

Index’s collection of tools and methods, previously packaged for different target groups as “The Design To Improve Life Compass”, into a digitally facilitated Design Thinking learning journey for Sustainable Business Transformation.

FOR WHOM

For companies across industries and at different stages of development looking to incorporate sustainability, **while considering**, The Danish Industry Foundation and their request to make available resources and tools especially fit for Danish SME’s.

CONTEXT

In a world where there is a large market demand and expectation for sustainability effort from businesses. **Keeping in mind** “sustainability” seems to be perceived as an intangible term to grasp in a viable business perspective.

GOAL

We aim to empower workplaces and facilitate sustainable innovation processes remotely.

THE CRUX

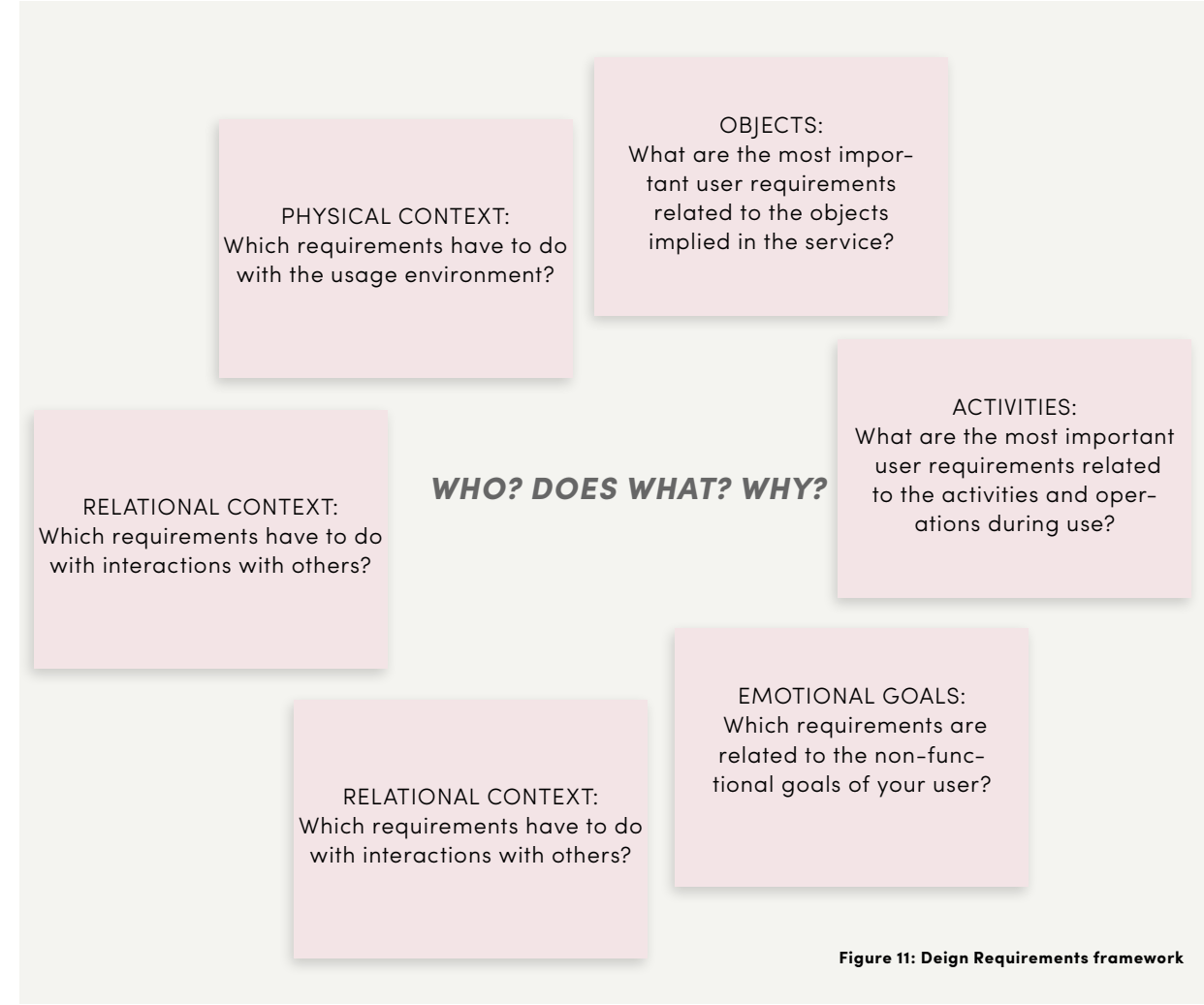
We really need to figure out, how to make a platform fit to facilitate and motivate across differences in the businesses challenges, ambitions and commitment levels to the processes.

Defining Design Requirements

DESIGN REQUIREMENTS FRAMEWORK

In order to establish requirements and expectations from the Index Project team, all findings and communication with stakeholders are summarised in a set of direction giving principles. The requirements are based on the interviews and meetings, and project kick-off with the stakeholders. (See all stakeholder meeting notes in appendix #9).

This framework is freely interpreted based on the template “Design Scope: Design Requirements” by the Service Design Toolkit (Service Design Toolkit, 2011). “Design Scope: Design Requirements,” is a tool that is capturing the most critical service requirements based on describing the service through answering sub questions to the easy sentence; “Who? Does What? Why?”.



SELECTING DESIGN REQUIREMENTS

SEE THE ORIGINAL IDEAS IN APPENDIX #10 DEFINING THE DESIGN REQUIREMENTS

Through an ideation session, clustering all findings collected at this point, mind-mapping exercises were used in order to represent a variety of angles of the most fundamental needs, it ended up defined as six principles making up the Design Requirements.

The definitions were based on an ideation session using mind mapping to have a broad variety of angles to explore the most fundamental need. Selecting the final ones, were essentially weighted up to the question; Which requirements would make the most difference if you offered a good answer to them?

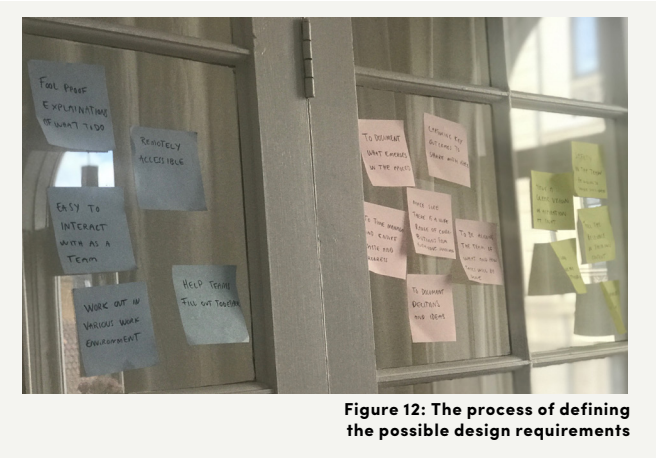


Figure 12: The process of defining the possible design requirements



Exploring Design Requirements

After deciding on what wordings would be the ones to bring on to the further direction, the statements were examined by exploring each of the Guiding Principles by looking for good practice examples within User Experience Design. This was to relate to how the concepts can take form in digital product design.

DEMOCRATICALLY ACCESSIBLE

The users will have to access the service online, and be able to access and have an optimal user experience regardless of their technological facilities and skills.

ENABLE COLLABORATION

The format should encourage teams to work together on the innovation process, and be guided in a concrete and efficient way on what to do and how to do it.

PROVIDE LASTING MANIFESTATION

The manifestation of ideas and decisions should be easy to archive, and potentially share more broadly with the rest of the organisation.

PROMOTE CO-CREATION

The format should encourage teams to work together on it, in order to enable team collaboration in the most easy and democratic co-creational way possible.

REASSURED ABOUT THE RELEVANCE AND FEASIBILITY OF SUSTAINABLE CHANGE

The users should be able to utilise the resources adapted to the context of their reality and understand how to apply the ideas into their feasible reality.

SUPPORTED IN TAKING PART OF A LARGER MOVEMENT

The users should be inspired to see the possible impact and envision why to follow through on the incentive, beyond the tangible outcomes of the sustainable change.

Guiding principle: Physical Context

Democratically accessible

THIS COULD MEAN

- Formats must be universally usable for different teams using different systems
- Results and progress should be shareable at any stage of the process
- The site navigation should follow interaction design conventions and be easy to use and decode
- Should provide clear facilitation of the user journey in chronological order

EXAMPLE OF GOOD PRACTICE:

CASE STUDY / NOVOED PLATFORM CASE
THE FUTURE LEADERS PROGRAM / [NOVOED | YOUR COLLABORATIVE ONLINE LEARNING PLATFORM](#)

- Easy structured step-by-step chronological narration, with elements of gamification of the course is the e-learning platform NovoEd

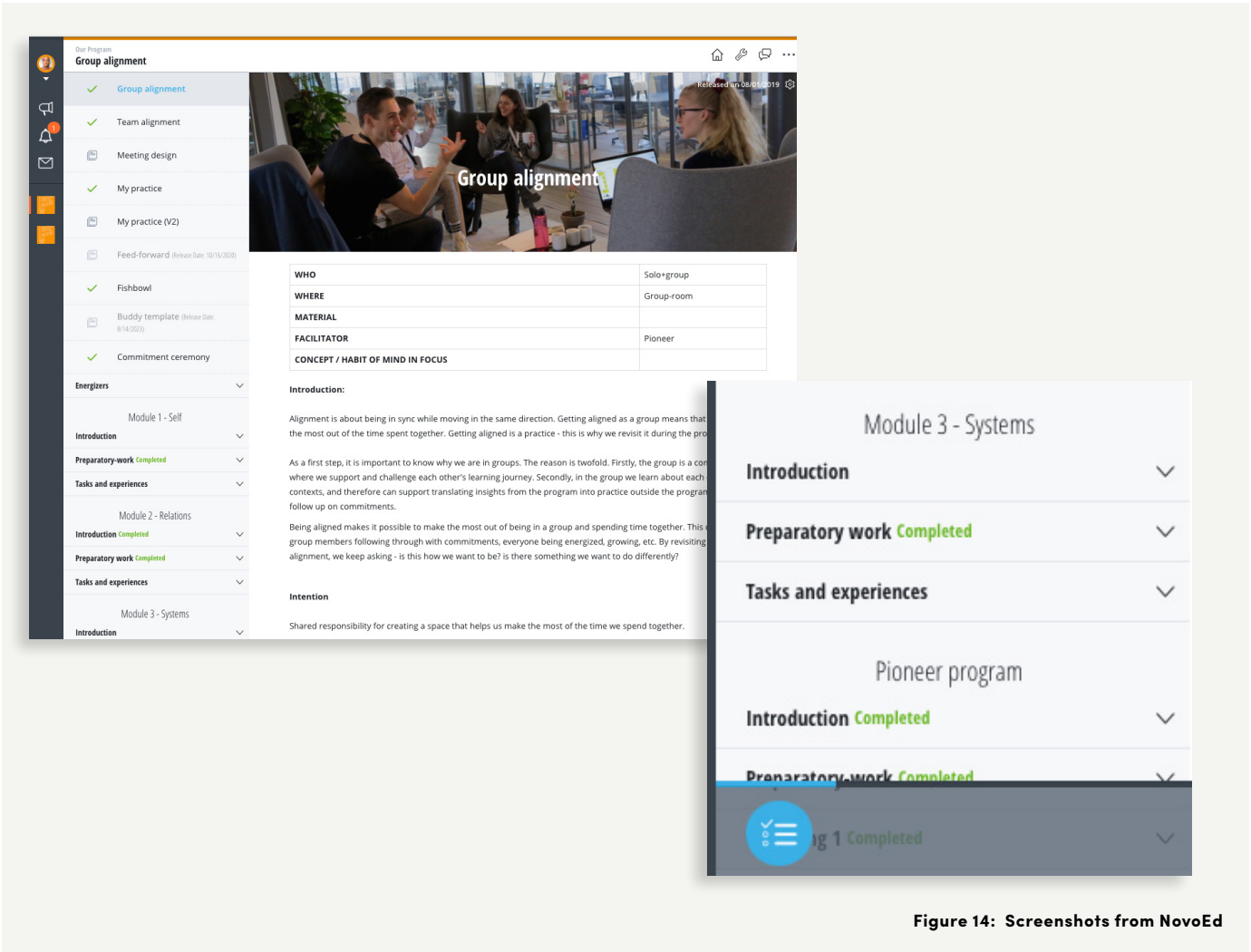


Figure 14: Screenshots from NovoEd

Guiding principle: Relational context

Enable collaboration

THIS COULD MEAN

- Results and progress should be shareable at any stage of the process
- There will be a need for clear and elaborate introductions and an interactive format of the “facilitator notes” on everything from time keeping, step by step task division, and how to capture results in the way.

EXAMPLE OF GOOD PRACTICE:

CASE STUDY / THE SPRINT “HOW IT WORKS”
STEP BY STEP FACILITATION RESOURCES

- Detailed facilitator guide with complete set of tutorials, resources and in depth role division such as “The Sprint Method” by Jake Knapp

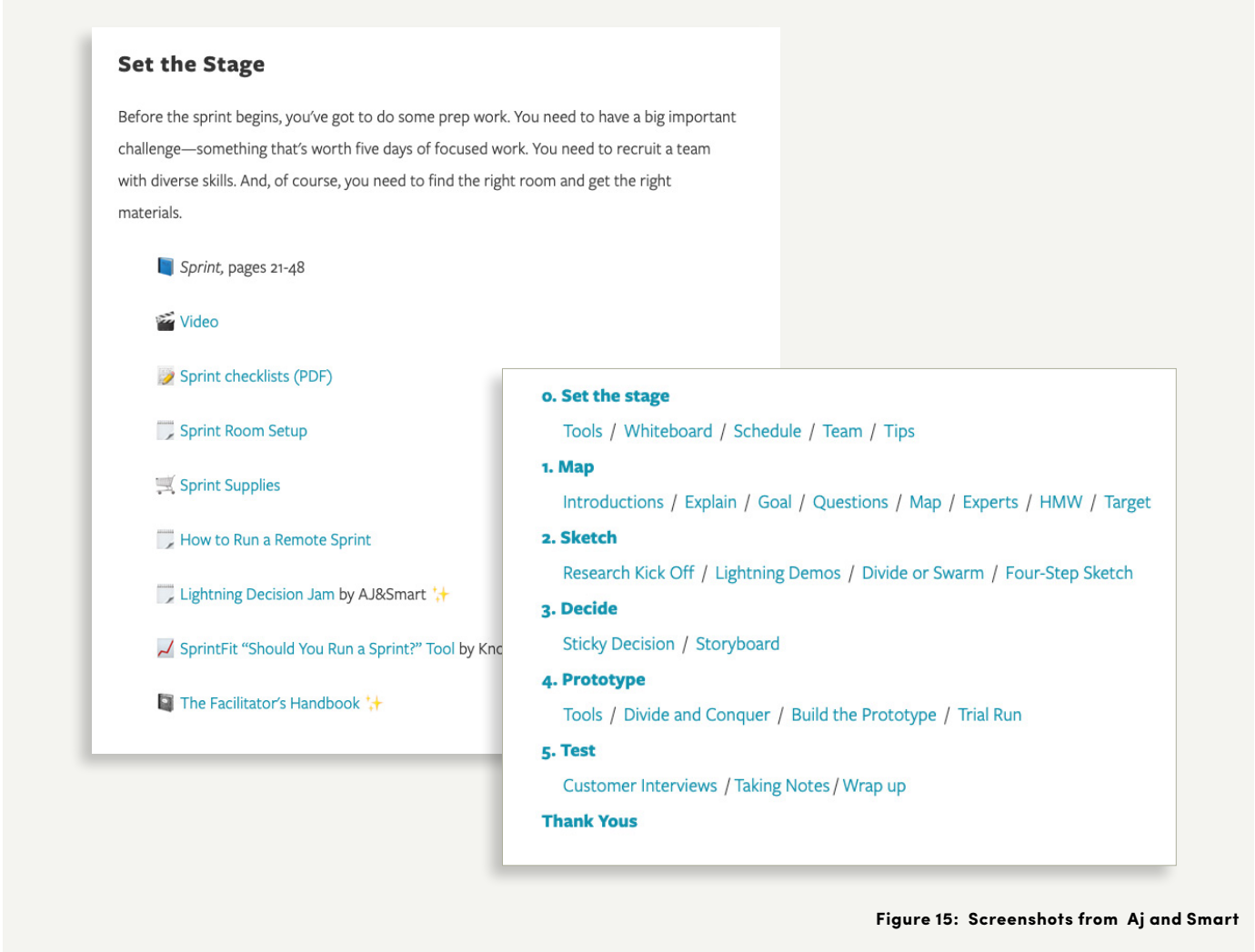


Figure 15: Screenshots from Aj and Smart

Guiding principle: Activities

Promote co-creation

THIS COULD MEAN

- Can provide resources in a dynamically shared format, ex such as PowerPoint or Google Slides templates
- Most traditional way could be printable PDF templates to print out and workshop around, yet this is not living up to a truly digital facilitation

EXAMPLE OF GOOD PRACTICE:

CASE STUDY / THE CIRCULAR DESIGN GUIDE
ASSET DOWNLOAD

- Most universally accessible case could be asset library by The Circular Design Guide where you can get templates making you fill in blanks, and presentations facilitating the process for you

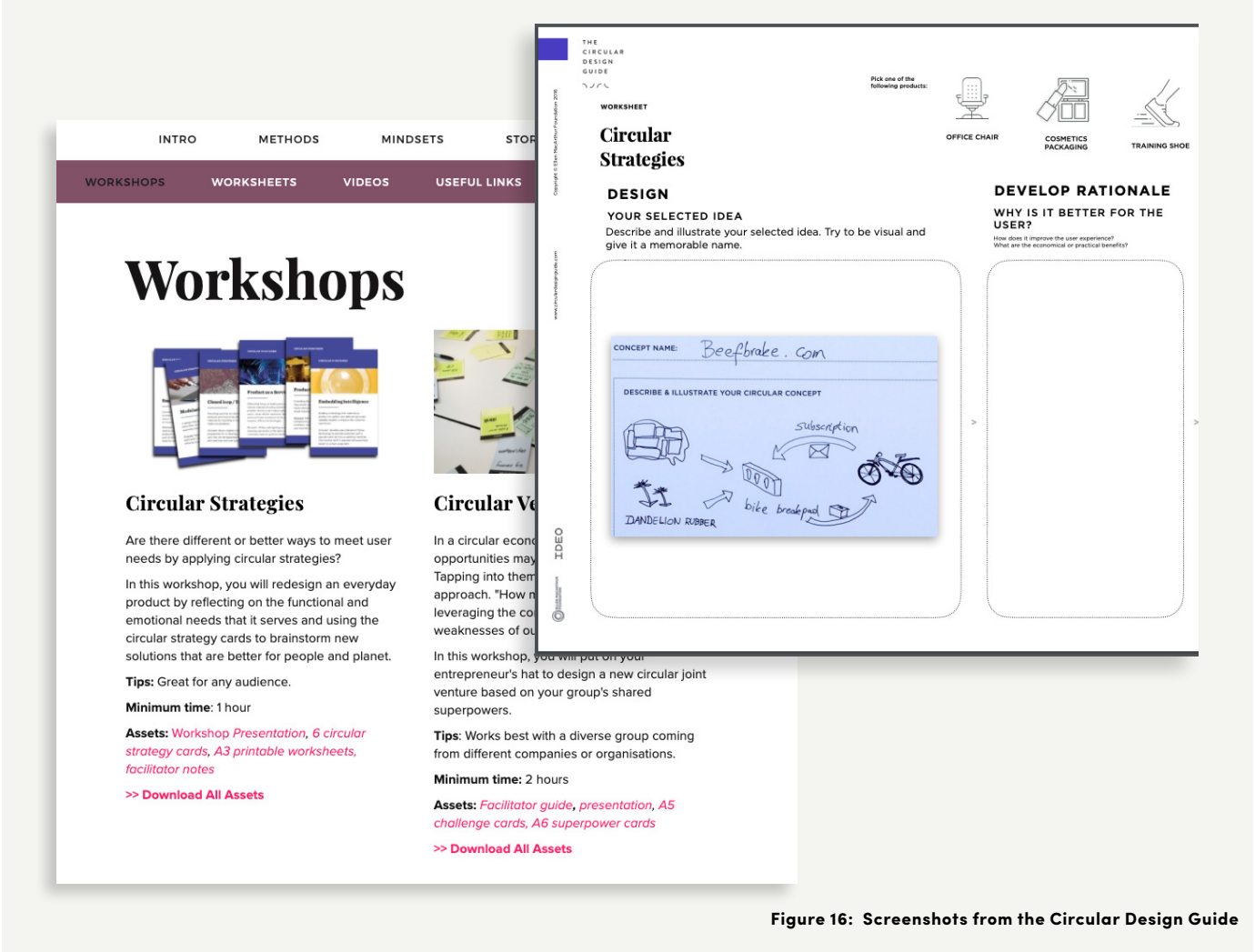


Figure 16: Screenshots from the Circular Design Guide

Guiding principle: Objects

Provide Lasting Manifestation

THIS COULD MEAN

- Can provide resources in a dynamically shared format.
- This could mean giving the organisations a shared community channel to share each of the 12 step progress.
- This means the end of the process will end in a short but concrete format, such as a pitch or an executive brief.
- Results and progress should be shareable at any stage of the process

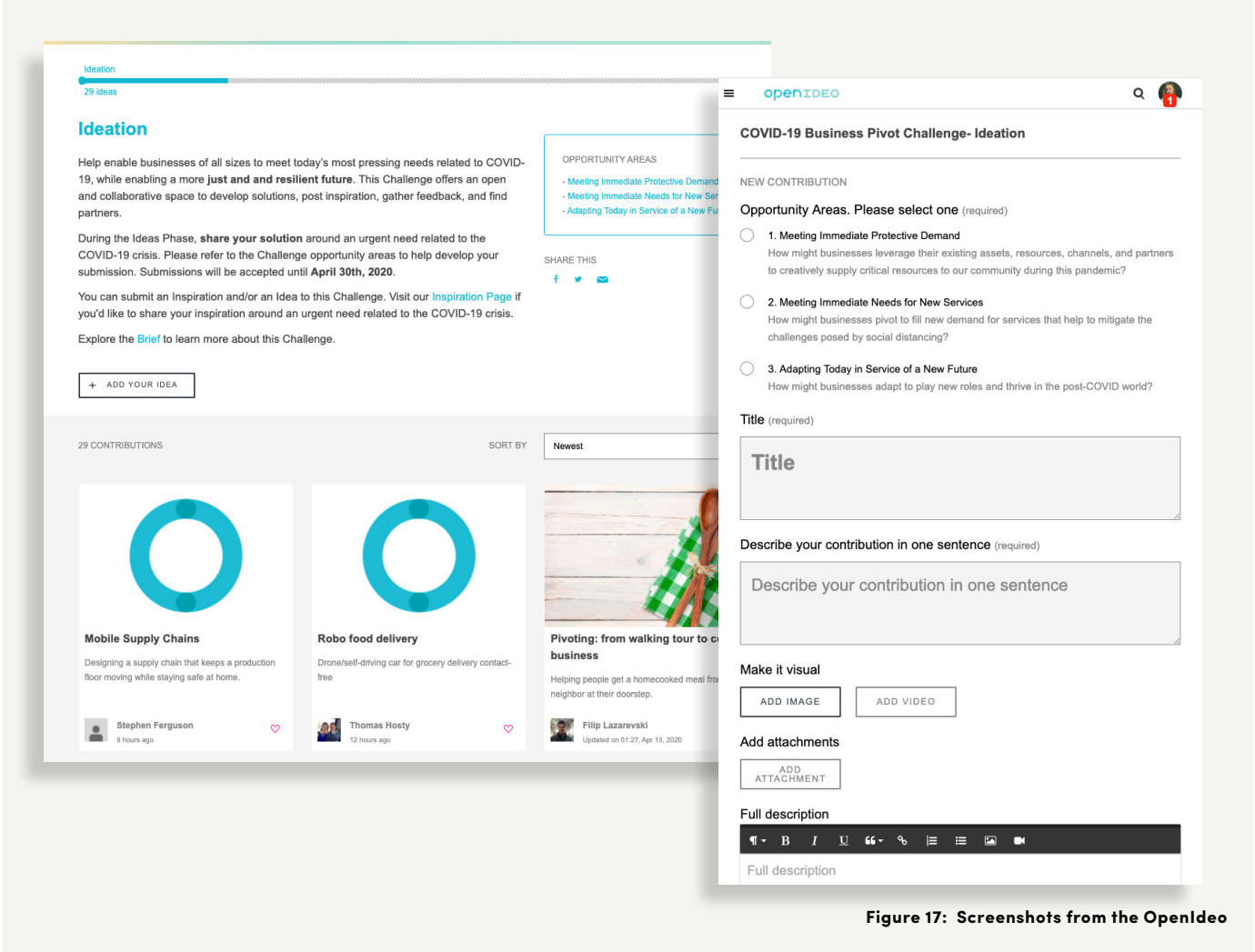


Figure 17: Screenshots from the OpenIdeo

EXAMPLE OF GOOD PRACTICE:

CASE STUDY / OPEN IDEO [IDEA BANK](#)

- The platform has a backtracking system and transparent process overview and democratic idea submission system. Idea and Inspiration submission templates giving structure to make any idea accessible.

Guiding principle: Rational goal

Reassured about the relevance and feasibility

THIS COULD MEAN

- Create a feeling of custom curation of the process could based on self assessment as the kick-off activity to ensure relevance
- Make a Certification for the company to create an incentive to complete
 - "Your certificate will be available here once you pass the course."
- Results and progress should be shareable at any stage of the process

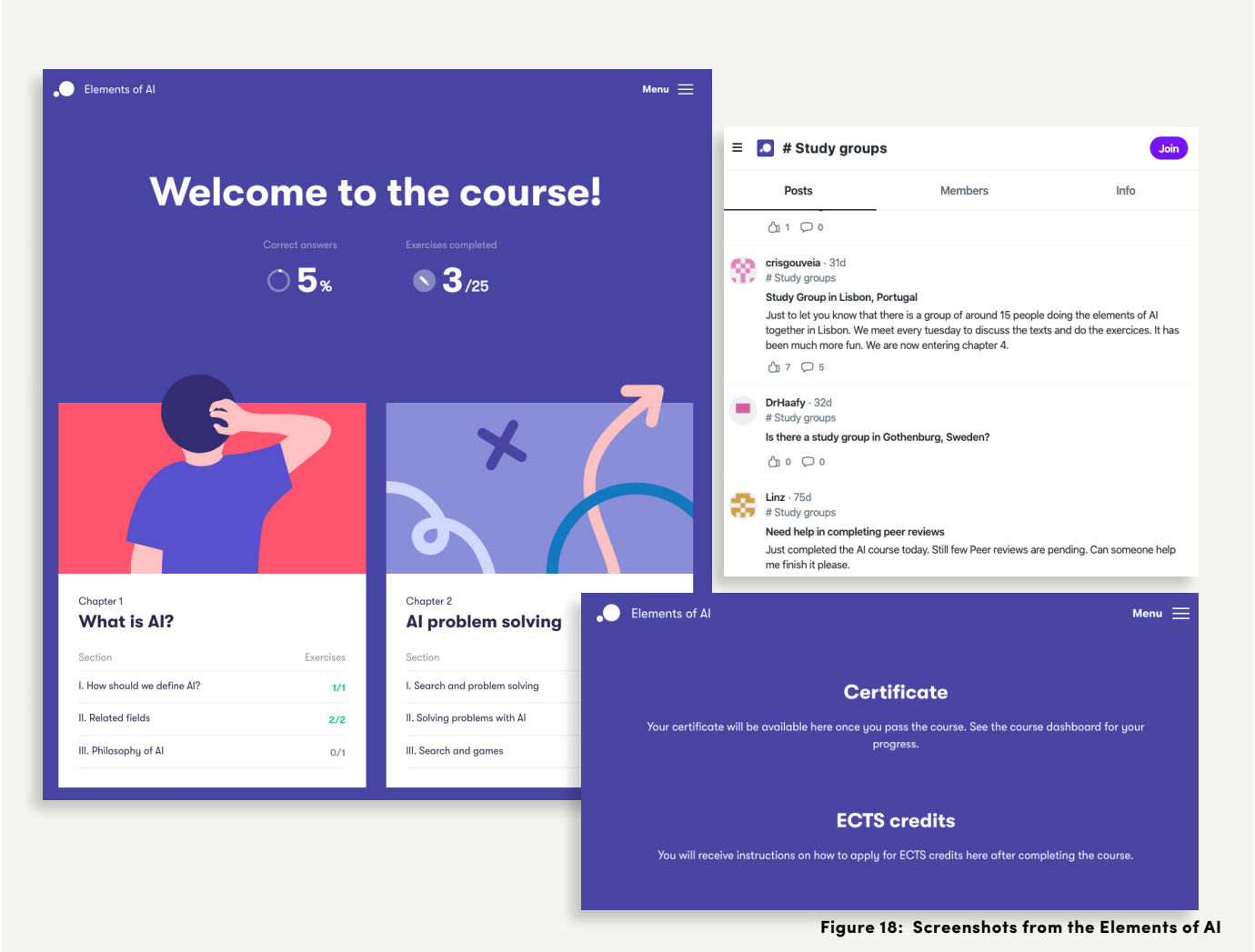


Figure 18: Screenshots from the Elements of AI

EXAMPLE OF GOOD PRACTICE:

CASE STUDY / [ELEMENTS OF AI](#)

- Elements of AI giving sense of authority and seriousness by giving opportunity to apply for ECTs points once the completed

Guiding principle: Emotional goal

Supported taking part of a larger movement

THIS COULD MEAN

- Could be a case library for inspiration of how to make sustainability become a tangible business asset
- Showcase others having implemented changes
- Offer a form of learning community
- Show examples of similar cases in the same industry

EXAMPLE OF GOOD PRACTICE:

CASE STUDY / CIRCULAR DESIGN GUIDE

- Circular Design Guide “Open To All” liveclasses offering webinar series on circularity with live chat with 1200 other viewers on Zoom

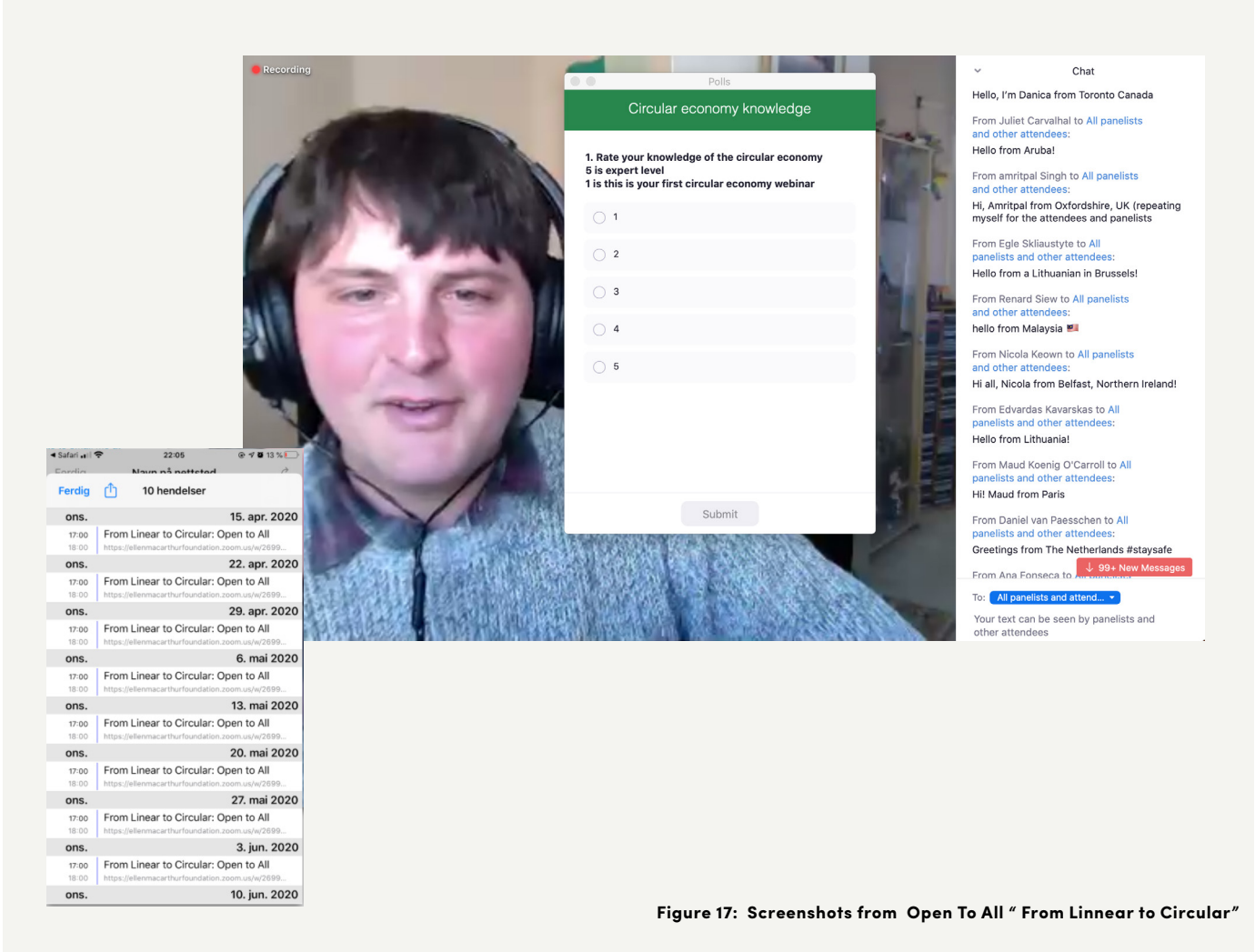


Figure 17: Screenshots from Open To All “ From Linnear to Circular”

Takeaways on Learning Journey Tendencies

After exploring good practice case studies of digital toolkits, it seems to be two main tendencies within these different digital learning journeys. The two main purposes spotted, was one being for the purpose of the knowledge transfer and the other purposed for being method and process mediating.

Some of the toolkit providers are offering step-by-step curriculum where you should gradually gain deeper knowledge on a topic, and the learning is facilitated by giving you correction and feedback if you choose the wrong factual answer.

The other purpose is learning people how to use their methods, where the provides the facilitation as step by step “fill in the blanks”. These toolkit providers, are in various degrees inviting you to learn their methodologies, as the aim to be to invite the participants to learn about the methods, mindsets and philosophies that lies behind the step-by-step work.

A common way both purposes work with digital facilitation and remote collaboration can be to set up digital gatherings, encourage peer-to-peer feedback, or promote collaboration in the form of facilitating community groups and forums linking people with similar interests.

DEVELOP

Moving forward after carefully defining the Design Requirements and Guiding Principles, the next phase was Develop and Ideation phase in the Double Diamond process. (Design Council, 2015)

The Develop phase in The Double Diamond process is the stage to open up for the second loop of Divergent thinking, meaning we will work with the aim of ideating numerous options and exploring concepts without judging them till the end.

“One of the main features of service design thinking is that this approach is not about avoiding mistakes, but rather to explore as many possible mistakes” (Stickdorn & Schneider, 2011)

According to De Bonos view on efficient problem solving, this is the stage in the APC Method (De Bono, 2018), as a lens to view a problem with the scope of Alternatives, Possibilities, and Choices, and at this stage we need to produce sufficient Possibilities, as his research emphasises, that when we have difficulties in making decisions it can stem from a failure to produce sufficient alternatives.

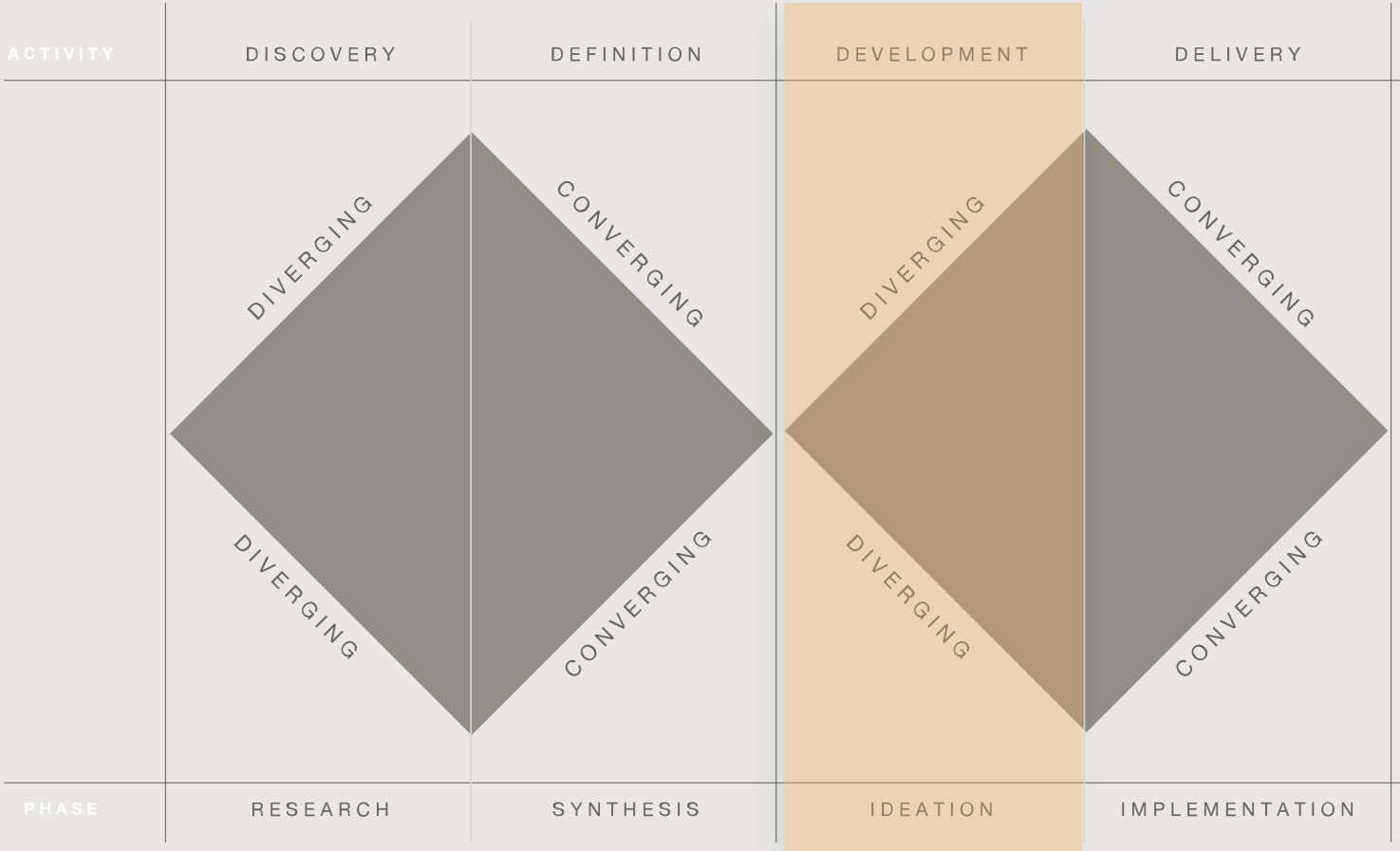
The end of the Define phase was wrapped up with design requirements serving as six guiding principles and open-ended questions on what they might look like as a part of a digital facilitator, and this was setting the direction for the further ideation on the Digital Facilitator, and what it should be created keeping all principles in mind.

Ending the Define phase, we bring along the crux to be working on, and let that lead the direction for the ideation, while taking into consideration trends regarding the challenge statement: *“We really need to figure out how to make a platform fit to facilitate and motivate across differences in the businesses challenges, ambitions and commitment levels to the processes.”*

The focus is to create concept ideas, design and explore multiple ideas, so we can be sure to have chosen the most suitable path, and can be developing the service in order to make a coherent and relevant user journey. We need to explore all angles of Digital Facilitation that the research gave us up until now. The process is iterative and should avoid going into judgement and filtering too early.

This chapter also zooms in on state of the art behavioural science, and takes into consideration how this should be incorporated to the ideation.

Process overview



Exploration in the Develop phase

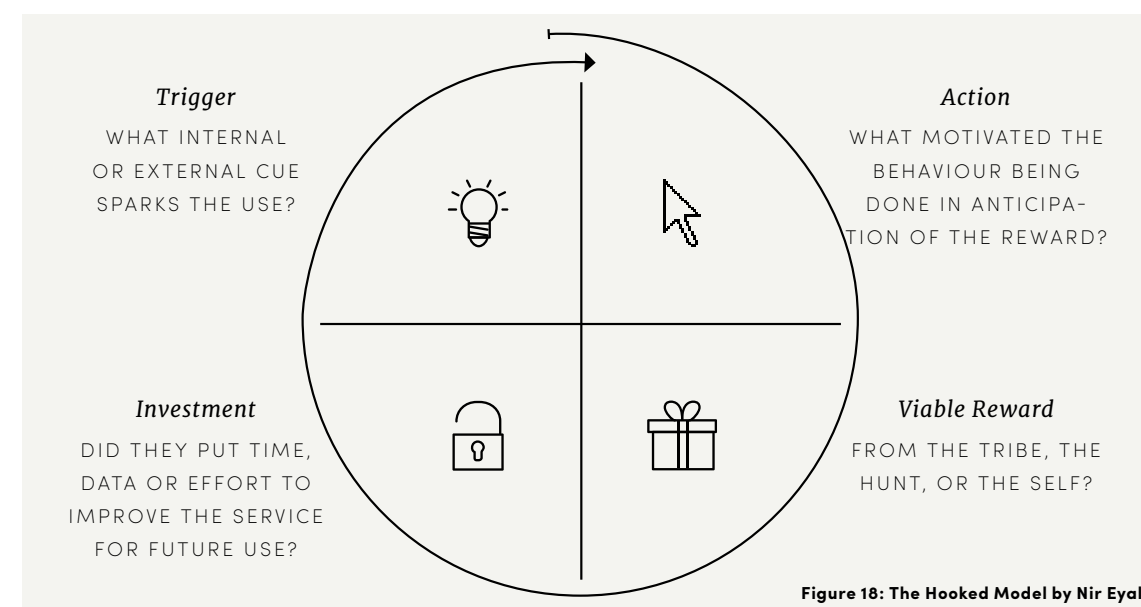


Designing An Engaging User Experience

Being in the development of concrete and detailed ideas for how the course should engage and motivate the participants, I looked back at the behaviour science, and incorporated the findings from literature on psychological design hacks that could help enhance the desired behaviour.

While developing the details of the User Experience, a framework is used to structure the considerations behind each separate step of the User Journey, as we are aiming for highest possible desirability. This framework is known as “The Hooked Model.” (Eyal & Hoover, 2014) The framework is using the principles of “The Hooked Model” by Nir Eyal, (2014), this is viewing step on the User Journey with the scopes of what “Trigger”, “Action”, “Viable reward” and “Investment”, that makes the foundation of use, frequency and ultimately will sum up how the users are experiencing the service.

The knowledge from Eyal's book on his model, created the basis for the further considerations, on how to develop an engaging user experience. The mechanisms were investigated even more in details, by looking at the work of the behaviour designer, Lucas Didier on “Psychological principles applied to product design - Using cognitive biases and persuasive patterns to build better products”, (Didier, 2020)



FROM TRIGGER TO ACTION

The Trigger can be internal or externally motivated, but in this case when building a platform for a digital course, it will most likely be external triggers embedded with information telling the user what to do next. The action is where the user takes the trigger, and acts upon it. If the user is to take the trigger, and go into the action phase, there is a crucial condition that must be present, sufficient motivation.

Eyal then describes how we then need the ability to complete the desired outcome, and the trigger must always be present to activate the behaviour. He refers to the many results of research that showed that it is very important that the technology in use is at a fidelity that as many as possible will have the ability to take action on the trigger. The easier the better, and as simple a process to achieve the goal as possible, the higher completion rate. (Eyal & Hoover, 2014) This is also related to what Didier labels, “The Principle of Sequencing”, where research shows that when we have a complex flow of tasks ahead, we are more likely to take action and complete a complex task, if it is broken into smaller tasks for us (Didier, 2020).

VIABLE REWARD

The perceived viable reward is important and according to Eyal, represents the three types of deep needs we have as humans, that will release dopamine in our brains. The categories of reward being the reward of The Tribe, The Hunt and The Self. He emphasises that, *“Only by understanding what truly matters to users can a company correctly match the right viable reward to their intended behaviour”* (Eyal & Hoover, 2014).

In a service wanting to transfer a process and build a community, we want to promote learning and growth in a group, this makes it especially important to understand “The reward of the tribe”, as this is the one that is what makes us feel accepted, important and included, and is the need for social reinforcement. If the triggers are promoting taking part of an activ-

ity with others. According to Didier, making something into a “Periodic Event” where we know we need to take part simultaneously with others, can be a powerful way to engage and create retention to the service or product, and will lead to a more engaged group, as it will be easier to follow up if they are turned into a periodic event with a set sequence between, as this can help the users feel a sustained interest, and create a sense of belonging (Didier, 2020).

This affects how we spend our time, and can explain how we use social media to feel the social rewards on a viable schedule, and keeps us coming back over and over again. To leverage the social learning theory, and *“People seeing others being awarded for a behaviour will be likely to alter their own beliefs and subsequent actions...Showed that this technique works particularly well when people observe the behaviour of people most like themselves, or those who are slightly more experienced.”* (Eyal & Hoover, 2014)

INVESTMENT

The last phase Eyal is referring to in The Hooked Model, is the phase of Investment. This refers to the research that suggests that with the escalation of commitment leads and labour, leads to love (Eyal & Hoover, 2014). The more effort and time users give to a service, the more they value it. In technology the investment can also be content, data, and skills. The stored value is then the factor increasing our retention and how likely it is we will return to use it again. The content we add as users of a service, will make our ties stronger. Archive functions will make us treasure this collection. Data can be collected by actively or passively having users adding data about themselves and their behaviours. The skills we invest can be linked to the time we spent to learn to use a new service. Designing a service so that the user will have to put in a “bit of work”, can therefore have a powerful effect on how likely they will be to re-enter.

Leveraging Behavioural Science in Ideation

Based on the Design Requirements, for the Experience Design and the crux of the challenge, being “*How to make a platform fit to facilitate and motivate across differences in the businesses challenges, ambitions and commitment levels to the processes?*”, it can be useful to explore existing research on behavioural biases and commonly known mechanisms found in Behaviour Science.

Structuring the analysis on matching biases with takeaways and potential challenges to be aware of, in the further idea development. This can be helpful while designing the User Experience, while using the knowledge of “Deep Service Design Thinking – Integrating Service Design Thinking and Motivational Psychology,” a chapter in This Is Service Design Thinking written by Fergus Bisset, (Stickdorn & Schneider, 2011) where Bisset suggests that Service Designers can benefit from using the psychological literature while approaching complex human behaviour, social and ecological design problems. Bisset states that looking at motivation and engagement can be helpful while planning for service design journey mapping and journey visualisations. He argues that adding the layer of motivation to the journey mapping, as he calls “engagement mapping”, will help service designers while trying to anticipate how and when motivating and demotivating events will occur within a service encounter, and also how they will impact on the overall user-service experience.

BIAS ANALYSIS AND OPPORTUNITY SPOTTING

Based on the research found in the book, “*Nudge – Improving Decisions About Health, Wealth and Happiness*”, by Richard H Thaler and Cass R Sunstein, they collected studies and research of biases and mechanisms affecting our behaviour. The following analysis is looking at a selection of them, and reflecting on how they can impact users considerations, and hereby how we interact with services and products.

1. THE PARADOX OF CHOICE

Psychologists point to the field in behaviour science called “The Paradox of Choice”. Most people don’t want more options, they just want what they want. (Thaler & Sunsten, 2009) If we are overwhelmed by options, we end up not being able to choose at all.

If we hesitate to choose out of fear that something better or more suitable will come up, this leads us to hold back from making any choice and get to it at all. It is particularly hard for people to make a good decision when they have trouble translating the choice they face into the experiences they will have.

TAKEAWAYS

We might make people unable to choose if we give too many paths and options to make choices from, unless we clearly indicate what experience they will have.

CHALLENGES

– *How can we make the funnelling as easy and delightful, while avoiding overwhelming the users?*

2. STRUCTURING COMPLEX CHOICES

The size and complexity of the available options make humans use different strategies. The go-to strategies we resort to, tend to depend on the available options. If we have a small number of well-understood alternatives, we examine them closely and pay attention to all the attributes and make trade-offs. If the choices get too many, we use alternative strategies, that is typically where people get into trouble, and feel unable to select a path. (Thaler & Sunsten, 2009)

If there are numerous choices, we need to provide a well-orchestrated structure, and this structure will affect the outcomes. Here designers or the choice architects might help by providing “collaborative filtering”, where we try to help to solve the problem, by clustering likely appealing alternatives.

TAKEAWAYS

We need to provide a well-orchestrated structure, but be aware that this structure will affect the outcomes.

CHALLENGES

– *How to utilise filter options wisely, to provide the most suitable process for the context of the company?*

– *Can we design the system so that we prompt choices to be ambitious and sustainably impactful?*

3. CONFORMITY BIAS AND COLLECTIVE CONSERVATISM

Another phenomenon in behaviour science, that might be holding individuals back from making sustainable changes happen in companies, is that people tend to ignore their evidence and disregard their own sense of the world when being a part of a group. One big reason for this can be that we don't wish to face disapproval from the group, so rather than standing out from the herd, we tend to doubt our own perceptions and resonate that it is us that must have been getting it wrong. (Thaler & Sunsten, 2009)

This is what is described as "Conformity bias", that plays out as an wipe-out of opinions, where if everyone in the room accepts a certain proposition and settles for that (Thaler & Sunsten, 2009). However, one way to break away from conformity is when participants are asked to give anonymous answers. This way participants have less at stake, as they do not risk other people seeing what they think. Individuals are also more likely to act by conformity when they are placed in small groups, and then asked to share in public. Here all individual opinions will quickly converge into the group norm, and reinforce the consensus and conformity bias.

The studies showed that many groups in experiments also fall into patterns where the initial judgements, for example in a workplace, can follow the group for generations. Even if the person who was originally responsible has been gone for a long time, groups still tend to carry the inherited traditions with them. This phenomenon is called "Collective Conservatism", and describes what happens when groups stick to the established patterns even if new needs arise. This makes traditions last for a long time, and receive support from a large group of people, even if it was the product of a opinions

from a few people or even just one.

TAKEAWAYS

It can be hard to encourage innovative ideas to create change, when all we want to be doing is what others on the team are doing.

CHALLENGES

– *How to encourage diverse ideas, without making people have to defend their views publicly across work hierarchies?*

4. LOSS AVERSION AND THE STATUS QUO BIAS IS BLOCKING CHANGE

It can be a great challenge to make humans risk to make a change, and reinvent their position in the world, because we have what we have, and don't know what we might get. "Loss Aversion" is creating interia, meaning a strong desire to stick with the current holdings, as we do not want to give up what we have already because of the risk we might end up with less. This is called loss aversion. Another reason for interia, is our tendency to stick with what we already have in our current situation, and this is what is called the status quo bias (Thaler & Sunsten, 2009). Helping companies go into a sustainable transformation, will involve several layers of stakeholders and employees who have to re-examine their organisation and look for rooms for improvement. These individuals might have "Loss Aversion" and be affected by the "Status Quo" bias.

TAKEAWAYS

Resistance to change is instinctively strong and we like to stick to what we already have, also related to our business models.

CHALLENGES

– *How can we help teams unite to imagine an alternative future state of their company?*

5. SOCIAL CONTAGION

Nudging people to shift behaviour is proven to be easier if we are informing people what other people are doing. Individuals are far more likely to do what others have done before them. This is also the bias UX designers try to leverage, when they want to implement ways to show social proof. The social influence changes our perception of what we want to be doing and our judgement of how significant and good we interpret something to be.

This tendency is found in every field of life, about political choices, eating habits and where we invest money. We mirror the peers and reference groups we have around us. Sometimes there are great benefits of following our herd, but sometimes it can lead us into serious trouble. The social contagion shadow side is when the public opinion is lacking evidence or proof, but it still can lead us into non-useful feedback loops that will influence a chain of "evidence" (Thaler & Sunsten, 2009).

TAKEAWAYS

Numbers, (if high hence persuasive), can create incentive to start something new, if we see that others are doing it. Showcases and inspiration from other companies we perceive as peers, examples of how others have done it, might attract more companies to invest time and resources needed.

CHALLENGES

– *How to display only aspirational and context aware examples? To a micro team, a story of how a giant organisation implemented change might lead to division rather than action mindedness.*

6. ENHANCING SOCIALLY DESIRABLE BEHAVIOUR

Learning is most likely to happen if people get immediate, clear feedback after each try. The best way to help humans improve their performance is to provide feedback. Well designed systems tell people when they are doing well, and when they make mistakes, as it is happening.

If we are informed what the compliance level is, we become more likely to cheat, and this follows both desirable and undesirable behaviour, and can be increased by drawing public attention to what others are doing. This has been proven in studies where people are faced with how much electricity other households in their zip code were using around them. The study also refers to the fact that if we show accurate knowledge on how one performs related to others, the findings were that if you are an above-average consumer, seeing the numbers will make you significantly decrease your consumption in the period following the period, but if you, on the other hand, is a below-average consumer, they raised their consumption significantly (Thaler & Sunsten, 2009). This suggests that sometimes it's better to avoid letting people know if they are better than the social norm.

TAKEAWAYS

People will strive to do better if they are below the average norm and learn the most if they get immediate feedback.

CHALLENGES

– *How to give feedback, and use social proof to motivate people undergoing the process?*

Ideation

THE LOTUS BLOSSOM METHOD

This method is used freely based on The Service Design toolkit, (Service Design Toolkit, 2011) and is evolved around the design requirements. The design requirements were centre for each blossom, making it an exercise with six sessions of ideation. The initial requirements were then moved out to a cluster of their own and added eighth ideas per requirement. This is a way to rapidly generate a lot of ideas. With the six official Guiding Design Requirements making the basis of one new “Idea Blossom”, allowed 48 ideas to be effectively generated within one working day.

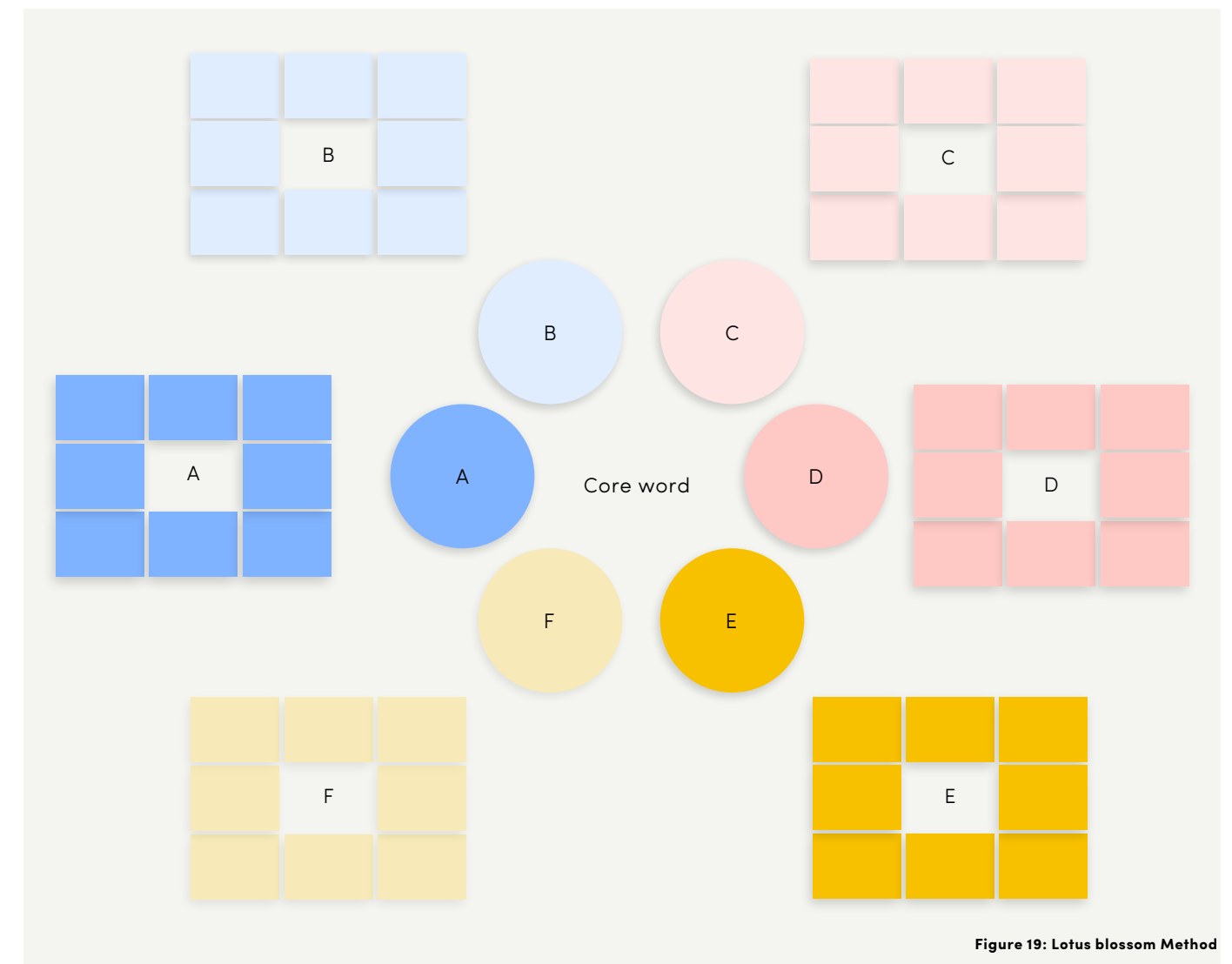
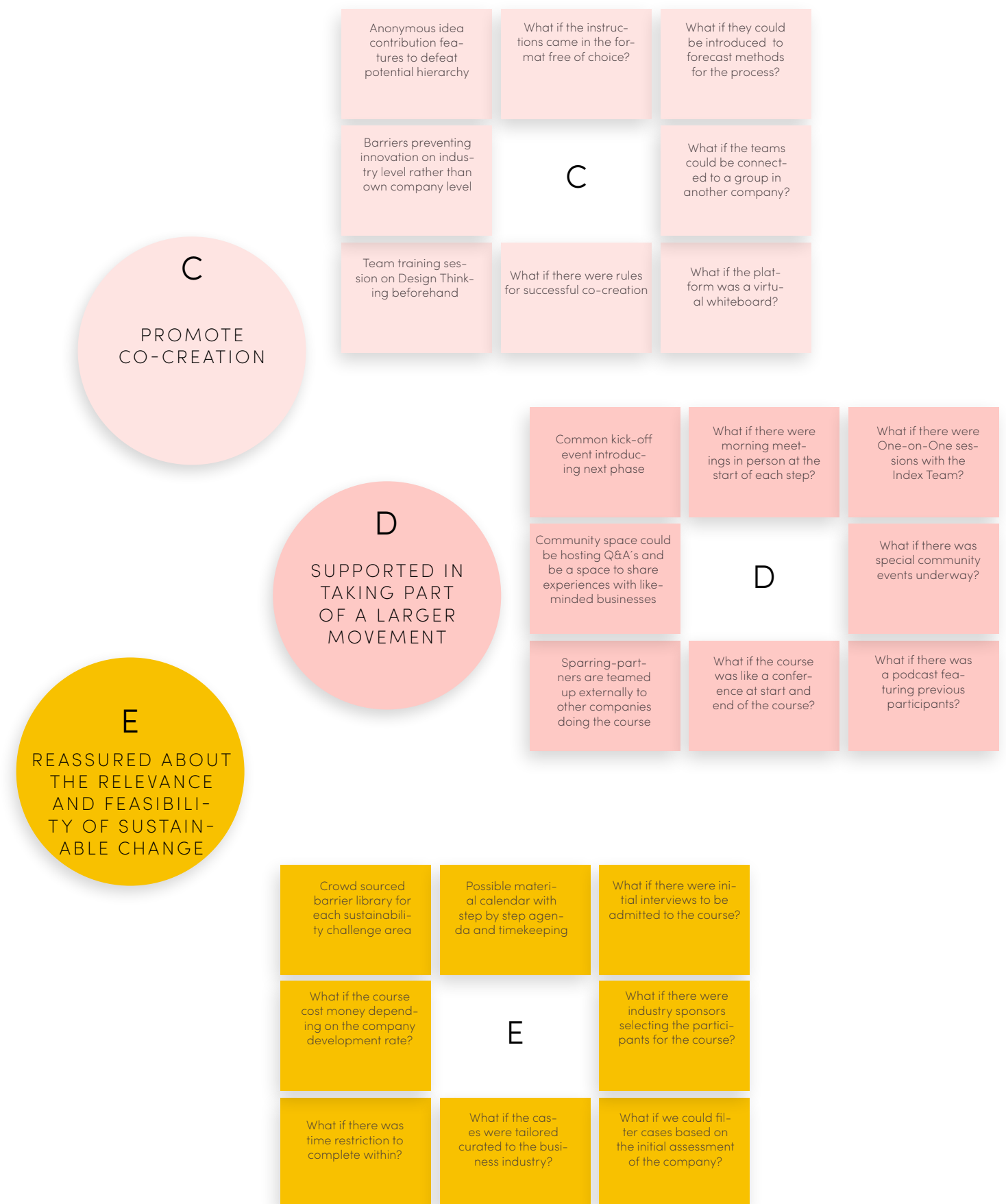
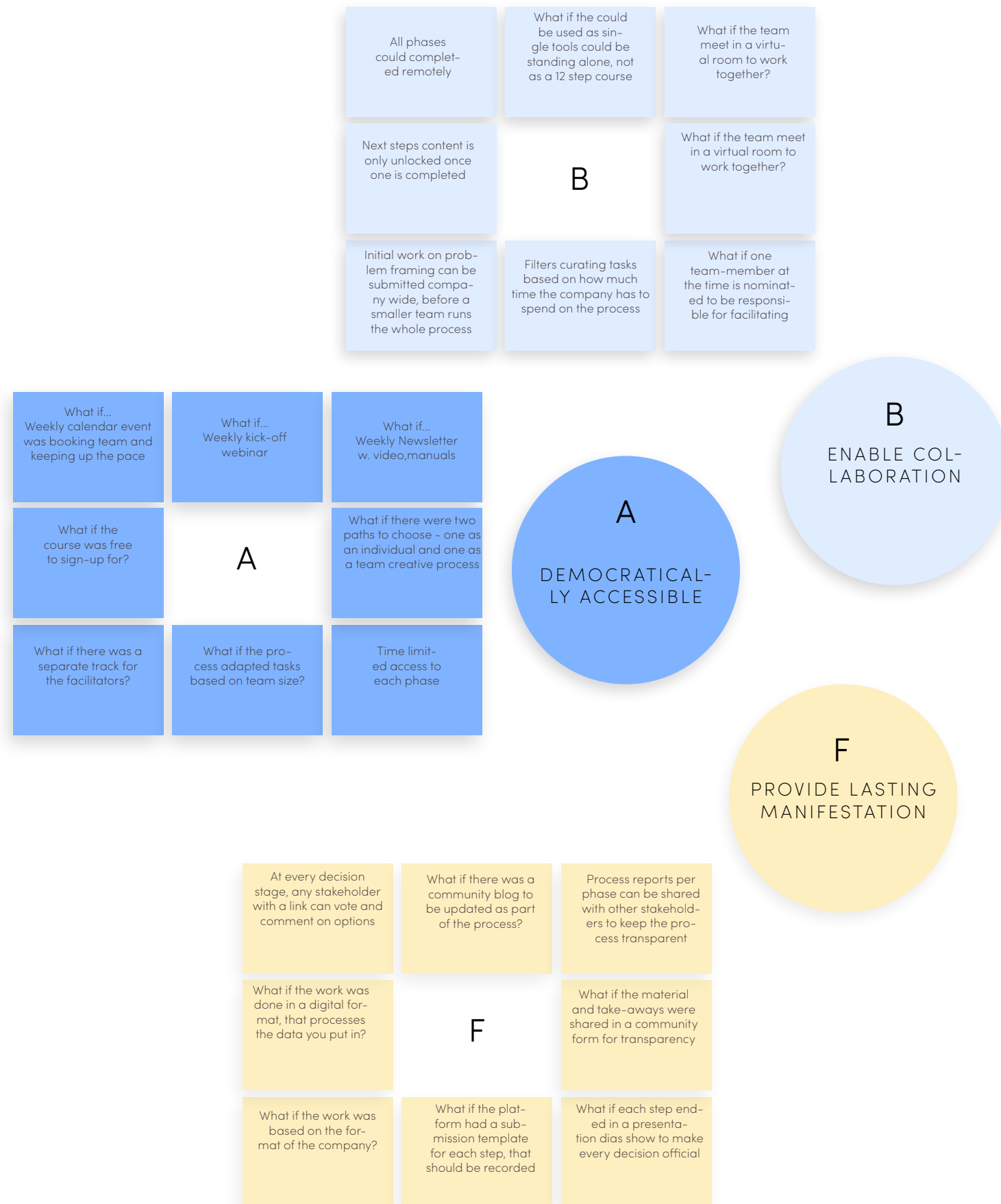


Figure 19: Lotus blossom Method

Idea generation



GENERATING IDEAS

The challenges spotted in “Bias analysis and opportunity spotting” were used as prompts to spark the ideation. The ideas were generated using the challenges and opportunities, while keeping in mind the theories of the four lenses of The Hooked Model, making ideas attempting to create a feeling of belonging and togetherness despite taking place digitally, while trying to accommodate the specific design principles. The ideas were first framed as “What if”- sentences, then clustered and rewritten in order to make the idea clear so that a person standing on the outside could decode them without too much background knowledge of the project. The “What if” method (De Bono, 2018) can typically be used when looking for an efficient way to view a matter in a different light and help formulate an idea or concept.

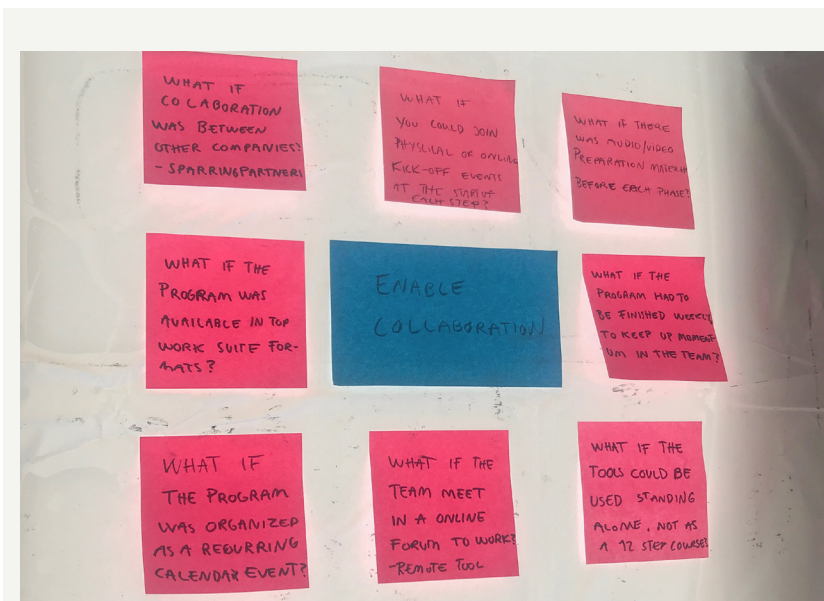


Figure 20: Example of a design requirement at heart of a lotus blossom

SELECTING IDEAS TO TEST

As a result of the Lotus Blossom ideation session, a wide variety of options for the idea bank were generated. This in turn formed the basis for further concept development and design. The ideas were then clustered by using value mapping in order to achieve a good base for a later planned “Idea Prioritisation” workshop, that was conducted with two external companies.

Idea Bank

Time limited access to each phase

Next steps content is only unlocked once one is completed

One team-member could do a facilitator training program to be capable of leading the group at the workplace

At every decision stage, any stakeholder with a link can vote and comment on options

Anonymous idea contribution features to defeat potential hierarchy

Team training session on creative process rules for successful co-creation

Possible calendar with step by step agenda and timekeeping

Common kick-off event introducing next phase

Weekly calendar event booking team and keeping up the pace

Community space could be hosting Q&A's and be a space to share experiences with likeminded businesses

Sparring-partners are teamed up externally to other companies doing the course

Crowd sourced barrier library for each sustainability challenge area

Upon completion the company is given a diploma / certification

One team-member at the time is nominated to be responsible for facilitating

All phases should be possible to collaborate on remotely

Barriers preventing innovation on industry level rather than own company level

Process reports per phase can be shared with other stakeholders to keep the process transparent

Initial work on problem framing can be submitted company wide, before a smaller team runs the whole process

Weekly kick-off webinar

Weekly Newsletter w. video, manuals and material

Filters curating tasks based on how much time the company has to spend on the process

Figure 21: The ideas for testing in the workshop

Idea prioritization & Concept testing workshops

SEE ALL TASKS AND RESULTS IN APPENDIX #11

The purpose of the workshop was to use the ideas from the ideation as a starting point to understand the target groups opinions. The workshop made use of Guided Storytelling and Card Sorting, rounding up with an invitation to co-create ideas and come with input for the service. The workshop was facilitated by me, while two observers from Index were present to ensure that we captured the essence.

“POSSIBLE PAIN POINT SCENARIOS”

The participant was presented with two “Possible Pain Point scenarios”, and then asked to elaborate on how the scenario resonated with their experience in their workplace and how they would tackle such issues. The scenarios was inspired by the technique of Guided Storytelling, (Curedale, 2018) where the participant is invited to walk us through a scenario of a possible pain point, and then asked to describe experiences and thoughts around the topic.

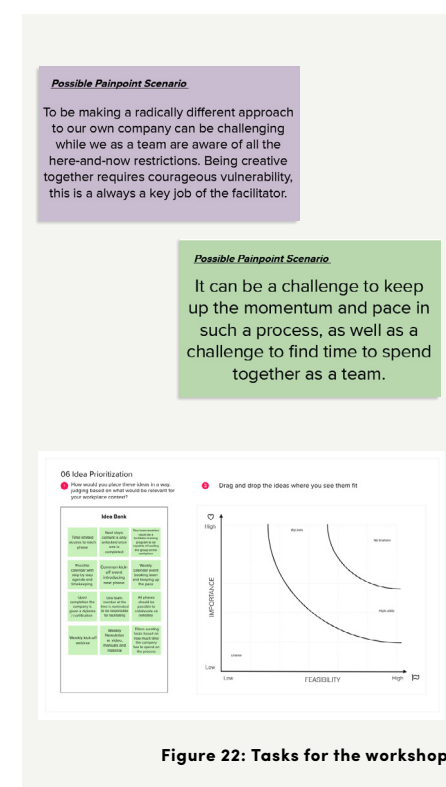
IDEA EVALUATION MATRIX

The second part of this exercise was a form of idea Card Sorting, using an Evaluation Matrix to assess the viability of each idea presented to the participant. The Evaluation Matrix is known from Lean UX practices, and was inspired by the exercise called Prioritization Grid used in the IBM Enterprise Design Thinking as well as the IBM Field Guide. (Johnson, 2016). The method is useful when we need to weigh different ideas up against each other, and the measures used were “Importance” and “Feasibility”.

After hearing about each idea, the participant was then asked to sort the ideas by dragging into the matrix. The participant was asked to place all the ideas where they saw them fit, while explaining their thoughts. This exercise was done in order to determine the developing direction of the concept, see patterns and hear the reflections on each concept and how they would see the ideas benefits and limitations in a workplace like theirs.

FEEDBACK GRID

The session ended up with a feedback grid, to get a sum up impression of how the participant thought the idea prioritization went, and allow a moment to capture any other remarks that we did not directly ask about during the workshop tasks. The method is a matrix with the quadrants “Worked well”, “Needs to change”, “Unanswered questions”, “New Ideas To Try”. (Feedback Grid Toolkit Activity - Enterprise Design Thinking, n.d.)



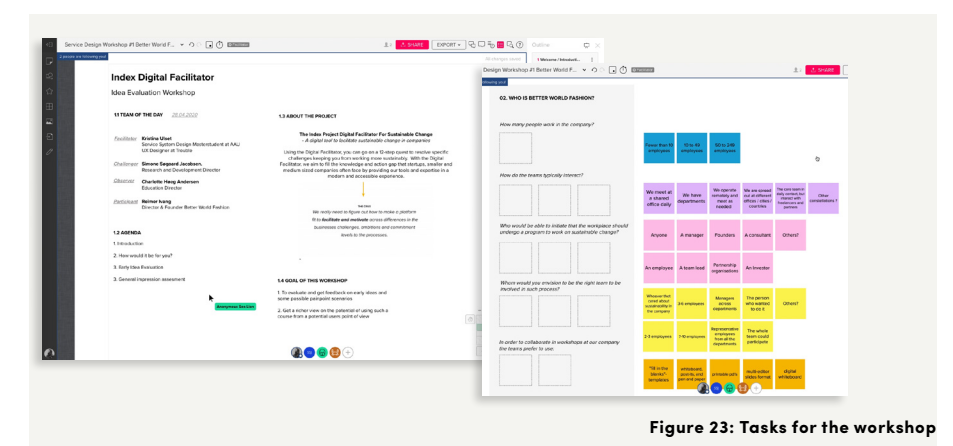
ABOUT THE PARTICIPANTS

The workshop was booked with participants within The Index Projects network, and scheduled months before the session took place. There were initially four companies within the SME sector in Denmark that had agreed to join the workshop.

On the week of the meeting taking place, two of the companies cancelled the workshop, due to more urgent matters to attend to in the COVID-19 circumstances. This could not have been anticipated when they agreed to spend time to help in February.

This led to the workshop being conducted with two of the companies, although they are both solid and aspirational cases, as both companies are known for working with outstanding results and being awarded and certified because of their efforts within sustainability in business transformation.

The workshop was also conducted with two other companies, but the data was not used, as the validity of these companies was weaker, as it was not Danish SME's, and it was conducted with people in less influential positions, therefore due to further reflections I concluded that made it incomparable datasets.



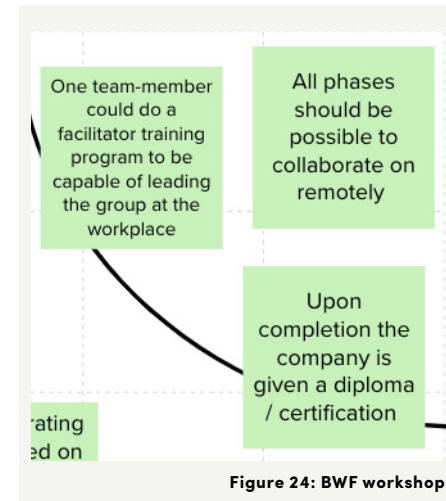
Unpacking of Workshops

SEE ALL RESULTS IN APPENDIX #11

BETTER WORLD FASHION (BWF) / ABOUT THE COMPANY

Reimer is the first in Denmark to achieve gold B-Corp certification for their cyclical business model in Denmark. He is an expert in digital transformation, and has a background in academia, but founded a circular fashion brand in 2015. BWF has less than 10 people working together. Most team members meet at the office, but they also currently have associated freelancers in Portugal and Aruba, as well as all production taking place in Poland. Some are permanently remote, and the core team are in daily contact.

The founder imagined a manager or founders would be the ones able to initiate such a big transformation in the company, and they would gather 2-3 employees representing employees from every department. They prefer to meet in person and have a less formal structure on a whiteboard, but as the state of the world they would like to use a digital whiteboard to achieve the same results.



He placed all ideas relating to having the digital facilitator time manage, unlock once completed, and show step by step what to do, low as he saw the facilitator too closely monitoring the process, and therefore ranked the facilitator at low importance and low feasibility.

He liked the ideas relating to educating one person to take the lead locally the best. He found the idea that one person is directly in contact with Index and being educated to be ready, and even awarded with a certificate, as the best one, and found it important that this could be done remotely, without any physical meetings necessarily.

PLACEMENT OF THE SECOND SET OF IDEAS

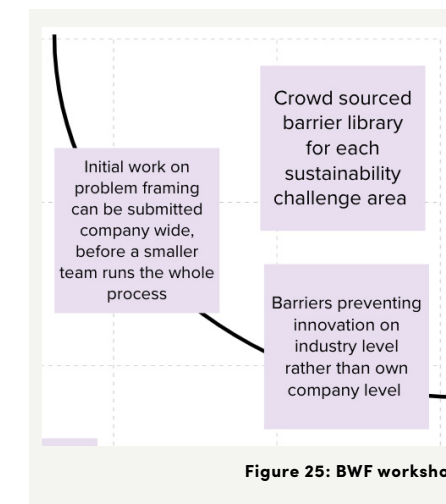
He emphasised that Sustainable imagination capacity is a new skill that needs to be taught. We need a bigger library opening the eyes to all the possibilities that are out of our reach.

“We need to see the people with the capability to imagine something different as an asset at the company – Be aware that this is a rare skill on board c-level.”

He says Index’ secret sauce is the inspiration injection that a facilitator could bring, and this is why teaching someone how to bring that new perspective would be good.

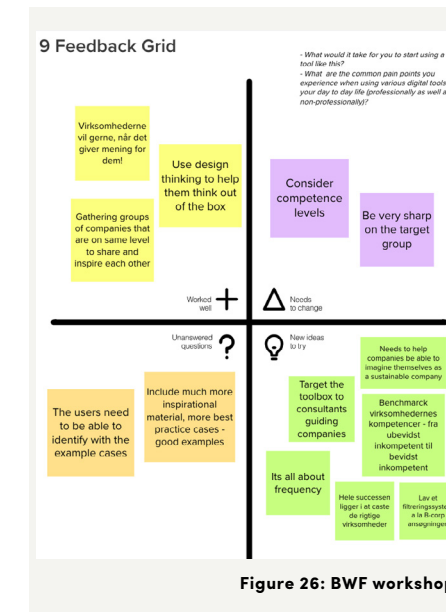
“It’s just not that sensitive to make ideas together once we get started, but the initiative needs to come from management, but it’s crucial it is anchored throughout the whole organisation to succeed.”

He thinks that group learning will be key. Connect those on the same level, and eject those who are not living up to the baseline. He thinks the barrier to entry should be kept high. They need to be on a milestone, and could benefit from following the journey with similar level and circumstance. The mixing of the companies can help them feed off each other’s



energy, and help them all to become bolder.

He placed all ideas indicating an worldview expanding inspiration bank highest up on the matrix, and sees it important to be able to share the process while we are in it and invite other stakeholders to contribute as very important as well. He sees the only ideas he would not see going forward, that it could be done anonymously or alone without the back up from the whole organisation as the



least useful ideas.

FEEDBACK GRID

His end remarks when asked for general feedback on how he could see the use of such tool; *“No one will be wiser by having a lot of incompetent people sitting down to share their view about something they don’t know about. It will inevitably be mirroring the same level of incompetence.”*

They need inspiration, best practice and aspirational cases on their level and fitting their circumstances. No need to display the best of the best in a company like Unilever and Google, but more relatable cases that are on the same level as them.

Sustainable imagination is a skill and competence. Keep the pure focus of this process on sustainability. Reimer sees this as a toolbox more for the sustainability consultants out there that need structured ways to facilitate sustainability transformation if a company hires them. He is unsure about companies initiating this for themselves.

Make it as easy as possible technology wise. The tools become hinders, not helpful if it’s not a format we use frequently.

Unpacking of Workshops

SEE ALL RESULTS IN APPENDIX #11

KLS PURE PRINT / ABOUT THE COMPANY

Kasper is the commercial director, and tells a story of a company that was not fit for surviving another three months when he first started in 2007. It was going so bad that they had nothing to lose by starting something completely different. They had to do something, or close. It was only a three month perspective on the future of the business. They were later a part of Grønomstillings fond accelerator in 2014, where they were given a bit of funding to make shifts, and 6 months of work accompanied with others in similar situations. The urgency helped, and that they could get kicked out if they did not do the work. Their key to their success was the deadline, making them accountable, the funding and the network of other companies.

He says that he thinks the demand for sustainability is now present at every step of the supply chain regardless of industry. "If people don't think it applies to them, they just don't know it yet. No one can afford to wait any longer." Kasper tells us they are around 30 employees. They mostly interact at the same office on a daily basis. Undergoing a transformation like this would have to come from a manager, and would be a task for every manager with responsibility to be a part of. They prefer sitting together in a physical setting and working on tasks like this, and could imagine printable instructions would be best for them.

PLACEMENT OF THE FIRST SET OF IDEAS

Kasper told us that with the experience from the last similar process, that it helped a lot having a group doing it simultaneously, that was more or less on the same level. They met regularly over 6 months, and the deadlines were clear. It was a way for the management team to start thinking differently about it as they got out of the day-to-day tasks when they were doing their normal job.

It was a task and work that is on top of everything else they need to handle, but the network of others could motivate, and make them be more prepared for the meetings with the other

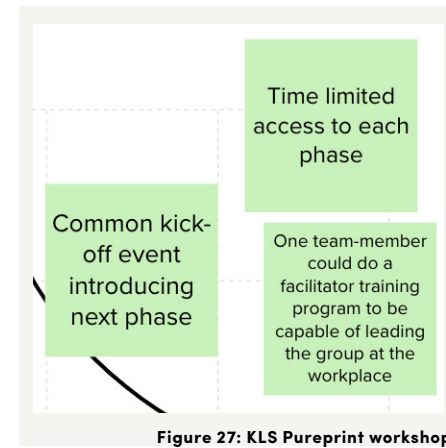


Figure 27: KLS Pureprint workshop

companies. They made time by taking a strategy weekend for the team, outside the company premises.

They felt extra supported as they had a bit of funding to do this process, and that made them prioritize hiring consultants at the critical parts where they needed help.

This reflected his idea prioritization that followed. He thought anything weekly seemed constraining, as weekly is just not possible to enforce, but if it is a process spanning over months, they will have to schedule on their own premises before the next milestone deadline.

He likes the idea of a project lead having more responsibilities and support than others, if it follows a period with other companies. The ideas of kick-offs to get the context clear, and have an introduction for the upcoming phase going well would be a good way to keep the pace up.

They have good experiences having a visual overview of who does what, and a way to tick it off the plan once completed, so it would be good to have an overview of next step content that is awaiting and an approximate on how much time one should spend to complete it.

PLACEMENT OF THE SECOND SET OF IDEAS

Kasper can relate to the issue of getting everyone into the right state of mind. He sees the process of being very ambitious in regard to sustainability on behalf of the company as one of the key parts to have help from facilitators for.

"The "moonshots" can not be created in a two hour meeting, in between one thing and the next. We need to be in the right state of mind, and maybe even go away from our daily office space to get out of the normal roles and duties."

He thinks it's hard to be very ambitious when it comes to change if it's going well. The ones who are not doing so well, just have to rethink. He sees that awareness of the megatrends emerging, and realising that the demand is here and now will motivate companies to make a difference.

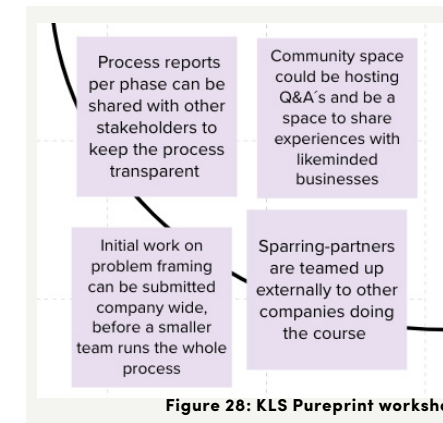


Figure 28: KLS Pureprint workshop

The best ideas in general are all that revolve around making a community with companies on the same level to be mirroring the process and struggles with. Thinks inviting other people to comment and look into the process and progress can be valuable, but it should be carefully selected who those stakeholders are. It will be a benefit to be shared on the way with investors and the advisory board, but not too openly to anyone, as it's fragile in the middle of the process. Good to think of part deliverables, as the idea about process reports.

The ideas he sees as least relevant are the ones about the process of design thinking for the sake of the process itself, and anything keeping the options and issues the company has hidden. They don't want an education to become consultants, they want business results. It's not a wish to learn about Design Thinking, it is a wish to make sustainable change. He sees no need for being anonymous.

FEEDBACK GRID

He says he needs to understand very clearly what is in it for the business. Has no time to dig in and find answers. Needs the whole pitch within three minutes, or he moves on. The technical parts are almost always disturbing, so keep it simple and non distractive. The inspiration and Index network is the main asset for this platform. Inspire how others have succeeded integrating the SDG's in their business.

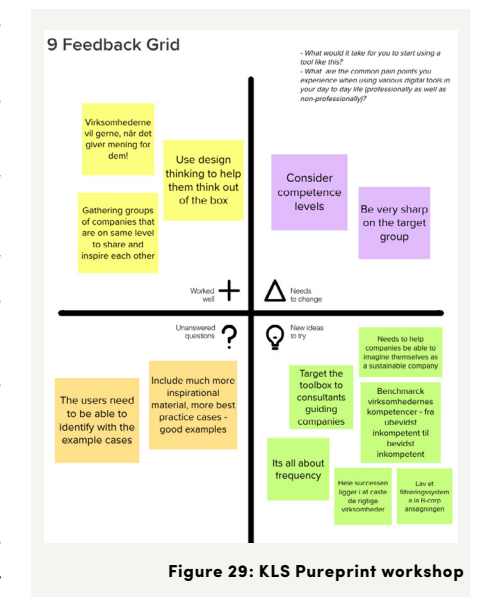


Figure 29: KLS Pureprint workshop

Idea iteration

The idea prioritisation and iteration that follows, is evolved around the findings from the idea sessions as well as more informal reflections from the post workshop evaluation with The Index team.

The input is not interpreted as one to one decisions, but attempts to as far as possible integrate the feedback from the workshops, where we got a better idea of how these two aspirational cases of sustainability focused Danish SME's would see the learning journey in order to use the service that Index Digital Facilitator would provide.

IDEA FILTERING AND POINT OF VIEW (POV) METHOD

After sorting ideas, revisiting and analysing the results, we got a broader view on how and what such courses had to be in order to have an impact and be usable for the Danish SME's.

In the process of dividing all the already existing ideas, new clusters appeared and ideas were continuously developed and further interpreted to fit to the context of the companies. To merge and condense all the findings in the idea prioritisation sessions, the following exercise is called POV, standing for Point Of View. (d.school at Stanford University et al., 2018) The aim is to condense and explain short and precisely enough so that a stranger can comprehend the data instinctively. It helps make data actionable, and promotes finding words to explain the challenge short and meaningfully, and a way to frame the opportunities we have discovered.

We meet..

We were amazed to realise....

I wonder if it means....

It would be game changing if we could find a way to....

Figure 30: POV Method

POV-METHOD

MAIN INSIGHTS

We met

Two Danish directors from micro and small sized enterprises, operating in traditional industries of print and packaging production and fashion brand, but are differentiating themselves in having radically different approaches to supply chain, and both have sustainability at the very core of the companies.

We were amazed to realise

TEAMWORK

Both say they want 3-6 people in the company to work and be involved in this sort of process. They think it needs to be on a management level, but also rooted throughout the organisation. They would both like to see one person be the project-lead, and be the one to get a more in-depth understanding of how to undergo the process.

IMAGINATION CAPABILITY

Addresses the initial work of coming up with an ambitious challenge as the main concern they have, and what would be most important to have a facilitator to inspire and push them further than their own imagination ability.

DIGITAL TOOL

Even knowing it is a "digital facilitator", they want Index to facilitate and inspire them, and refer to all work being done by a team meeting physically, and imagine sparring and conversations with other companies. Both see value in having a digital condensed version of the work in progress to share with other selected stakeholders not taking part directly.

LEARNING COMMUNITY AND ENTRY BARRIERS

They imagine being in a group with other companies on a similar level and size as themselves to be doing the process simultaneously with. Sees the cast and fit of other companies in the same group as crucial for inspiration and accountability. Both like the idea that there are serious entry barriers and even a certification at stake once completion, even though the certificate would not be a big carrot in itself.

ACTIONABLE OPPORTUNITIES

I wonder if it means

TEAMWORK

"The Digital facilitator" only needs to be targeted at training and interacting with one person per company, and empower this person to manage the team in a context aware manner that would suit the company locally.

IMAGINATION CAPABILITY

They imagine one part of the process to be trained and inspired in what sustainability could mean for companies, and one being the actual company related work.

DIGITAL TOOL

Sees the digital platform more as a project management tool to find deadlines, resources and keep track of the process, but that all work should take place physically and in a format they prefer and already know.

ENTRY BARRIERS

They don't think the platform should be open for all, but that it should be a sustainability "readiness"-ability standard that would determine if the company should be able to enter.

LEARNING COMMUNITY

It will be important to facilitate physical or virtual gatherings to keep accountability and seriousness throughout the process.

It would be game changing if we could find a way to

READINESS-EVALUATION

Create an application format to access the free course that would handle the "readiness"-evaluation of the company wanting to get started.

FACILITATOR TRAINING

Create ways to set up an onboarding process that would empower the employee in change, create a commitment agreement to set the expectations of the process, while reassuring the company that they have been set up in a group of companies with similar challenges and aspirations.

ASPIRATIONAL INSPIRATION

Help with the "sustainability challenge"-selection by providing impactful inspiration that would help the company reach a significant goal to transform their business, and promote alignment in the scoping and ambitions between all relevant stakeholders.

COMMUNITY ENGAGEMENT

Facilitate for a safe and challenging community, enabling feedback, sparring and collaboration. Create a way to facilitate an end of the process gathering, pledging what to implement, making it official by presenting the ideas and solutions, and publicly set the intention for next steps.

DIGITAL DELIGHT

Ensure digital ease of use, by helping to set up for the simplest possible team collaboration and caption of results for a broad range of companies contexts.

Crafting a future state User Journey

The ideation work up until this point had been done in a nonlinear matter, in regards to a potential User Journey. The ideas had been evolving around the Design Requirements. This was a choice made to avoid being locked into the most obvious the here-and-now conditions of how the course would be conducted, trusting that simply relying on the various Design Requirements would cover the service offering throughout. Building a User Journey, helped concretise the experience in a coherent flow. The ideas were spread out following the Game-Changers, identified in the POV. This served as a filtering of ideas, as they were merged if overlapping occurred, and placed in a flow within a potential future state User Journey.

The steps in the entire user journey a person from a company would undergo, would consist of four main phases for the companies to go through. To divide the ideas and how they would shape the service, the User Journey is starting already at the stage of “Awareness and Consideration” and ending at “Completion and Continuous Learning Community”. Moving forward the design of the experience, building a platform serving as a “Digital Facilitator of sustainable business transformation”, the experience is taking place beyond the start of the first exercise.

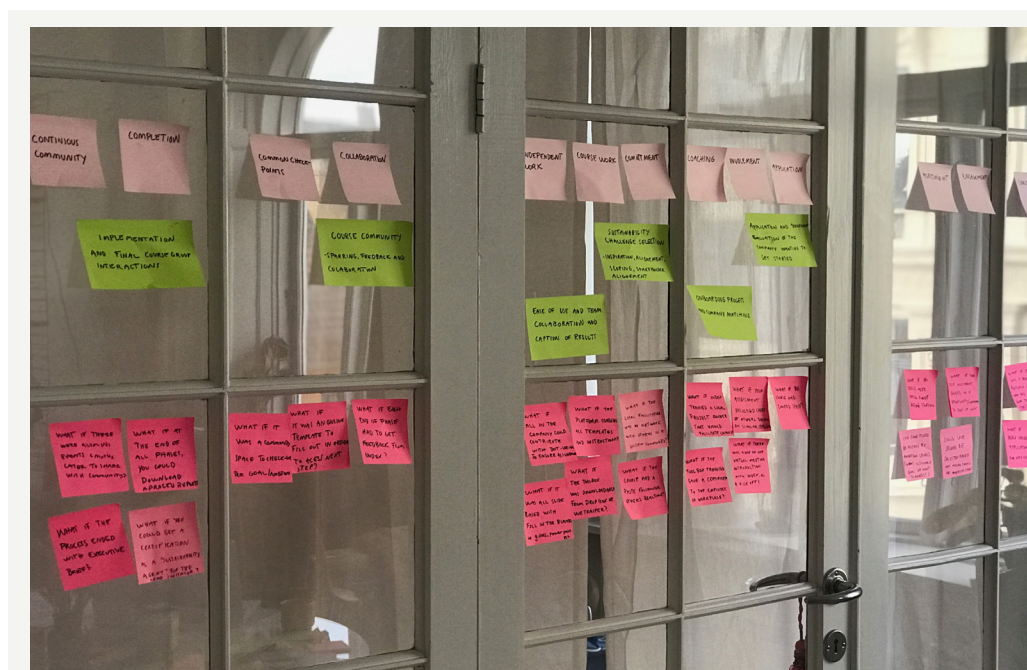
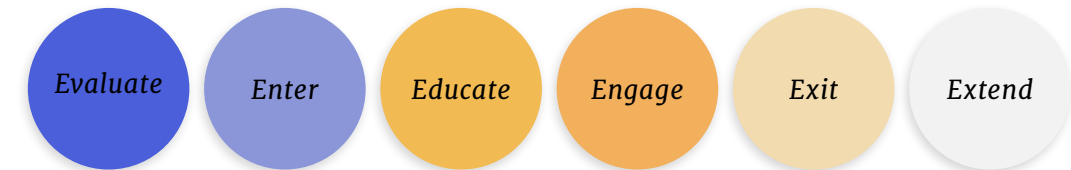


Figure 31: Placement of ideas, game-changers and phases.

THE PHASES OF THE USER JOURNEY



EVALUATE & ENTER

The first being a “Evaluate & Enter” phase, where the representative from the company would have to understand the value proposition Index is providing, and find out about the process, maybe see cases and understand what impact companies have achieved from undergoing it, and if their company and what challenge they are looking to transform, would make them eligible to undergo the course.

PHASE	<i>Evaluate</i>		<i>Enter</i>	
USER ACTIONS	Awareness	Consideration	Assessment	Application
ACTIVITY	Sees announcement of next upcoming course	Reads more about content and expected commitment	0 Quiz: Assess Organization	Requests to participate

EDUCATE

The second stage would be the “Educate & Engage” phase, where the company would learn about the details about the process, and with the help of some coaching be getting familiar with the introductions. They would need to be selecting a team, and do the stakeholder alignment needed to start working on the process.

PHASE	<i>Educate</i>			
USER ACTIONS	Involvement	Coaching / Training	Commitment	Independent work
ACTIVITY	Goes through onboarding material	Attends and completes the facilitator training sessions and lessons	They orient themselves in the coursework material they now gain access too	Creates a plan and invites team to workshops

ENGAGE

The second part of “Educate & Engage” phase would be where the companies get working with each of the 12 steps in the Design Thinking process. Here they would work independently in the team at the workplace, as well as take part of the community of other companies undergoing the process. They would have to give and get external feedback, and participate in common checkpoints throughout the duration of the process. By the end of the process, they should have gotten to the stage of implementing the sustainable changes in their companies, and start to reflect around next steps for them on their journey.

PHASE	Engage						
USER ACTIONS	Company collaborative work						
TASKS	1 Define Challenge	2 Know Your Challenge	3 Get into the field	4 Make Sense of Your Data	5 Reframe Challenge	6 Develop Prototype	7 Build Story

PHASE	Engage						
USER ACTIONS	Common checkpoints		External collaboration and sparring				
ACTIVITY	Participates attend sessions along with the other companies		8 Test Prototype	9 Refine and Finalize	10 Implement	11 Evaluate and Maintain	

EXIT & EXTEND

The final stage is the Exit & Extend phase, where the course with Index and the other companies would come to a formal completion. A way forward would be to still facilitate a continuous community, maybe in a network or community forum, or by being able to extend contact by attending future events with The Index Project.

PHASE	Exit		Extend	
USER ACTIONS	Common checkpoints		Continuous community	
ACTIVITY	12 What is next for you?	Final presentations	Attends relevant Index events for alumni	Stays in community forum on LinkedIn

PHASE	Evaluate		Enter	
USER ACTIONS	Awareness	Consideration	Assessment	Application
ACTIVITY	Sees announcement of next upcoming course	Reads more about content and expected commitment	0 Quiz: Assess Organization	Requests to participate

PHASE	Educate			
USER ACTIONS	Involvement	Coaching / Training	Commitment	Independent work
ACTIVITY	Goes through onboarding material	Attends and completes the facilitator training sessions and lessons	They orient themselves in the coursework material they now gain access too	Creates a plan and invites team to workshops

PHASE	Engage						
USER ACTIONS	Company collaborative work						
TASKS	1 Define Challenge	2 Know Your Challenge	3 Get into the field	4 Make Sense of Your Data	5 Reframe Challenge	6 Develop Prototype	7 Build Story

PHASE	Engage						
USER ACTIONS	Common checkpoints		External collaboration and sparring				
ACTIVITY	Participates attend sessions along with the other companies		8 Test Prototype	9 Refine and Finalize	10 Implement	11 Evaluate and Maintain	

PHASE	Exit		Extend	
USER ACTIONS	Common checkpoints		Continuous community	
ACTIVITY	12 What is next for you?	Final presentations	Attends relevant Index events for alumni	Stays in community forum on LinkedIn

Scenarios and Storyboarding

In the process of drawing out the overall User Journey, spreading out the already existing ideas from earlier ideation, gave the opportunity to see the whole sequence of events more clearly. In this process, a few steps seemed more complex and important to find a way to solve, and these were the concepts of the solution that I chose to work on developing further.

The process is inspired by d.School Design Thinking Bootcamp methodology (Hasso Plattner Institute of Design at Stanford University., 2019) where the concept ideas get named, matched with the game changer, and described in what intended impact it will create, and one key function it will serve.

The ideas then became vivid scenario, when it was connected to the “Game Changing” concepts, that were created as a response to the insights identified in the POV. This method is used to explore the concept in context of the user and make it into scenarios, taking the concept to life, with the consideration of the actors, actions and the time and place. The build up of each scenario is taking into consideration the learnings from The Hooked Model, considering how the experience is using triggers, actions, investments and viable rewards. (Eyal, 2014)

These “Game Changers” were chosen as they are some of the moments are especially critical to solve in each phase of the user journey, and can potentially become the “Moments of truth” (Curedale, 2018), that have the potential make or break the user perception of the service offering, and can set the tone on their attitude towards the service. This created the basis for concept development and crafting scenarios.

The scenarios have the purpose of constructing plausible situations and explore the idea, explain a service idea as a story, contain as much detail that it will be meaningful, and can spark discussions (Stickdorn & Schneider, 2011). The scenarios are then accompanied by simple illustrations to start to imagine how these functions might be presented in the digital platform, as well as play out in the context of the users. Drawing the ideas as wireframes are the method for exploring the possible digital form it would take and functions to be incorporated, without considering the details of the final visuals.

THE GAME-CHANGERS TO BE PROTOTYPED

READINESS-EVALUATION

Create an application format to access the free course that would handle the “readiness”-evaluation of the company wanting to get started.

COMMUNITY ENGAGEMENT

Facilitate for a safe and challenging community, enabling feedback, sparring and collaboration. Create a way to facilitate an end of the process gathering, pledging what to implement, making it official by presenting the ideas and solutions, and publicly set the intention for next steps.

ASPIRATIONAL INSPIRATION

Help with the “sustainability challenge”-selection by providing impactful inspiration that would help the company reach a significant goal to transform their business, and promote alignment in the scoping and ambitions between all relevant stakeholders.

FACILITATOR TRAINING

Create ways to set up an onboarding process that would empower the employee in change, create a commitment agreement to set the expectations of the process, while reassuring the company that they have been set up in a group of companies with similar challenges and aspirations.

DIGITAL DELIGHT

Ensure digital ease of use, by helping to set up for the simplest possible team collaboration and caption of results for a broad range of companies contexts.

SCENARIO #1

Readiness filtering

THE CONCEPT IDEA

GAME-CHANGER & INTENDED IMPACT:

Create an application format to access the free course that would handle the “readiness”-evaluation of the company wanting to get started.

IDEAS MOST LIKELY TO ACCOMPLISH THIS GAME CHANGER:

- What if the self-assessment ended in a sustainability opportunity and weakness to start off with?
- What if the self assessment would be giving the company an indicator of the opportunities they could benefit from working towards?

TARGET USER:

A decision-maker in the company

ONE KEY FUNCTION:

Self assessment quiz that will show benchmarking against industry peers and give a scoreboard of current situation.

THE SCENARIO

TOUCHPOINT:

A quiz format to be done at desktop or mobile, saving results as a user on the platform to make their investment of time and data feel worthwhile.

TRIGGER:

A call to action button to access the quiz to launch the readiness assessment.

WHERE:

Entering from The Index Projects social media channels like Instagram or LinkedIn, or an email or coming from the homepage.

ACTORS:

The decision maker alone, but with potential stop underway to gather more data to accurately assess readiness, and with the opportunity to share results of the assessment more broadly with others in the company after completion.

SCENARIO #1

Readiness filtering



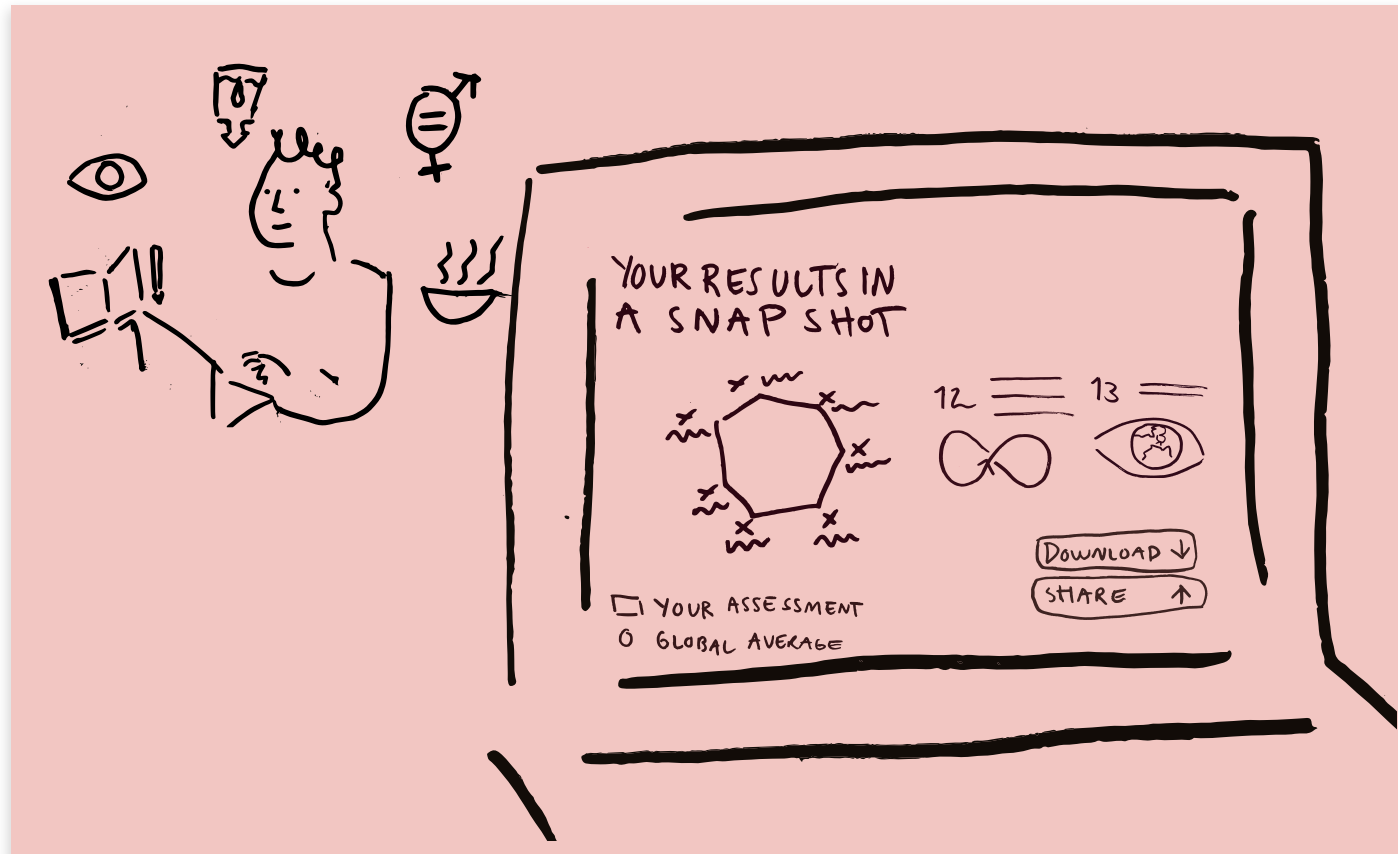
01. INITIAL SIGN UP: WARM UP AND GATHERING DATA ABOUT THE COMPANY

The company provides baseline data about their company and their context to access the evaluation dashboard.

02. BASELINE SUSTAINABLE MINDSET EVALUATION

“See how your company can contribute to the SDGs, and use this assessment to identify where your company should prioritize its efforts. We recommend that your company fills out this context specific analysis to identify priority SDGs you should focus on.”

Readiness filtering



03. HOW IS YOUR ORGANISATION CURRENTLY WORKING WITH THE SUSTAINABLE DEVELOPMENT GOALS?

Has your company done any of the following to specifically contribute to the Sustainable Development Goals?

1. Has your company done any of the following to engage stakeholders about your social and environmental performance?
2. Thinking about ..., please indicate the extent (1-5) to which you agree with the following statements: [...]
3. [...]

04. READINESS ASSESSMENT

"Looking at your answers and profile we see opportunities for your company to work further with Human rights, Business Model, Environment and Internal Operations, we believe that the top goals for your business to address could be SDG Goal 9: Industry, Innovation and Infrastructure and Goal 13: Climate Action."

Readiness filtering



05. RESULTS OF ASSESSMENT, WITH INDUSTRY COMPARISON AND CURRENT STAGE SCOREBOARD

Your scores below are being compared against our library of 749 Businesses that also have 1-9 employees. Companies at similar size and industry scores, which place you below average on these barometers, and above average at these.

Download and share your scoreboard results.

06. INVITATION TO APPLY FOR THE NEXT ROUND OF THE PROGRAM

The results of the assessments qualify you to apply for The Index Project, a 26 week collaborative learning journey for sustainable business transformation.

The Index Project will guide you on how to use Design Thinking to transform your business for a more sustainable future, accompanied with a group of six other carefully selected companies in your industry.

Would you like to take action to differentiate yourself? Apply here.

SCENARIO #2

Group alignment and facilitator training

THE CONCEPT IDEA

GAME-CHANGER & INTENDED IMPACT:

Create ways to set up an onboarding process that would empower the employee in charge of leading the process locally, and create a commitment agreement to set the expectations of the process, while reassuring the company that they have been set up in a group of companies with similar challenges and aspirations.

IDEAS MOST LIKELY TO ACCOMPLISH THIS GAME CHANGER:

– What if the course has limited spots, and the groups have a common gathering to kick start the community, before starting the process in their teams locally?

– Once completed this facilitator training program gave a certification and full access to the tasks for the employee at the workplace?

TARGET USER:

The employee trusted to lead the process in the company

ONE KEY FUNCTION:

Gathering format will ensure group alignment, and create commitment to the process and seed a prospering community.

THE SCENARIO

TOUCHPOINT:

A video conference format.

TRIGGER:

Mail invitation to kick off event regarding "Group alignment", as a part of a facilitator training program.

WHERE:

At the Index company videoconference medium, accessible for everyone with an invitation.

ACTORS:

The employees from Index, acting as facilitators and moderators, gathering the participants representing their respective companies.

SCENARIO #2

Group alignment and facilitator training

**01. SETTING THE STAGE:**

The Index moderator will be the host of the session, give important messages and inform everyone about the expectations, as well as act as the mediator dividing time between the representatives, inviting each representative to take care of a short intro to their company and invite everyone to state what they want to focus on in the process.

02. WELCOME TO THE KICK OFF

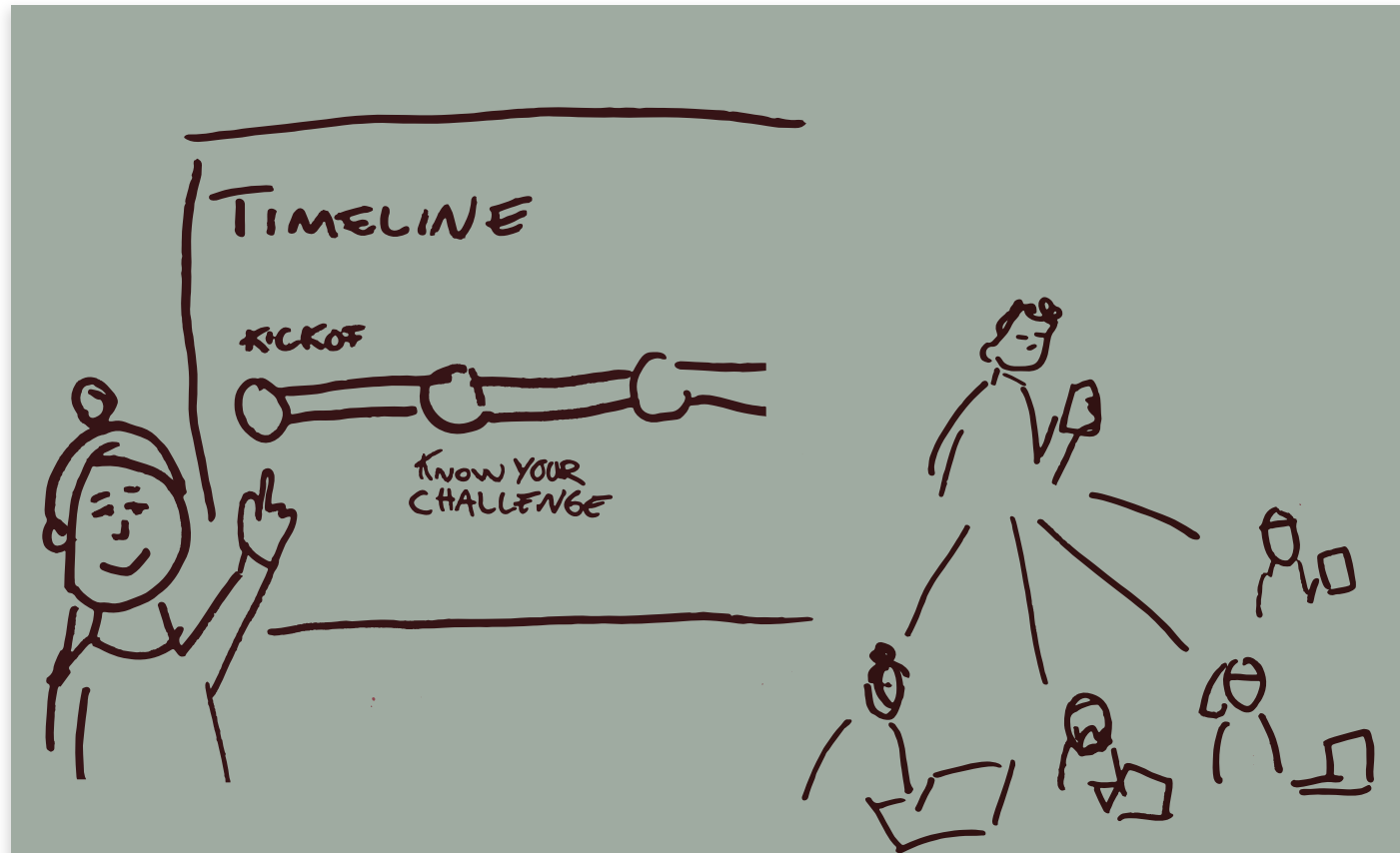
Welcome to this learning journey. We are excited to be following you for the next 26 weeks.

This is a community kickoff, where the focus today will be how you can help your team create connections with each other and build momentum around the process.

As you are chosen to be the group moderator at your workplace, you will have to work on alignment, and these sessions will teach you how to facilitate the Design Thinking process, and how to prepare your team.

SCENARIO #2

Group alignment and facilitator training



03. INTENTION AND EXPECTATION SETTING

The moderator invites everyone to share why this course matters to them, and how it relates to their organization's bigger vision and purpose. **"How are we going to get this work done?"** Outline the logistics, the scheduled meetings, and expectations of your team. **"Can we count you in prioritizing it in the recommended timeline?"**

The course will expect you to give and get feedback to the other companies present, as we see that this gives you the opportunity to explain what you're learning in your own words and apply your knowledge to new situations.

04. SEED COMMUNITY

Research also shows that collaborative learning promotes engagement and benefits long-term retention. The group is a space where we support and challenge each other's learning journey. If much of your learning happens when you're alone outside your area of expertise, it can be valuable to have a chance to discuss it with others, therefore we want to welcome you to the community group, where we will share news and the preparation material will be posted, as well as encourage you to ask questions between gatherings.

SCENARIO #3

Aspirational inspiration

THE CONCEPT IDEA

GAME-CHANGER & INTENDED IMPACT:

Help the companies with the Sustainability challenge selection, by providing aspirational inspiration that would help the company reach a significant goal for their business, and promote alignment in the scoping and ambitions between all relevant stakeholders.

IDEAS MOST LIKELY TO ACCOMPLISH THIS GAME CHANGER:

- What if the case studies can make use of Index case catalogue of previous course participants, (similar to the current of winners and nominees for the award), and filter according to the companies context and category?
- What if we could show how it works to be a business changing ways to contribute social-, economical- and environmentally-sustainable design?

TARGET USER:

All employees with functions across the hierarchy of at the workplace

ONE KEY FUNCTION:

Describing the case studies by showing the challenge, the outcome and the impact achieved of others that have undergone such a process. Showcase illuminating the tangible ways of which different barometers can be used to measure how we can be accomplishing sustainable business.

THE SCENARIO

TOUCHPOINT:

Landing page on desktop or mobile.

TRIGGER:

A notification in the calendar is pushed to each member of the team, reminding them to prepare before they set out to work together on the unlocking the very first phases of "Define The Challenge"

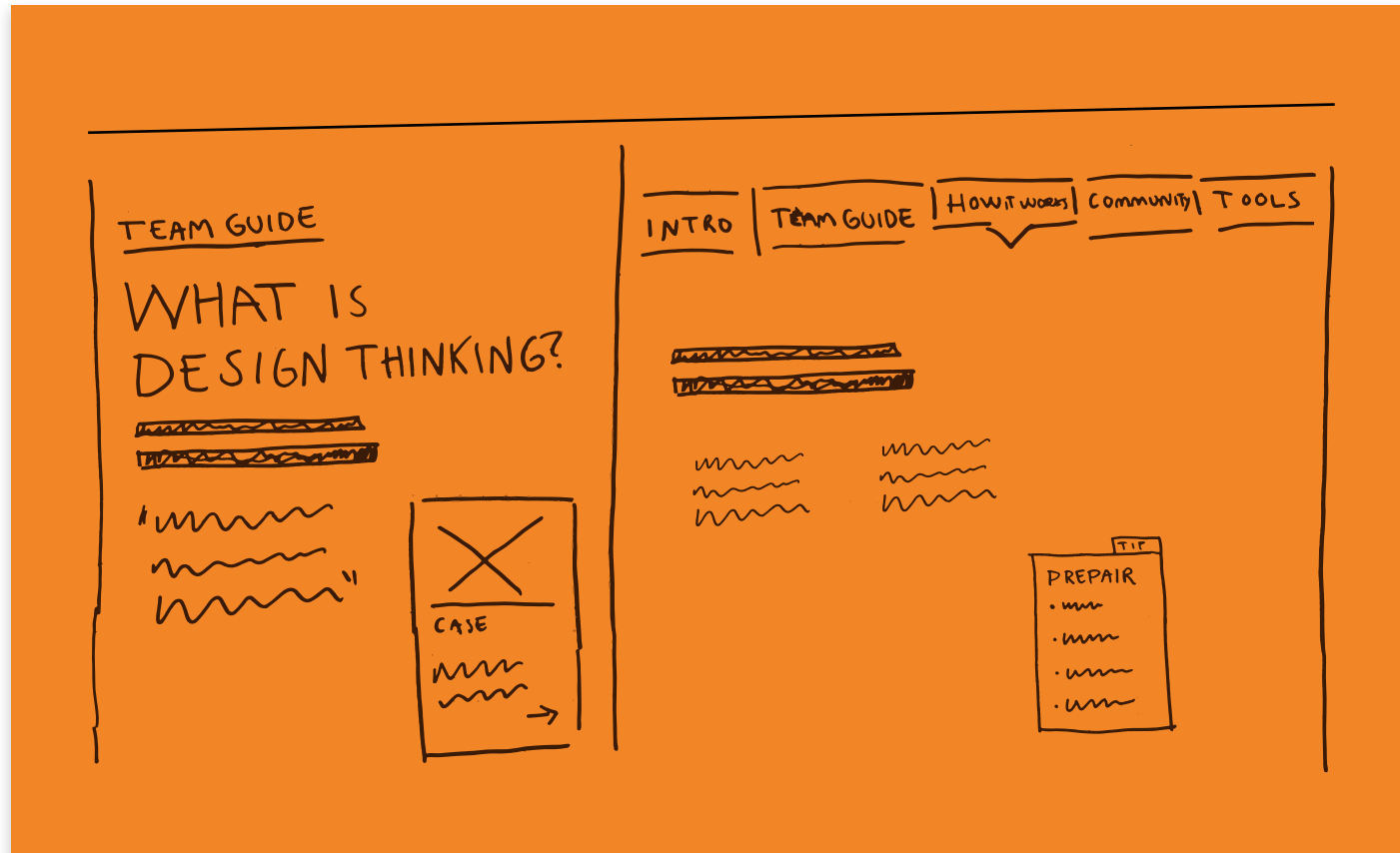
WHERE:

The Index Platform company page as a "Team Process Guide" with relevant case studies, practical checklists to prepare and access to tool previews

ACTORS:

The project team of employees working on the challenge together, but as an individual preparation task in order to access first step of the process.

Aspirational inspiration



01. PREPARE FOR THE TEAM GATHERING

Entering the process where the selected team from the company will do collaborative work, it is crucial to have a good understanding of the process to be ready for the team gathering.

About to enter the phase “Define the Challenge”, the team needs to have alignment and common ground of expectation of the labor and time that will be needed, before they will gather and have their first session together.

They will benefit from having an introduction to what “Defining a challenge” looks like, and they open the Index platform instruction page to get ready to start the individual preparation.

02. GETTING COMFORTABLE WITH THE TERM “SUSTAINABLE BUSINESS TRANSFORMATION”

To warm up, there is an introduction to what The Index Project is working for, and their expertise working for 20 years with “Design To Improve Life.” The platform will be explaining what a “Design Thinking”-mindset means, and the platform attempts to be bridging the terms of Sustainability, The Sustainable Development Goals, Business Transformation and the method of Design Thinking that will create the foundation of the whole process.

Aspirational inspiration



03. CREATING COMMON GROUND

The platform makes it accessible to find an overview of the whole learning journey, as well as give appetisers to the type of work the next phases will require, and as well as showcase examples on the workbook and templates they will work with. Short videos can introduce the intended impact potential of the phases and give everyone a shared basis before starting the work.

Tips boxes give hints on how to make the most out of the process. Ex: “Schedule and Prepare: We encourage you to spend 15-20 minutes on your own to reflect on the phase prior to each team meeting.”

04. GETTING INSPIRED BY MIRRORING IN SIMILAR CONTEXT CASES

Based on the initial profile of the company, the platform would generate showcases suitable to inspire. The cases on display have been filtered to be companies of similar team size, revenue, belonging in the same industry and or sustainable challenge they took on. The cases are short and sweet presented like a deck of cards, with the possibility to dive deeper to any one of especial interest on its separate landing page.

SCENARIO #3

Aspirational inspiration

WHAT IF?



05. PROVOKING IMAGINATION CAPACITY

Going into challenge framing, the platform will be highlighting a few SDG's that would be especially relevant in the industry the company operates in. Having the SDG goals top of mind, the platform helps to facilitate the openness by presenting questions and give prompts to trigger imagination.

As the concept of sustainability can sometimes be perceived as intangible, this page also explains any potentially foreign terminology, by linking to glossary function.

SCENARIO #4

Facilitate a challenging community

THE CONCEPT IDEA

GAME-CHANGER & INTENDED IMPACT:

Facilitate for a safe and challenging community, enabling feedback, sparring and collaboration. Create a way to facilitate an end of the process gathering, pledging what to implement and making it official by presenting the ideas and solutions, as well as and publicly setting the intention for next steps beyond the process.

IDEAS MOST LIKELY TO ACCOMPLISH THIS GAME CHANGER:

– What if each phase ended in a gathering hosted by Index, where everyone presents the outcomes and takeaways, and the ideas and prototypes were tested and given feedback by the group of other companies?

TARGET USER:

The whole team doing the process, or at least two representatives

ONE KEY FUNCTION:

To ensure formalising the ideas and decisions, there is an online template to fill out before the presentation, so that the results of the work would be formalised, and this was done to unlock and access the next steps, while it simultaneously would build a case bank.

What if it was required to give feedback on at least one other company's submission in order to move on?

TOUCHPOINT:

A video conference and the submission landing page

TRIGGER:

A notification in the calendar is pushed to remind them of the common gathering event.

WHERE:

At the Index Platform case bank and at a company video conference platform, accessible for everyone with an invitation.

ACTORS:

Teams at the companies and Index moderators

THE SCENARIO

SCENARIO #4

Facilitate a challenging community

01. WELCOME TO THE PRESENTATION FROM EACH TEAM

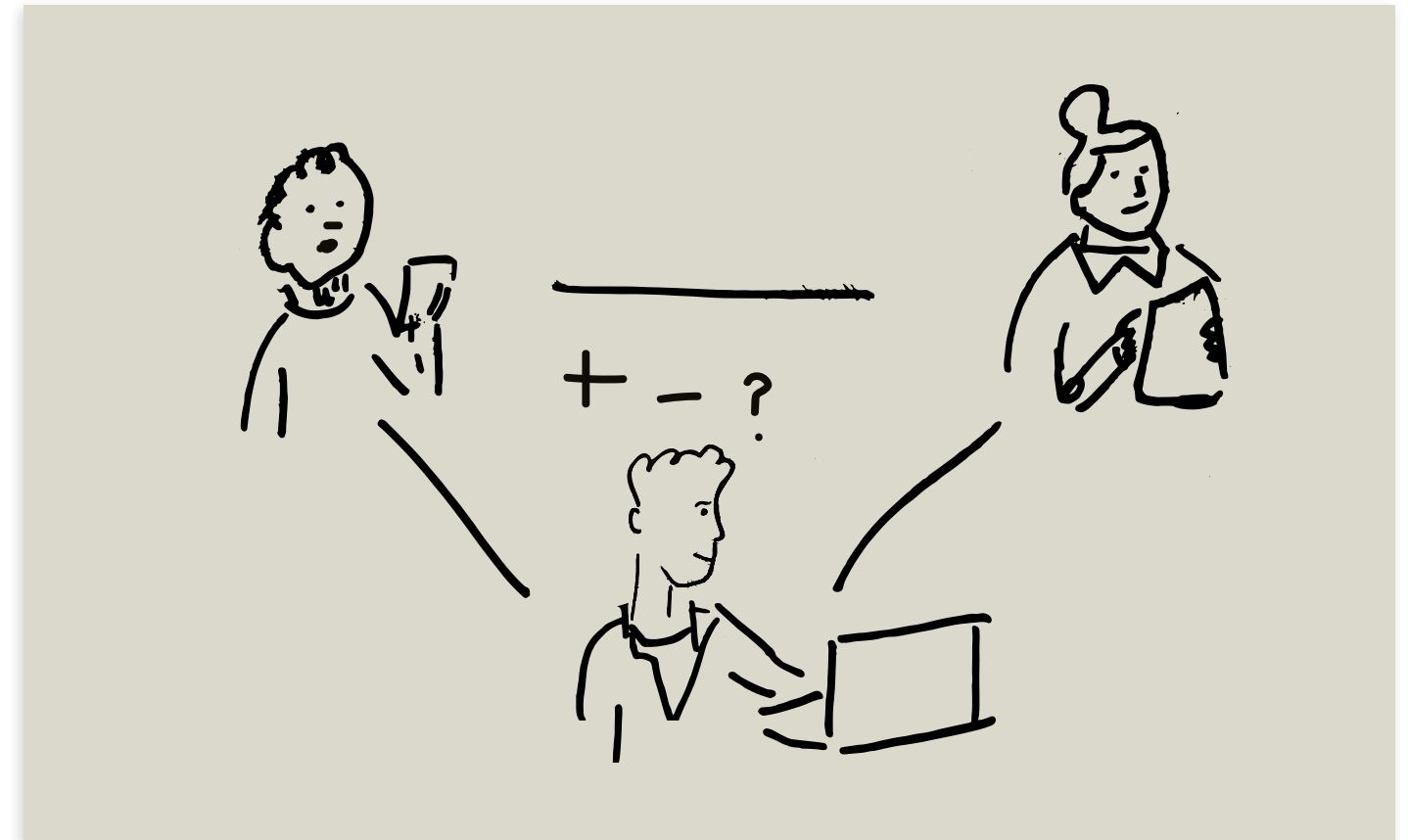
The teams presentation template is submitted as a presentation where each team has 20 slides and is given 20 second to spend per slide, making it a fast pace presentation, inspired by the japanese "PechaKucha" format.

This is giving each a total 6 min 40 seconds to explain their teams recent development in the closing phase.

02. FEEDBACK SESSION

The group is then split up into smaller groups of two to four companies where they all give feedback to each other and can discuss further amongst themselves, accompanied by a community manager from Index that will help facilitate.

SCENARIO #4

Facilitate a challenging community

03. CONSTRUCTIVE FEEDBACK

The feedback format is created as a statement "I like", "I wish" and "What if", to ensure wholesome feedback amongst each team member. The "I like", is representing something that worked well, and related to the most positive. The "I wish" is there to make an idea of an opportunity that is yet to be explored, and the "What if" is a way to help with another view related to something that isn't working yet and has space for improvement.

04. TANGIBLE TAKEAWAYS

Everyone present in the presentation gatherings has to contribute and both give and get feedback, which creates safety and respect in the forum. The takeaways will be saved as comments, so it's easier to remember and bring along to the next step. The deadlines and end of phase gatherings will promote accountability and pace of the process.

SCENARIO #5

Wide accessibility

THE CONCEPT IDEA

GAME-CHANGER & INTENDED IMPACT:

Ensure digital ease of use, by helping to set up for the simplest possible team collaboration and caption of results for a broad range of companies contexts.

IDEAS MOST LIKELY TO ACCOMPLISH THIS GAME CHANGER:

– What if the whole process and facilitation guide with workbook templates was open source, and available in a wide range of commonly used work formats, so you could download a format of choice?

TARGET USER:

The companies local team facilitator

ONE KEY FUNCTION:

The platform is project manage giving a step by step overview of the phases, empowering the person leading the process at the company by organising any and every needed practical detail that can help the facilitator.

THE SCENARIO

TOUCHPOINT:

The course platform

TRIGGER:

A notification of an email about the released resources for the facilitator

WHERE:

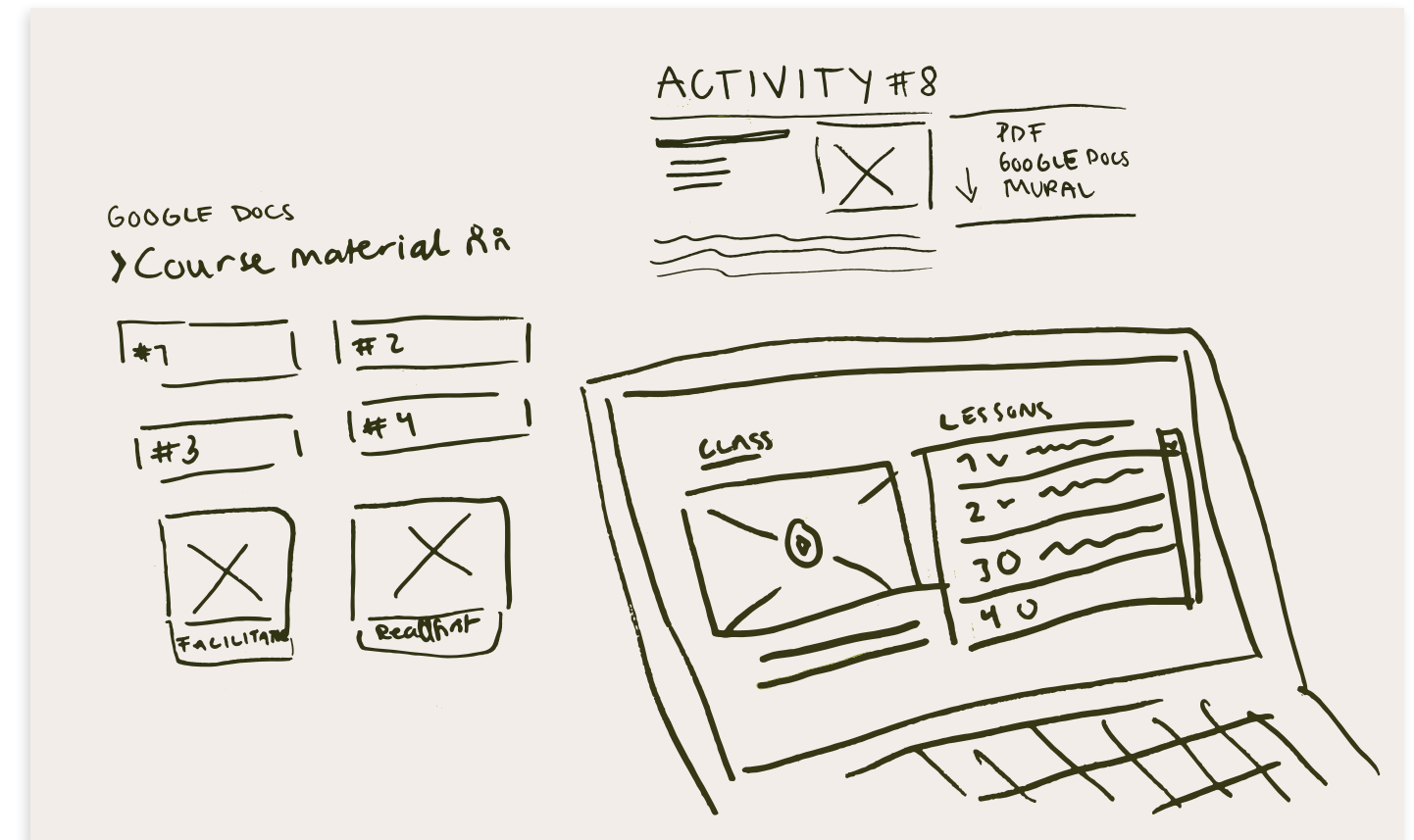
At the Index Platform template central on the platform

ACTORS:

The company's local facilitator

SCENARIO #5

Wide accessibility



01. PLANNING THE PROCESS

Before facing her team, the facilitator wants to make sure she knows what will be needed from her, and sits down to prepare as she wants to feel ready to confidently guide her team through the tasks.

02. FOLLOWING THE GUIDES

She can read about each step, and see the templates organized as she would need them. She is happy to see the download is available in a few formats, with all material per task lined up and ready to use.

Selection of scenario to prototype further for validation

Moving forward with the story boards scenarios, a lot of questions were still unanswered in detail, therefore I developed further on one Game-changer ideas. The idea I took a closer look at, was the scenario of “Group alignment and facilitator training”, as this process of onboarding and empowerment of the participants from the companies, seemed crucial in order to have a service to deliver at all, and therefore this concept seemed as a “must-win”-case in the user journey.

Giving the idea for the format of the “Group alignment and facilitator training” a lively feel, I was inspired by IDEAN and Adobe's latest collaboration on the publication on design systems “Hack The Design System – Revolutionize the way your organization scales design” (IDEAN & Pyrhönen, 2019) They have system for shortlisting what the most important screens to test an idea with, called “The 3-3-3 test”. The outcome of this method will provide a realistic and relatable view of what future products and services will look and feel like, as well as offer a way of how we can validate the principles and shared assets.

Going back to the previously defined user journey, and investigating the phase of “Educate”, I started to define concrete ways and forms for some critical parts of this phase. This made me create a concrete expression for five screens that would be a part of the user journey screens being “Landing page and Expectation Alignment”, second “Video instructions”, “Fold out process and method links”, “Asset library links”, and “Training session completion”, by wireframing in simple blue hues and abstract visual expression, but with clear resemblance to everyday formats we interact with in our everyday life. Using The 3-3-3 method I ended up with an alpha prototype ready to be tested.

Prototype fidelity

For the validation session one of the possible Scenarios were selected to be investigated further, as the idea felt like it would be intertwined with several other feature branches of the concept ideas, and this way prototyping this specific scenario would indirectly help create clarity about other ideas too. The idea was made into an Alpha test (Curedale, 2018). An alpha test holds lower fidelity, but gives the understanding of how the service will work. This format allows us to test major risks and see if a concept is viable. The questions we get the answers to would be if the concept would be the best solution, if the concept work and if we have a clear understanding of the users needs.

An important part of any Design Thinking and UX design project, would be to have testing and validation. There are variations in what the best practice is, but according to for example The Sprint method by Jake Knapp for Google Ventures, claims the magic number is five test participants, as this is the stage where the amount of new feedback is stalling. (Knapp,

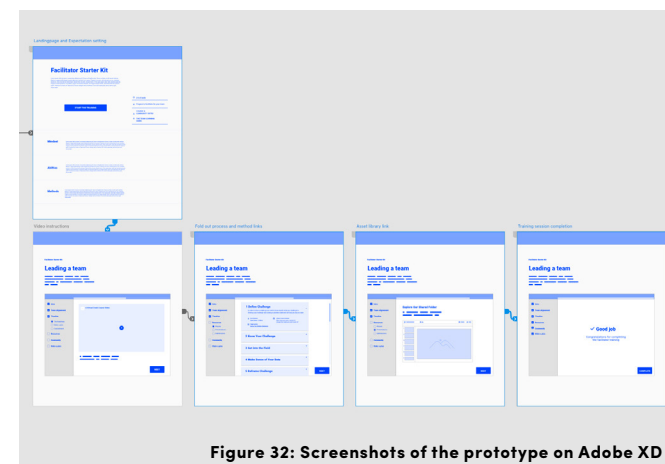


Figure 32: Screenshots of the prototype on Adobe XD

2016) Knowingly that it would be best to have several participants testing, there was only one participant for this condensed validation process. As limitations due to COVID-19, made the thesis collaboration partnership and ultimately less active than what we initially aspired for, I choose to use my own network to recruit a participant for this testing.

Recruitment of Participant

As the closing activities of the Develop Phase, I recruited an expert in digital facilitation to give feedback to the Scenario ideas and interact with an Alpha prototype of one of the concepts.

Expert user: Henriette Wulff, Digital design project manager for Future Leaders Global and expert in Social entrepreneurship.

Henriette was recruited as she currently working with Future Leaders Global, whom for five years have been training local teams how to facilitate and run a eight to five gathering leadership program. To this day Future Leaders Global has gotten more than 500 youth participation in their leadership program across Norway, Denmark, Sweden, Germany and Zimbabwe.

She is currently working on scaling the program, by doing initiatives such as the release of the program as an open source resource on Gitbook, recently launched “Welcome to the Future Leaders Global Playbook – Playbook”, their open Google Drive folder, and their “Virtual Office” Miro board, as well as seeing though that Future Leaders are just about to launch their first ever digital program in autumn 2020. (Future Leaders, 2020)

The goal was to get her input and find out how the scenario was feasible, and to get input based on her understanding and experience working with an organisation dependent on global digital facilitation.

Planning the testing

The Sprint Method also provides a five act user testing interview set up, called The Five-Act Interview (Knapp, 2016).

Act 1: Friendly Welcome

The first act is to set the stage with a friendly welcome, preparing the user for what will happen and what the purpose of the testing is.

Act 2: Context Questions

Contextual questions are meant to give an idea of who the user is, and what their attitude is towards the topic.

Act 3: Introduce the Prototype

The prototype should feel real, but fidelity will ultimately impact the answers. To get the best possible feedback the user should be feeling as if it's okay to come with feedback, and know that it is in no way them who are being tested. Here we can encourage thinking out loud and asking questions on the way.

Act 4: Tasks

In this act the user should be asked to go through the flow of events, and talk out loud explaining what they want to do and why. The interviewer should stay out of the interactions, but ask open questions to help the participant thinking out loud.

Act 5: Debrief

Ask questions to confirm or correct what you just went through, and ask for some closing general feedback.

Alpha Prototype Testing

Henriette joined the workshop remotely, having a link for the alpha prototype, where she could see the Adobe XD in a Usability Testing view-mode.

Setting the context

Asking her about the her relation to the topic of Facilitator Onboarding, she tells me she has spent the day interviewing four inspirational candidates for the first ever remote Future Leaders Program, where she is currently working on designing the program. This takes a bit of compression, as it will be only three gatherings, not five, and this makes it even more crucial to be selecting the right tools for the three gatherings. She tells me that working with inspiring candidates makes her feel humble, and really motivated to get the program right.

They are currently testing with Zoom and breakout rooms, and the biggest challenge is to create that energy, trust and intimacy between the participants.

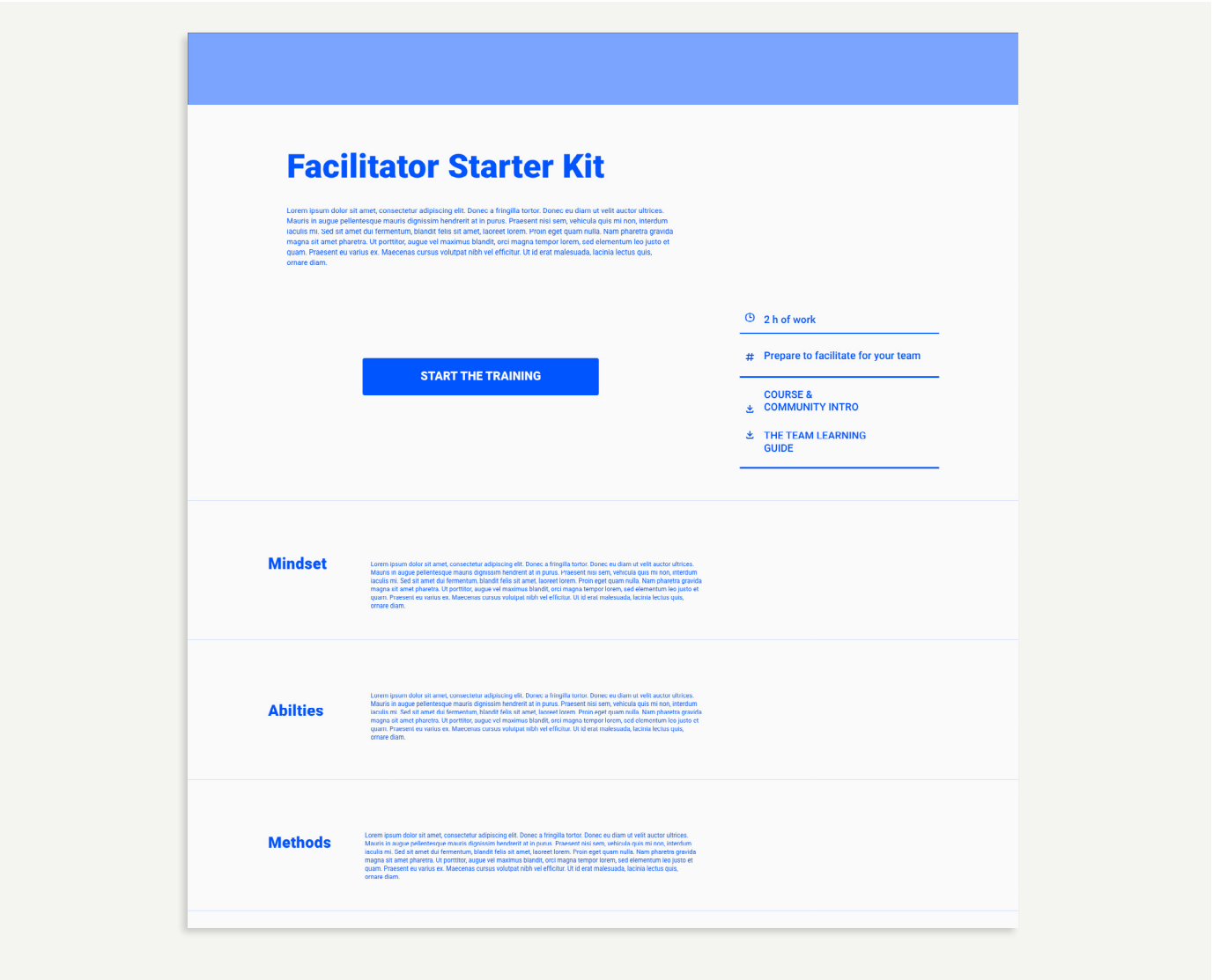
Introducing the prototype:

As an introduction before we went on to see the wireframes, I read out loud the game changer idea, as well as show her the low fidelity scenarios storyboard to get her into the context of what ideas we are talking about. I asked her to talk about what she interprets and thinks about what each screen view is about.



First screen: The facilitator starter kit

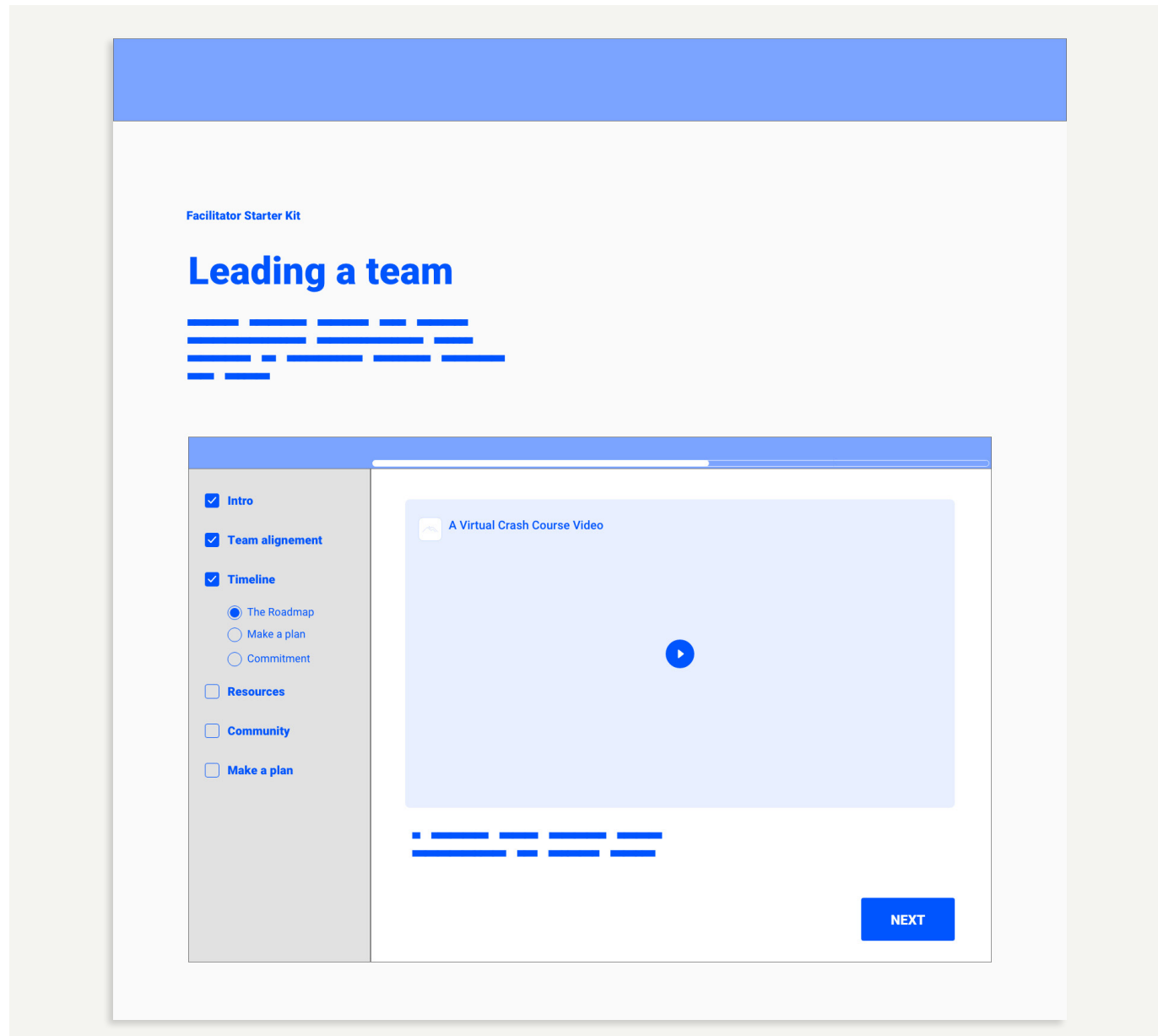
She explains that she enjoys having a smooth intro to starting, and feels sure what this is about and likes that the time expectation is clear. She says that she is unsure if this should be introduced to early, and says that in Future Leaders they will normally have one or even two digital meetings in place with the potential initiators, to make sure that they understand the purpose and work on aligning. Her experience is that there is generally more need for context and in depth explanation, than we could hope, so the future facilitators will be eased into the intention and expectations. We need to be on the same page, before people are let loose in the practical how to. The first meetings should always focus on motivation and mindset. Are we all on the same mission here?



Screen two:

Timeline Roadmap video

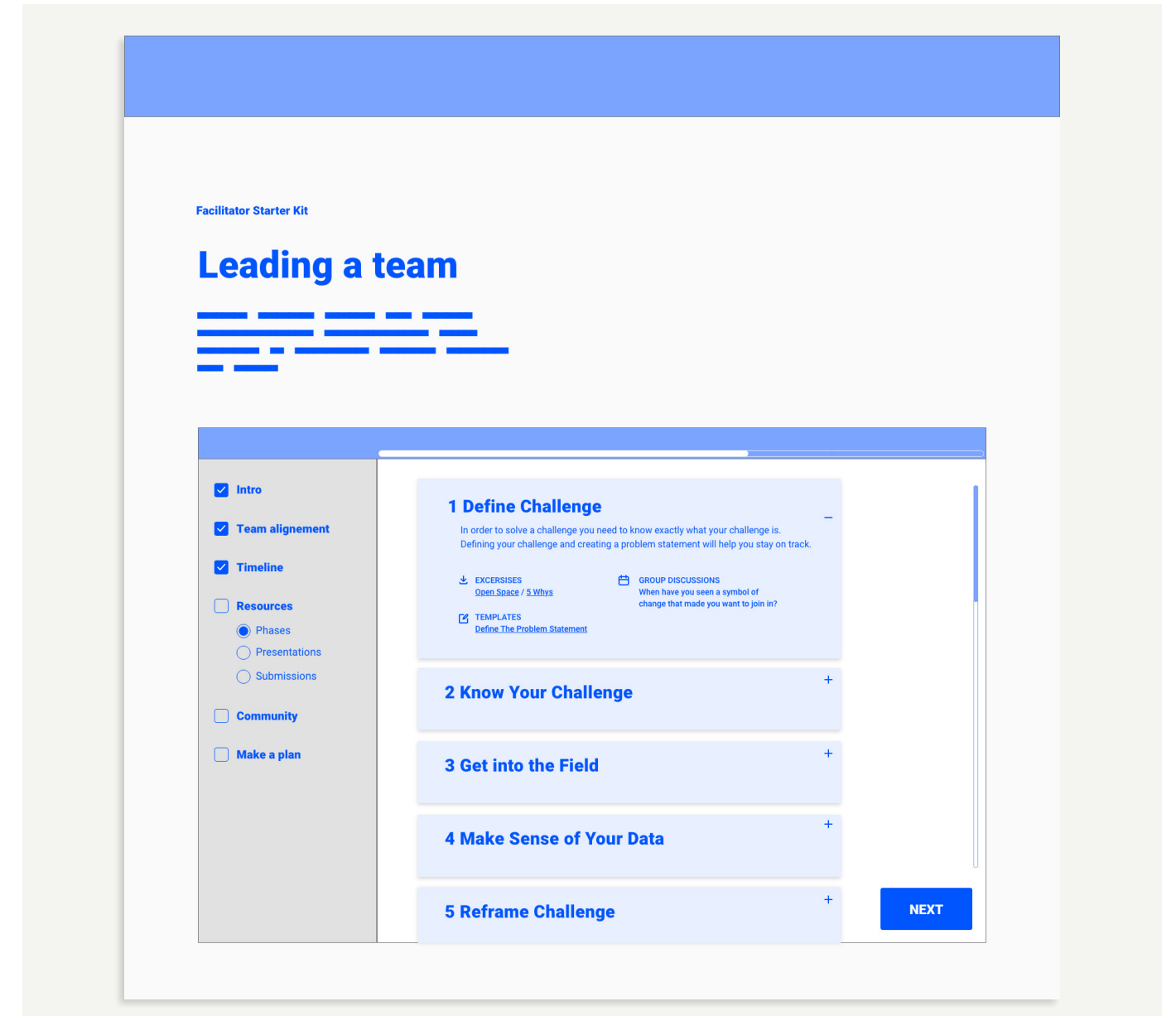
Clicking the button “Start the training”, she is happy to see a video as the first format. *“We are currently working on a massive expansion of video content ourselves. This is not because video is the best format to explain. Actually the opposite. Many of our information is crucial to be read twice, or even more times, but what is lacking in a text only information transfer, is the energy and community that makes us special. We want to mobilise our community having multiple people appear, while working with these videos, so we can show diversity and personalities.”*



Screen three:

Overview of the phases

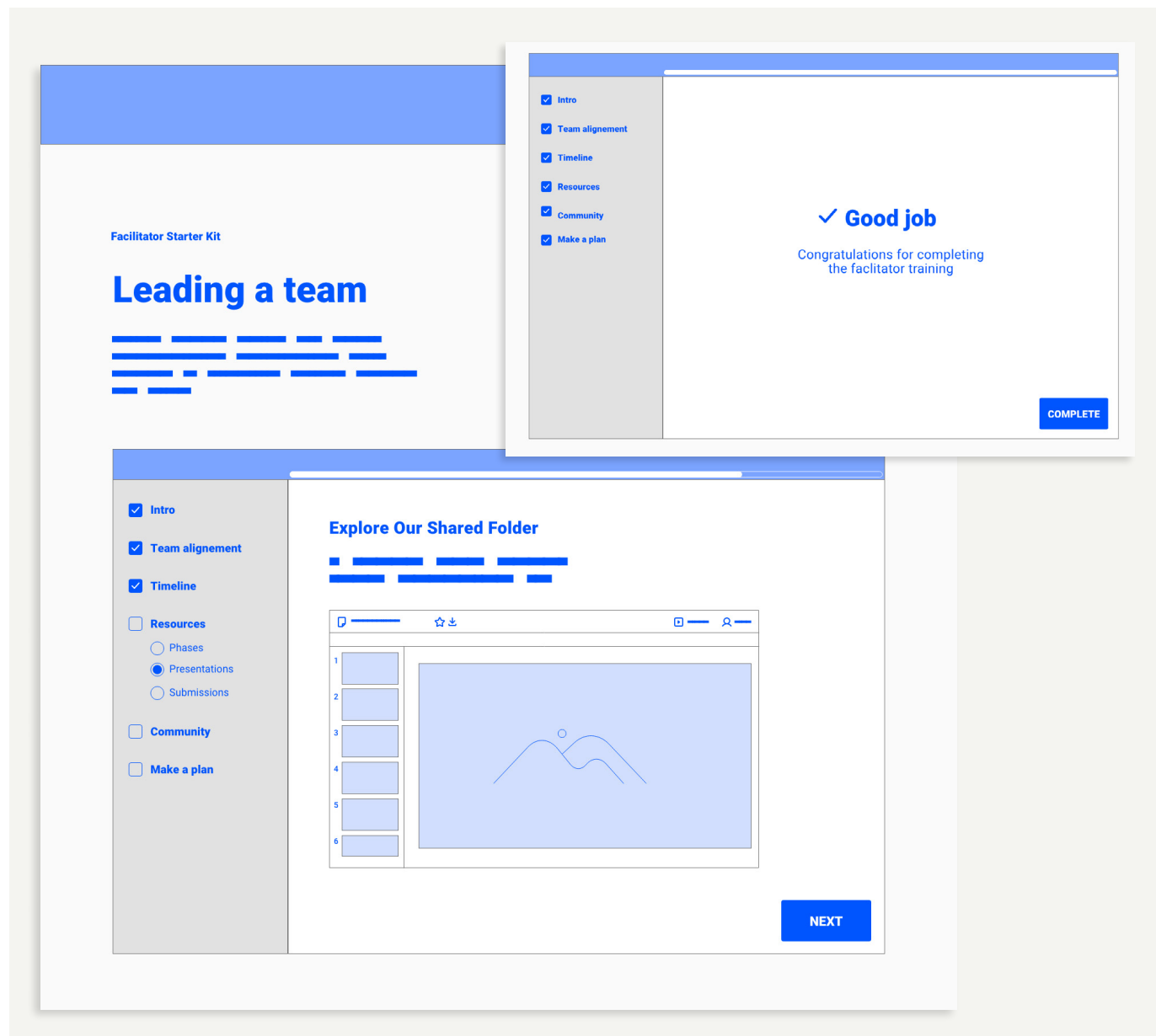
Phases is unclear. What phases? Maybe add the outline in a clearer form first. For the second screen where the overview is presented, she comments that it would be helpful with a bit more metatext. It is clear what it is, and that a pdf or other page will appear to explain something about the methods, but she is lacking why one should click them. Maybe add a layer of “This is for you to get to know the content you will need to explain to the team, and how to understand and this is how we suggest ways to do it.”



*Screen four:**Access the resource folder*

The third screen of presentation of the shared drive folder of presentations makes her happy to see, as it is going to save time for the team, if we can start out with this, and not agree internally how the best way would be to capture it. Maybe it would be nice to know that you should just make a copy, or download it or whatever works for you.

The last closing screen makes her feel glad to see that the preparation is limited and timely, so you know when you did enough.

*Debrief and feedback*

Debriefing about the prototype, she sums up that she likes if it is that the presentations are the actual facilitators, and the person is not in charge of owning the concepts and make the expression and explanations, but that the facilitator just supposed to be slightly more aware of the process then the team at the workplace. She thinks its a big benefit that it is ready to use and can be incorporated fast. Also likes that there were videos and mixed learning formats.

She wished it was more visible if it was also live talks and panels and such. Could be a track that was even more meta to a design thinking process. How to facilitate, keep in mind to ask open questions, and set the rules, ect. She thinks it's important to have even more focus on the training.

She would change the metatext and make more elaborate intros. She thinks the copy should be emphasised that it is suggestions, but encourage the facilitator to take leadership and adapt according to needs. Don't follow the process for the sake of the process, do it as its best in your own company, and take this as an inspiration.

DELIVER

Moving forward after leads us to the Deliver phase in the Double Diamond process. (Design Council, 2015)

Rounding of Develop Phase, with a broad scope of ideas, while moving into the final part of the process, the final phase is all about convergent thinking. In Deliver it is time where it is time to make decisions and use storytelling.

Develep ended with selecting a critical moment in the user journey, that after my assessment would be most critical for the success of all of the further experiences interacting with the service. This was why the Facilitator Training was selected to Deliver in detail, and ended up being the one I choose to zoom into.

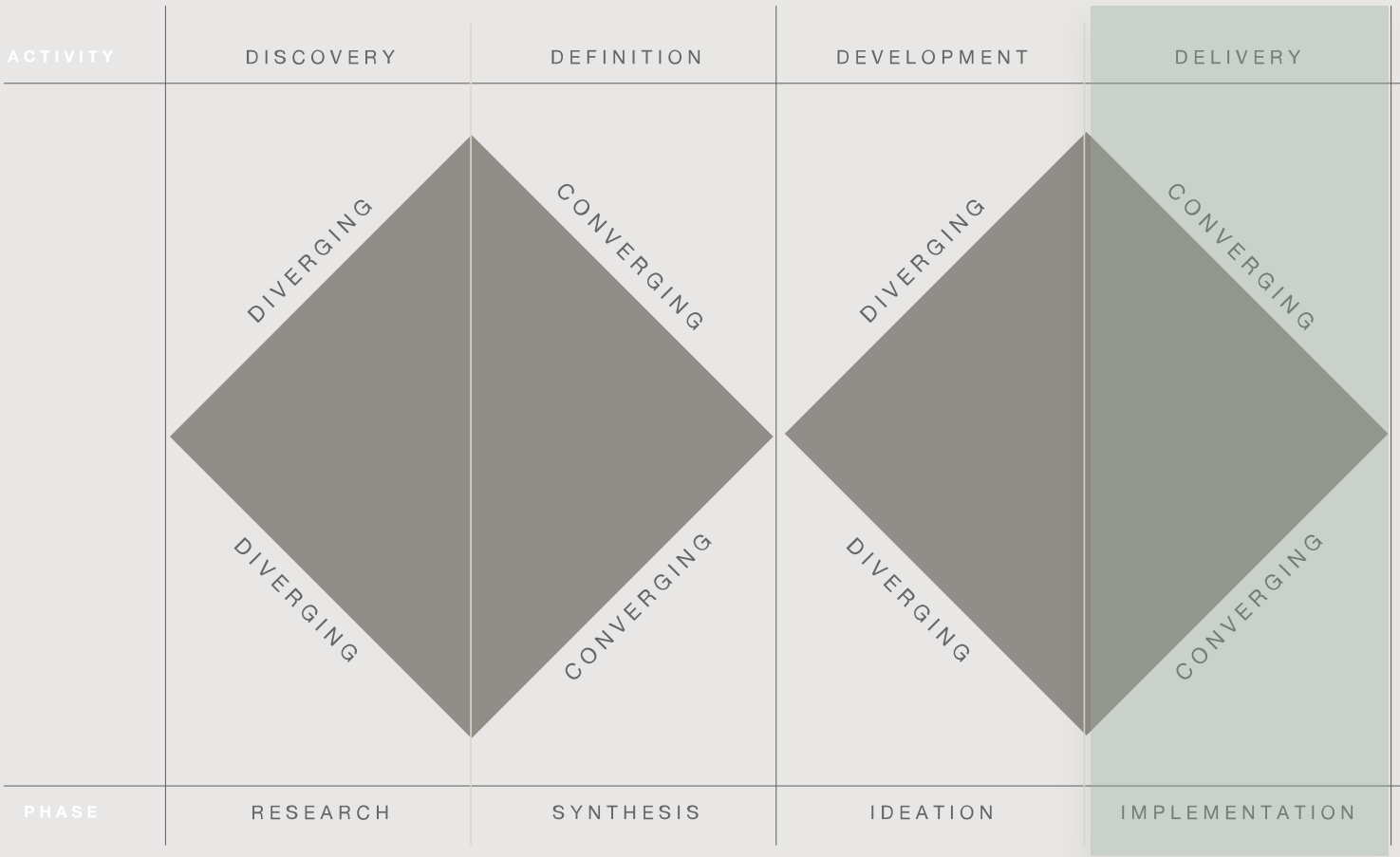
Having the initial Future State User Journey, and the feedback from the alpha prototype test, helped to localise what most necessary screens that were still missing to be answered, and this way the deliver create a suggested way of how the user experience design would be.

Returning to the Service Design theory, the finalising of the solution came to outline the AT-ONE service orchestration method, (Clathworthy, 2011), that was one of the backbones of the development as the chapter aims to sum up the actors, touch-points, offerings, needs and experiences.

To represent the service, a variety of methods were used to describe the solution. One of which was by making a Wireframe Experience Prototype as well as an in detail Experience Map (Curedale, 2018), that was created in order to explain how the user was intended to feel as well as describing the actions.

The final solution suggestion was also described using Value Proposition is described using Stategizers format for formulating a conclusion, as it provides a structure framing the ideas into pitchable sentences. (Strategyzer AG et al., 2010)

Process overview



Solutions finished in the delivery phase



Wireframe Experience Prototype

Wireframing is the discipline of creating a simplified non-brand design drawing to communicate an outline of elements and components shaping the experience and usability of a digital product. This time, they were made on a small selection of touchpoints, in order to communicate the important steps in the user journey, where the participants would interact with The Index Project, across channels and touchpoints. The drawing style was simplified with standard components and icons to explain where and how the content would take shape.

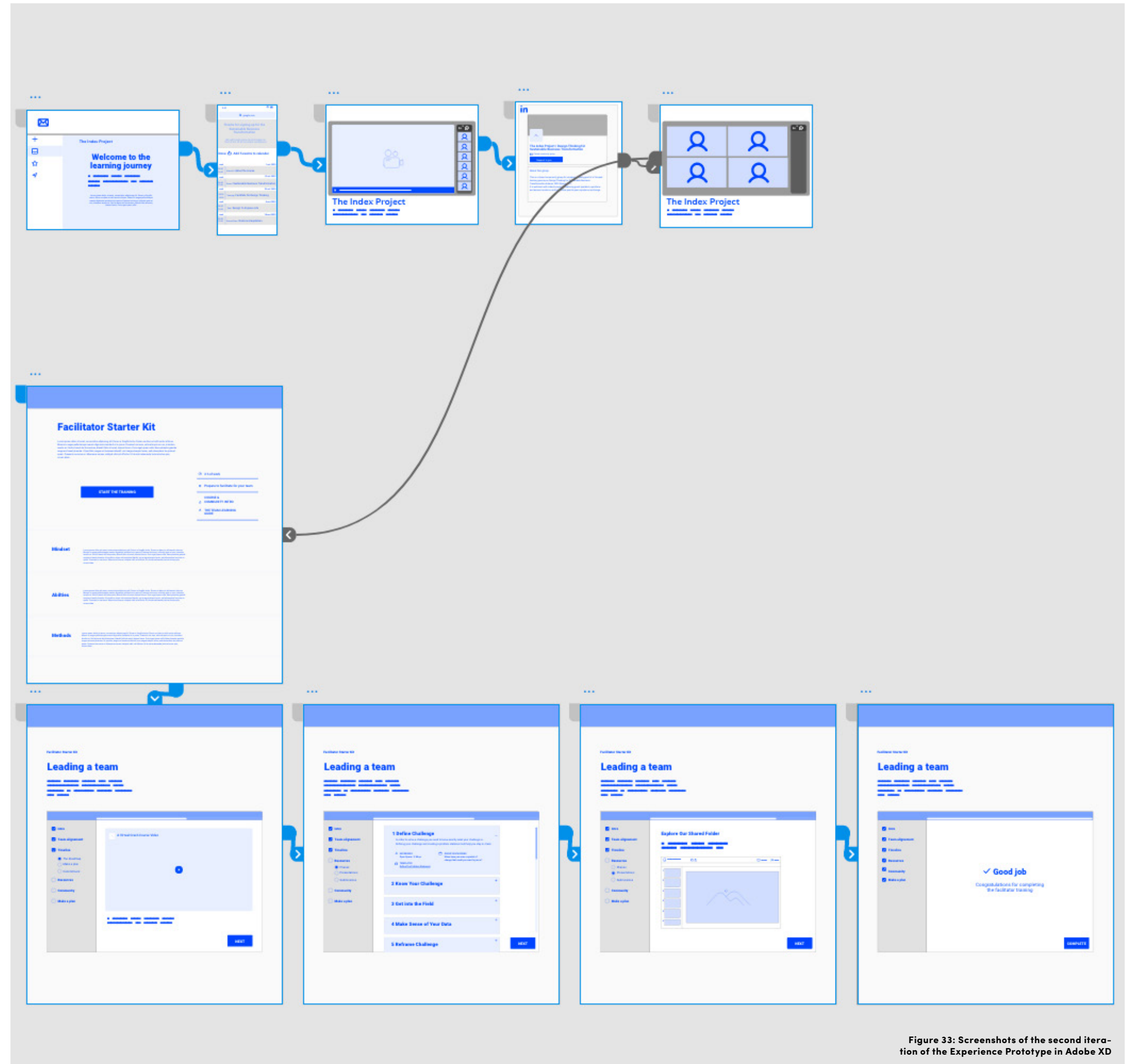


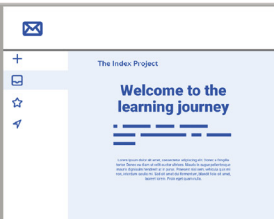

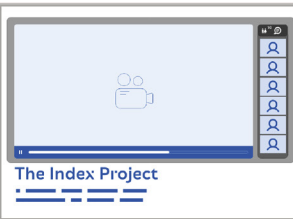

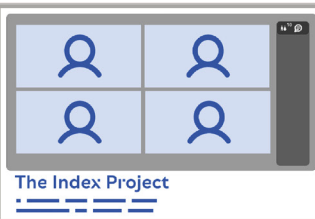

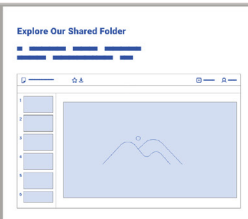
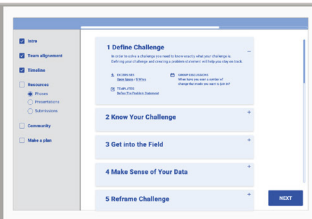
Figure 33: Screenshots of the second iteration of the Experience Prototype in Adobe XD

Experience Map

The experience map is helpful to describe a final solution, as it allows to describe the user experience in concise terms, and giving a multi-facetted picture of how the service should make the user feel and the practical tasks and activities they will have to do. The structure of this Experience Map is inspired by the structure from Service Design Process and Methods, by Robert Curedale, (Curedale, 2018) but could take many forms according to for the needs of the process and requirement level of the technical details.

The main purpose of this visualisation is to get a lively overview of how this short part of the Value Constellation (Stickdorn et al., 2018) would unfold, as well as a good way to activate the wireframes.

THE GROUP ALIGNMENT AND FACILITATOR TRAINING EXPERIENCE MAP

PHASE	Educate							
	Involvement		Coaching / Training		Commitment		Independent work	
EXPERIENCE PROTOTYPE								
TOUCHPOINT	Welcome email	Meeting invitation for webinars	Webinars, with introduction to the mission and community	Linkedin invitation to community group	Breakout Forum	The resource platform	The shared drive folder	Their own company communication platform
USERS ACTIVITY	Goes through on-boarding material and gets acquainted with the outline of the course	Accepts invitation for a kick-off meeting	Attends three webinar training sessions	Accepts invite for the Linkedin community group	Completes the facilitator training sessions and gets a group of other companies they will do the course along with.	They orient themselves in the "Facilitator Training Kit" where they can see the coursework material	Makes copy of the course material folder with templates and presentations to their platform of choice	Creates a plan and invites their own team at their company to workshops lead by them
THINKING & FEELING	Feels curious to know more about how the course will unfold	Feels ease that more information and details will come	Feels empowered after getting to know Index by watching video conference consisting of talks, panel discussion	Feels welcome and sees that it is an aspirational community to be apart off, as the group culture is to check in with short introduction of them self and their company	Feels connected to the and commitment to their group	Feels reassured that there is shared practical know-how and instructions of what it takes to do practice Design Thinking	Feels safe and well prepared for the further facilitation of the work	Feels action-minded and ready to get to the work with their team

The Value proposition

Service Offering **Our** free digital course for Sustainable Business Transformation

Customer Segment **Helps** passionate professionals who wants support when taking the lead at their workplace

Jobs To Be Done **Who** wants to attend a mix of live online learning experiences and gain access to a digital facilitator and resource bank, taking care of all the practicalities of the process

Avoiding Customer Pain **By** being guided while attending from anywhere, get empowered to lead your own team through training lessons, expert coaching, and gain valuable network as you will be paired competent like-minded professionals in open groups

Enabling Customer Gain **And** learn about Design Thinking, using the methodology of The Design To improve Life Compass, that holds all of The Index Projects best tried and tested tools that will empower you to address complex problems and apply your knowledge to achieve impactful results

Competing value proposition (**Unlike** the static and unnarrated tools and courses)

Presentation for The Index Project

The final part of the deliverable, was to hold a two hour presentation for the Index Team, presenting all main findings and ideas I had generated. Their whole team was invited to listen in, and come with feedback. The presentation was presenting the highlights of each chapter, but especially going into detail on trend and competition material, as well as results of the first hand research and the ideas. The scenarios were the main focus to talk about in the presentation, as well as the Experience Map and Prototype of the suggested solution.

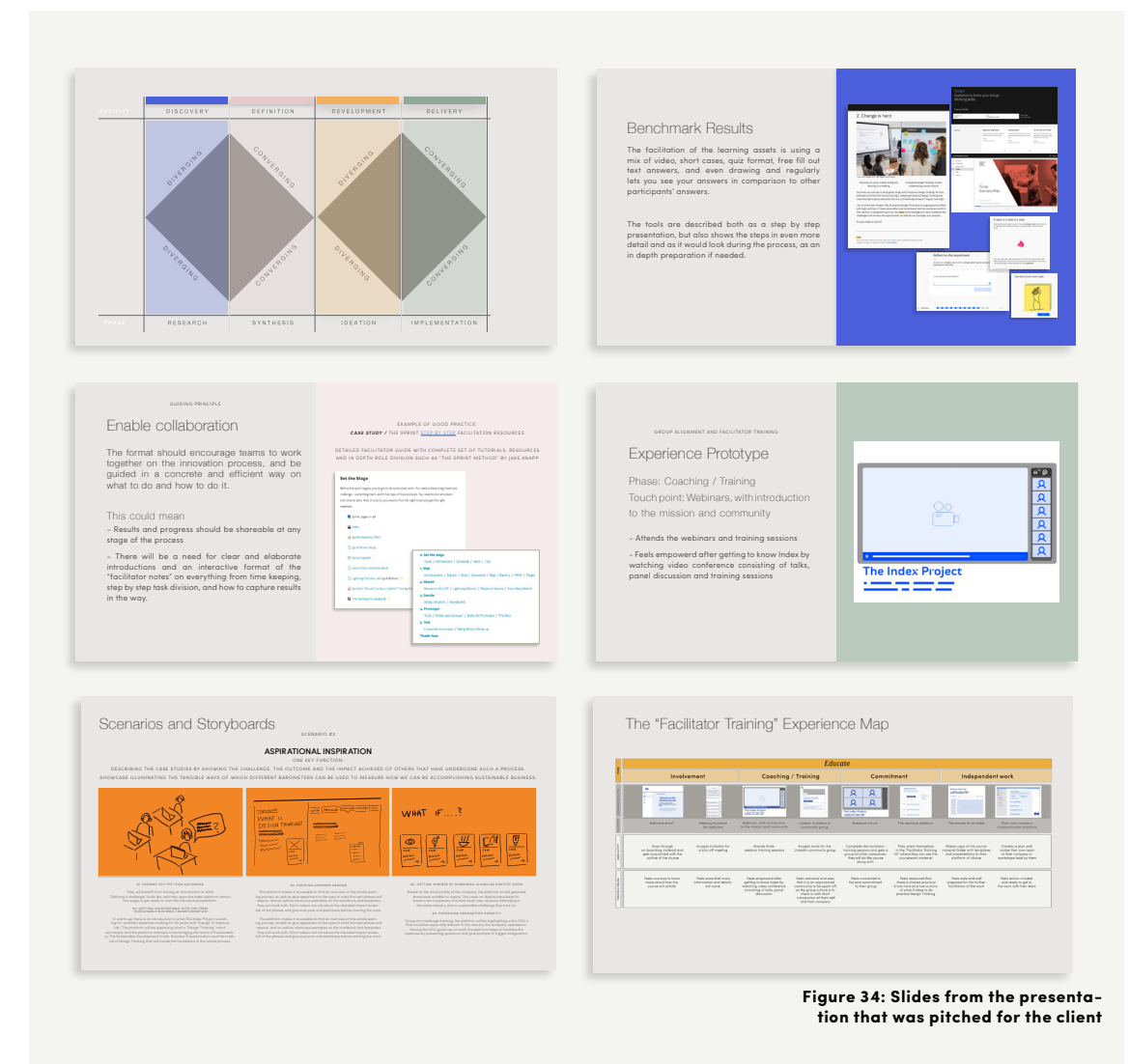


Figure 34: Slides from the presentation that was pitched for the client

FINAL REFLECTIONS

Discussion

CHALLENGES IN THE THESIS PROCESS

Rounding of the master project, I relate to Brian Gillespie when he concludes in an interview about Service Systems Design in the book “Branded Interactions”: “Process is messy. Process is never the same thing twice. Process is an ideal that everybody aspires to.” p.94. (Spies, 2015)

Regardless of careful selection of theory and methods, all organised into a neat project plan, attempting to make my selected process framework Double Diamond Model fit with deadlines, the design process is rarely linear. Sometimes, maybe more often than not, while working we tap in and out of the Divergent and Convergence mindsets more fluidly. I attempted to use the framework as my outline for the master thesis, well aware the process might be more fluid with time, but quite how fluid and challenging it would be was unimaginable, as the whole state of the world was changing due to the COVID-19 circumstances.

Despite following the Double Diamond process for structuring the design process, as it almost always is, the process was nonlinear and iterative. Whereas many of my planned activities had to be changed, the main areas of investigation, being Digital Facilitation and Remote collaboration, seemed to become the most relevant topic of peoples worklife worldwide. As this became the reality of everyone due to the lockdown, and the master work and design process was happening in dynamic flux with the unstable situation of the entire world. I got the rare opportunity to watch change happening real time, as the crisis led to the rapid dig-

italization of the everyday activities, which we never considered effective to gather around digitally, quickly has become the norm and new reality across the world.

REFLECTIONS ON COLLABORATION AND STAKEHOLDER INVOLVEMENT

Everyone’s reality and long-term goals are made fluid due to the extreme uncertainty in every industry. Where as in the beginning of this process, my role was being an employee of the design studio, Trouble, holding a student position as a UX designer, that has The Index Project as a client using their expertise knowledge on digital products, everything was set to have a serious and close collaboration, both internally with team members from Trouble, such as Senior Digital Designers and Creative Directors. I was also anticipating a regular and formalised opportunity to check in and align with the team from The Index Project.

However, by the end of the Define phase, at the point where we were supposed to collect all the loose ends about to finally manage to gather the stakeholders around a well-rounded scope of work, where each member of Index team and Troubles team had a clear division of tasks and responsibility moving further. By the middle of April, Index board of advice, decided that all work on this project was to be stalled and immediately moved the project from ideation and prototyping stage onto pause until further notice.

This meant that I a service and UX designer, that

instead of going into Development and Ideation phase after the already delayed team kick-off meeting April, were in total eleven key stakeholders were present and agreeing to work actively with this digital facilitator, I suddenly was on my own without significant support or available partners, from either side.

Plans and meetings for testing had already been arranged, with the help from Index, utilising the same network they had mobilised doing interviews in 2019, was partly cancelled, as there were no longer resources to spend doing this.

Due to the lockdown in society, and the following restricted access to participants to be holding workshops and ideating with, both in the internal team of the stakeholders and other relevant participants, it is important to carefully determine when to invite people to participate in a remote session.

Challenges with recruiting qualified participants with remote conditions for fieldwork As a way to combat the challenge of being isolated in the Ideation phase was to invite for an online remote workshop of idea testing and prioritization session. This was made possible with the help from the team at the Index Project, that recruited five test companies from their network to give feedback on the early ideas.

Due to the remote conditions of society, the session was conducted remotely, leading me to facilitate the workshop platform Mural, accompanied by a video conference at Google Meet. The workshops were condensed to last one hour to keep on-screen attention span, as energy flow is affected with both the facilitators and participants being at remote workplaces.

The takeaways from working with my own theme of investigation, allowed for some meta reflections on what worked and what did not. One of the challenges with remote facilitation is that it is easier to ask good follow up questions when workshop participants are in the same room as you where the facilitator can be

aware of nonverbal communication. However the remote facilitation also had some benefits as the two observers from the Index team were quickly forgotten about, as they were simply muted and able to take notes, without participants being reminded of their presence. This way the observers avoided interfering in the conversation as one would if we were all gathered in a physical room.

Another problem with digital meetings, is that my experience showed it was easier to dodge appointments, if the interaction did not directly give value to the counterpart. The workshop was booked with participants within The Index Projects network, and scheduled months before the session took place. There were initially four companies within the SME sector in Denmark that had agreed to join the workshop. On the week of the meeting taking place, two of the companies cancelled the workshop, due to more urgent matters to attend to in the COVID-19 circumstances. This could not have been anticipated when they agreed to spend time to help in February.

This led to the workshop being conducted with only two of the companies, although they are both solid and aspirational cases, as both companies are known for working with outstanding results and being awarded and certified because of their efforts within sustainability in business transformation. This resulted in a limited variety of input, and is likely to have affected the concept development, as the data I got to collect ended up being so narrow.

The workshop was also conducted with two other companies that I found in my own network, but after careful consideration this data was not used, as the validity of these companies was weaker, as it was not Danish SME’s, and it was conducted with people in less influential positions, therefore due to further reflections, I concluded that made it uncomparable datasets.

REFLECTIONS ON WORKING WITH SERVICE DESIGN PROJECT IN SOLITUDE

Returning to the introduction of the field of service design, I want to look back at the quote from This Is Service Design Thinking. “It (service design) should be User-Centred, as in experiences from the customer’s eyes. Co-Creative, as in involving and mindful of all stakeholders. Sequencing, as in visualised as a sequence of actions in a certain period of time. Evidencing, as in visualized in physical artefacts. Holistic, always regarding the greater environment of the service.” (Stickdorn & Schneider, 2011)

The discipline of service design is known to be highly collaborative, always looking to leverage the knowledge of diverse teams. Going into the thesis project, I chose to do it alone, but did not imagine doing it in solitude. The first phases of work, when I was located at the Trouble HQ there was a lower bar to approach a peer for feedback. Being isolated and unable to have spontaneous feedback and collaboration with colleagues, hundreds of otherwise very valuable informal and underway interactions, making me feel like the process of the thesis was not an ideal one. For the future, I see great value in some of the solution remote collaboration formats the research suggested, of gathering in digital rooms for peer-to-peer interaction, as I see that one could benefit from setting people up these kinds of network groups, where there would be mutual benefits being able to ask for feedback and sparring, and have informal discussions if meeting regularly.

OPPORTUNITIES AS DIGITAL CONVENTIONS ARE EVOLVING

For the future, the broad and sudden adaptation of remote collaboration gives opportunities for the concept and nature of a learning journey and course taking place digitally, as the society has been forced to go into a mainstream adaptation of digital tools, softwares as services, and the mediums and features of our everyday most used services, that to most was previously unfamiliar way of working and interacting with

others.

Returning to the literature exploring how to make people shift from a passive to active mindset in terms of sustainable change, Thackara concludes his book with the system thinking approach that all ecosystems are both related and interdependent on each other and that all natural phenomena are connected directly to us. He argues that in order to reconnect with the embodied, ecological way of utilizing the collectively gathered experience and knowledge, we need to reconnect on a social level. “Change is more likely to happen when people reconnect – with each other, and with the biosphere – in rich, real-world contexts ... Given what we know about the ways of complex systems – including belief systems – change, my confidence in the power of the Small to shape the Big remains undimmed.” p.168 (Thackara, 2015). His extraction is that we need to talk to each other more, we need to connect and encounter in a community to embody the knowledge we have to make change happen. With this in mind, the mission of the project case seems worthwhile and important to help empower.

Conclusion

Looking back at the starting point for the project, the problem statement wanted to find out how The Index Project could democratise their tools and resources, making a digital platform as the vehicle of change for sustainable business transformation.

The first phase of research showed that Index saw the mission to provide a process that could provide structure to sustainable change at the workplace. The conclusion of the conference workshop was that participants related and could name the challenges holding the workplaces back from changing their practices, and instantly they used their experiences to co-create ways to work around the challenges currently blocking the change. The main takeaway was that a focus area should be to find a way to spark these conversations and ignite action-mindedness out in the real world.

Reframing the problem in the synthesising phase, the goal became to empower workplaces and facilitate sustainable innovation processes remotely, and focus was put on how to make a platform fit to facilitate and motivate across differences in the businesses challenges, ambitions and commitment levels to the processes.

Exploring and defining guiding principles for the project, while considering trends and best practices, the exploration found that there were two main directions of how digital facilitation was conducted. One was serving the need for methodological understanding and teaching new information and providing knowledge, and the other purpose providing methods and process mediating, giving practical how-to guidance.

Holding this findings, ideas were generated to serve both needs, and then iterated with the help and input from representatives from the target group. Testing ideas with the target group concluded that they seemed to imagine one part of the process to be trained and inspired in what sustainability could mean for companies, and one being the actual company related work. They both emphasised the importance of reassuring the company that they have been set up in a group of companies with similar challenges and aspirations, and wanted Index to facilitate for a safe and challenging community, enabling feedback, sparring and collaboration.

Concluding remote facilitation and digital facilitation for The Index Project, should mean setting up virtual meetings for sharing their expertise, still with focus on human connection, just even now more broadly available moving the teaching to the remote format. My research concludes that the connection, collaboration and shared energy of the creative processes is what is needed to make people engage and participate.

Therefore the final solution is proposing the digital platform to be targeted one user per company, training them to become a confident facilitator of Sustainable Business Transformation. The platform should be a place where they can find resources, but most importantly be guided in methodology and mindset. The digital platform can serve the users by making their work easier by providing the resources and this way being a convenience hub, however, the crucial thing is that the person meditating a process is facilitating the use of The Design Thinking Compass is doing so convincingly and feeling safe.

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