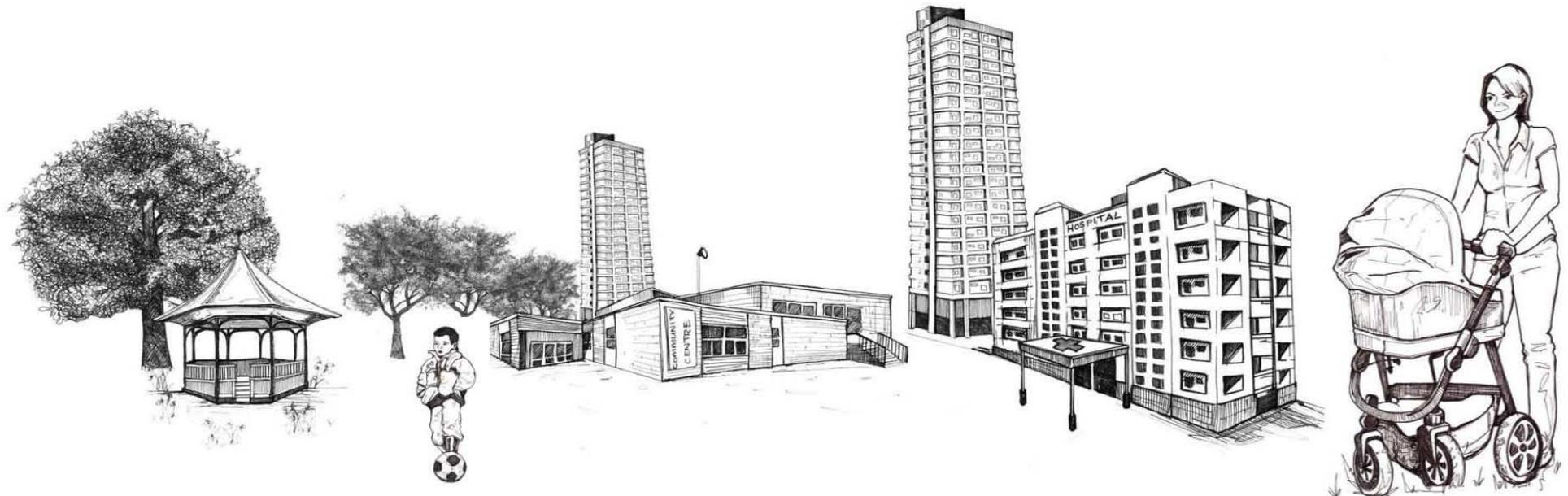


# THE SOCIAL DESIGN METHODS MENU

In perpetual beta

Lucy Kimbell and Joe Julier



## INTRODUCTION

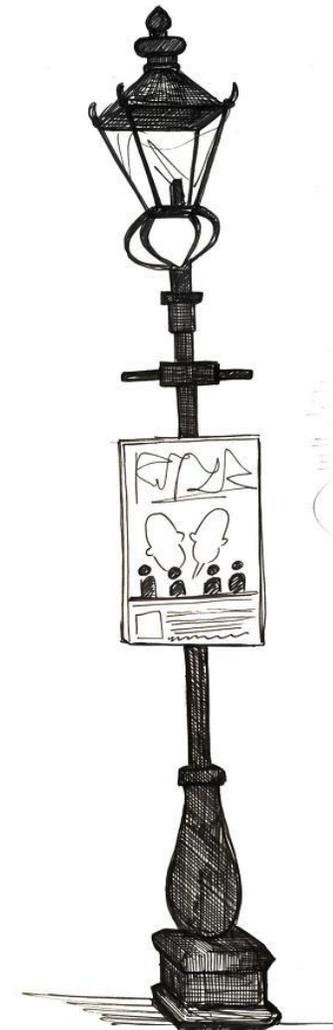
This document summarises the main approaches and methods developed over several years through teaching and supporting managers and entrepreneurs. It is something to **read** and something to **use**.

It provides an introduction and manual for those looking for a new way to tackle social and policy issues, such as caring for the elderly or reducing worklessness among young people.

What we call this, whether it is “social design”, “service design” or “human-centred design” isn’t that important – the approach and methods are. But, if you want a definition of social design, the one we offer is this: A practical learning journey taken by people including managers and entrepreneurs, to create useful, usable and meaningful ventures, services and products that combine resources efficiently and effectively, to work towards achieving desired outcomes and impacts on society in ways that are open to contestation and dialogue.

This approach starts with spending time understanding people’s experiences and resources *on their own terms*, taking methodical steps to analyse and address these with their active participation, and pushing for more effective cross-team and cross-organisational working. With this services can become more valuable to customers and users, easier to use, with fewer resources wasted on implementing the right ideas in the wrong way (or on the wrong ideas entirely). This Social Design Methods Menu cannot take you all the way through this process, but it focuses on the difficult early phases when uncertainty is high. Try them out, reinvent them and let us know how you’ve adapted the ideas for your own context.

Lucy Kimbell, October 2012



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# BACKGROUND



## **WHY USE A “DESIGN” APPROACH ?**

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1. Although you might not think of yourself as a designer, the chances are that you design every day. People working in all sorts of contexts, as managers, activists, receptionists, or volunteers, are involved in creating new ways of doing things in the organisations they work in. Becoming conscious of this and paying more attention to how you develop and try out new ideas can make a real difference, turning good ideas into revolutionary ones. However, to move from silent design to conscious design requires tools and guidance – this is what we aim to provide. (And we don't claim this document replaces working with people who are skilled and knowledgeable in using the approach we describe.)
2. People's lives continue to change, as new technologies and new behaviours spread and become the routine and external conditions change. This means services and solutions that worked well a few years ago may not be right for today. Because design is focused on the creation of new things (products, services, interactions, systems, environments...) to serve particular purposes, exploring the skills and knowledge of designers is a great way of beginning to address these changes.
3. Against the backdrop of economic uncertainty, service providers and policy-makers as well as activists are all faced with the question of how to do more with less, and increase user satisfaction and improve outcomes at the same time. The approach we advocate strives towards meaningful and effective change, by reconfiguring resources in different ways.
4. Many organisations do things that lead them to forget their core mission – serving people. Designerly methods provide a way for working together as a group in a productive way that is centred on the people you work with and the outcomes you are trying to achieve.
5. Trying out a different approach provides space to think about complex issues outside the typical constraints of organisations. Innovation rarely comes from looking at the same things the same way.

## **THE SEVEN HABITS OF SOCIAL DESIGNING**

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1. Tell stories and make maps
2. Work at human scales and connect across networks of people and things
3. Look at both the detail and the big picture
4. Make things to explore, test and learn
5. Imagine scenarios of use, and provoke and inspire alternatives
6. Make the familiar unfamiliar and the unfamiliar familiar
7. Create designs that are based on the ways people actually do things, rather than focussing on what people say they do, or what other people think they do

## JUST ANOTHER TOOLKIT?

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There are already several toolkits that share designers' approaches so that non-designers can use them. Examples are IDEO's Methods Cards, the SILK Method Deck, the NHS EBD tools and related initiatives such as Arup's Drivers of Change cards. What the Social Design Methods Menu does that is different is three things.

<http://www.ideo.com/work/method-cards/>

[http://www.institute.nhs.uk/quality\\_and\\_value/experienced\\_based\\_design/the\\_ebd\\_approach\\_\(experience\\_based\\_design\).html](http://www.institute.nhs.uk/quality_and_value/experienced_based_design/the_ebd_approach_(experience_based_design).html)

<http://www.driversofchange.com/>

<http://socialinnovation.typepad.com/silk/silk-method-deck.html>

**First**, we think that tools are not simply things that people use. Instead, we think that tools have the potential to change who we are and how we work. So we know our templates will be changed as you try them out, and so might you be too, as your teams and participants experience using these approaches.

**Second**, a characteristic of this menu is the interweaving of ideas from design, but also management disciplines and the social sciences. Rather than advocating an approach that suggests that designers have the best things to offer social innovators, we mix up useful ideas from other fields. We emphasize ways to make these methods do-able in real organisations where resources are stretched, attention is limited and leaders have to weigh up the risks of trying out something they think is unproven.

**Third**, the emphasis you'll find here is on the often hidden work of change – involving people in meaningful not tokenistic ways, explaining how *this* initiative will be different, and persuading people to commit resources. A tool or method comes to life when it's being used and when its effects start changing how people work. This is skilled work requiring an ongoing recognition of change, distributed leadership, and a tolerance of ambiguity and uncertainty.

## THE INGREDIENTS THAT MAKE UP THE SOCIAL WORLD

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**People.** Humans. Men, women, children. Users, participants, members, citizens, beneficiaries, employees, activists, stakeholders, workers, staff... Often somehow ignored in designing services or represented by people who speak for or interpret others.

**Depending on your lens**, to understand people you might use terms like:

- Attitudes, motivations, behaviours (cognitive and behavioural sciences)
- Meaning, affect (feelings), values, identities (anthropology and sociology)
- Norms, social classes, groups (sociology)
- Things and people having agency because of being connected through networks (science and technology studies)

**Things.** Material and digital things and the living habitats in which they encounter one another. Two kinds of things are especially important within social design.

**1. Touchpoints** – the things that users and volunteers, staff, and family members and neighbours come into contact with as they interact with organisations, and the spaces where they happen.

**2. Boundary objects.** Things that people create when working in groups or teams to design a new service, that help them do their collective and individual work.

**Depending on your lens**, you might see things as passive objects outside us, or active participants in making up the social world.

**Organisations.** Teams, committees, statutory bodies, voluntary or community groups, small or medium-sized businesses, global corporations, virtual organisations...

**Depending on your lens**, you may see organisations as:

- Clearly defined structures with agreed responsibilities, roles, rules and procedures
- Entities for the creation and exchange of value
- Collections of people and things that hang together through interactions, where the boundaries between organisations are fluid and dynamic

# HOW TO...



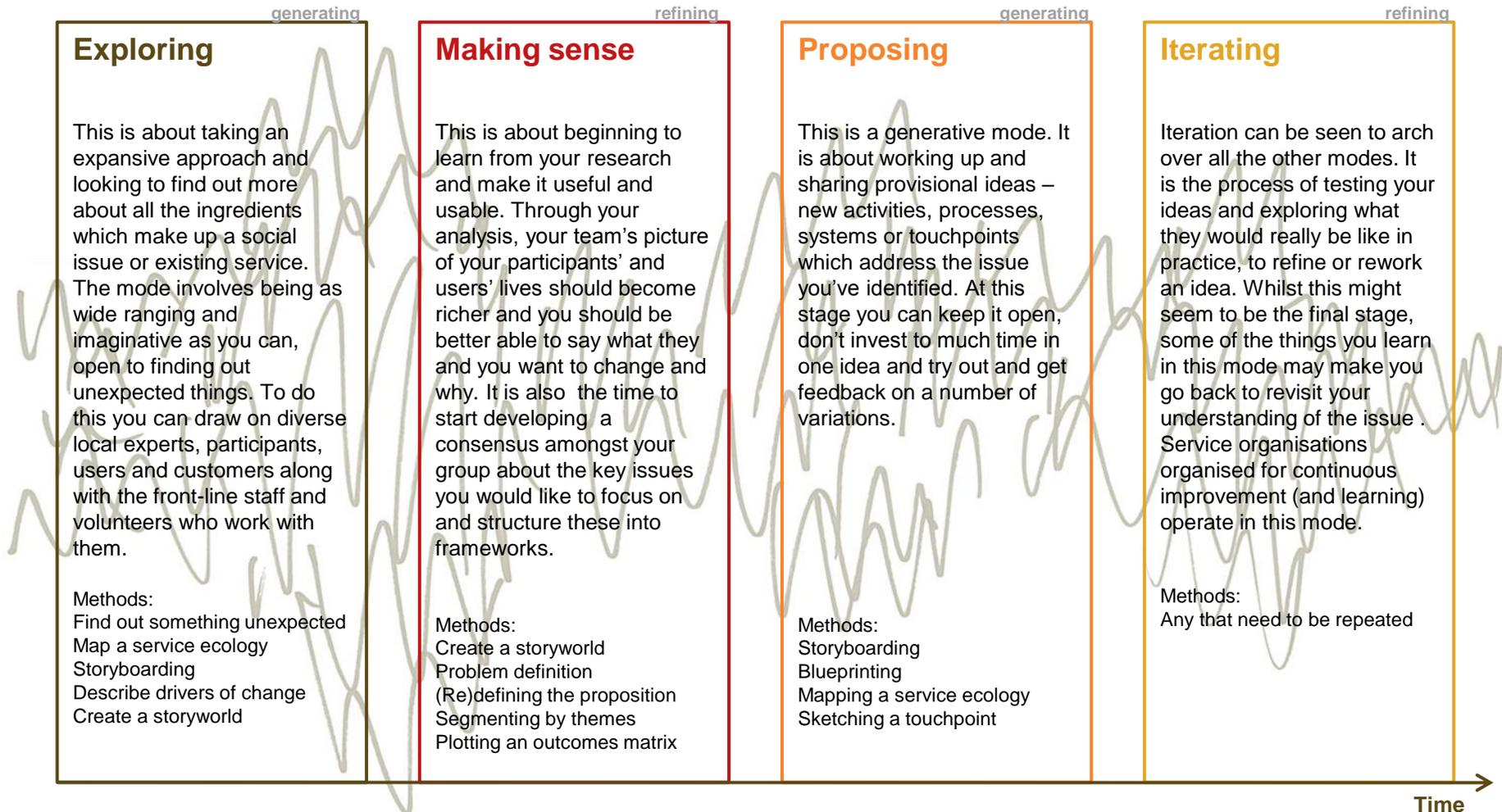
# MODES AND METHODS

Some designers talk about a “design process”. We think it’s helpful to separate out the **modes** that shape the way that specific **methods** can be used in a learning journey when creating something new. Sometimes people prefer to call them “phases” but this can sound too linear. Designers and researchers have created many different models to try to make sense of what goes on during designing. Here we borrow and adapt the work of many other people.

In our practice we identify four key **modes** which we occupy when developing a venture, proposition or service. These are: **exploring**, **making sense**, **proposing** and **iterating**. The modes are intended to be guides, rather than being restrictive, so don’t worry if you see things differently. Generating a sense of structure and linearity can be an important way to facilitate people and organisations to move together on a learning journey to create a new venture, service or product. You might have to fit within an existing organisational process, or you might have the freedom to create your own.

With this in mind we have produced three visualisations. Number one lays out the **modes** in a clear, linear manner and connects them with particular **methods** in this menu. The second offers an opportunity to connect the **modes** with some more familiar questions which you might ask when developing a venture or service. The final visualisation tries to capture the complex and messy way which we have discovered the **modes** and **methods** play out in practice.

## THE FOUR MODES – LINEAR MODEL



## KEY QUESTIONS FOR PARTICIPANTS IN EACH MODE

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	Exploring	Making sense	Proposing	Iterating
	<b>What is?</b>	<b>What matters?</b>	<b>What if...?</b>	<b>What works?</b>
<b>SERVICE USERS, STAFF &amp; VOLUNTEERS</b>	What are things like? Why are they like this? What goes wrong and how and why?	What matters, to who, and why? What is the change we want for ourselves?	What could be? How could things be different? Are our resources part of the solution?	What do the ideas mean for us? How can we be involved in designing, prototyping and assessing ideas?
<b>MANAGERS</b>	What are the needs and resources among users, customers, beneficiaries and staff? What do our data tell us? What don't they tell us?	What's the problem and what solutions combine resources and assets? Who will prioritise what matters?	What are the characteristics and implications of different solutions? How could they be operationalised?	What do the ideas mean for staff and resourcing? How do we keep to time, quality and budget and still do something valuable and new?
<b>LEADERS &amp; ENTREPRENEURS</b>	What's the best way to engage and inspire people in the change process? Where are the opportunities and issues?	How can the team move forward and make the most of resources? What will support a focus?	How can we keep ideas flowing and people engaged while working towards clear outcomes? When to fix a design?	How do we keep people excited by and open to repeated cycles of learning and experimentation?

## THE MODES IN PRACTICE - LOOPY MODEL based on a real project



## **SOME SUGGESTIONS ON HOW TO USE THE METHODS...**

These methods can be used in a number of ways. At the back of this publication, we suggest some distinct **recipes** and recommend how they can be used in relation to one another in sequence for particular purposes. Whilst some methods work well together, you can also just try out one or two. It depends where your project is at, the mode you are within, and on you and your colleagues' personal and professional backgrounds. We recommend adapting them to create your own methods, using your own terminology and phases of engagement with customers or users.

Often, when a new service or venture is being proposed, there is an assumption that a clearly defined issue exists which the whole process can pivot around. This is rarely the case, so you can use our **Problem Definition** and **Proposition** templates to push your thinking. These fit well within the **making sense** mode. You should be able to divide up the groups you are aiming to work with (users, customers, or participants) by **Segmenting by Themes**. You can use the **Outcomes Matrix** to link outcomes you want to work towards for specific target groups.

If you don't yet have a clearly defined issue, you might use the methods to try and encourage a different approach in your team. Ideally you will commission research or at the very least aim to **Find out Something Unexpected** to learn how people do things and the meanings this has for them, and where important controversies lie. You could articulate the **Drivers of Change** shaping the wider environment you are working in, taking a broad view, looking at everything from changing socio-cultural patterns to technology use and climate change. Or you could use the **Storyworld** and **Storyboard** templates to get a group of colleagues and ideally service users and stakeholders to explore someone's actual lived experiences of day to day life, and of engaging with your service or venture. Or you could use the **Service Ecology** method to visually map all the assets and resources around your organisation, its customers, users and partners. These all fit within the **exploring** mode.

When you are in the **proposing** mode, this is where creative methods take off, supporting people who may not think of themselves as designers and who may not be good at drawing, to come up with new ideas. Asking people to spend 20 minutes individually **Sketching Touchpoints** (such as posters, forms, letters, websites, or apps) allows many people to generate and share their ideas which you can then harvest. You can also draw storyboards based on the **Storyboard** template, or use the **Blueprinting** template to explore how specific experiences connect with organisational resources behind the scenes. You could use the **Service Ecology** method to help a team trigger new connections between ingredients that might not exist at the moment.

Finally, when you are within the **iterating** mode, you may find yourself using many of these methods again – learning in more depth about participants and their lives, creating mock-ups of service touchpoints and seeing how people respond to them and try to use them. We are not able to cover all the different ways you could prototype and explore the implications and meaning of your ideas, but there are other resources available to help you do this. From using our templates, we know that **Blueprints** will become much more detailed as you walk through different scenarios for specific kinds of participant or user and imagine or draw how their specific needs make requirements of resources or, in contrast, disable them as active participants. If you have another go at **Sketching Touchpoints** and sharing and reviewing your ideas, you'll continue to generate and refine your proposition. By referring to your **Outcomes Matrix** you will bring an important focus on the changes you are trying to work towards.

## **FOR LEADERS AND MANAGERS WONDERING, WHY BOTHER?**

We know these templates are not relevant to all organisations or projects. For leaders and managers seeking a complete solution, this is not it. Hence our use of the word “design” in the title which emphasizes the *early* cycles of research (exploring and synthesising), creation (proposing) and prototyping (iterating) that are part of the “fuzzy front end” of new service development. Once your issue is clear, and you know what matters to the people you are targeting, and your proposition hangs together, and you’ve had input from the people who can help you understand what it would really mean in practice, then your design is more stable and you can begin to work with management and business methods and tools to ask other important questions. So we don’t dwell here on how you can prototype aspects of your service or venture – you may need specialist help for this. And there are many other resources to help you further develop your thinking such as The Young Foundation’s Social Business Model Canvas will help you describe and iterate the business model(s) underlying the proposition.

People working in large organisations will have established processes and practices that must be engaged with (or possibly side-stepped...). We advocate starting with a deep and considered understanding of the worlds in which people live and articulating the changes they and you desire (the outcomes) as the drivers for your service development work, instead of starting with existing ways of doing things, or letting financial models drive service models. Business models are important - but we think the service experience model should drive the business model, not the other way around.

So these methods and templates are not the only ones to use, but we believe the ideas embedded in them are some of the most important. They are *not* going to help a team work out in detail how to resource or cost a service, define measures to determine if it’s achieving its aims or create role descriptions or describe detailed training needs. But if you are able to involve colleagues who work in finance, HR, or IT in your workshops, their expert knowledge can help generate ideas and see what they might mean in practice. Being clear about what mode you are working within will help the team understand where they are in the learning journey you are on.

## **HOW THINGS MIGHT MATTER DIFFERENTLY TO YOU IF YOU ARE...**

**Someone who likes to get stuck in.** You can start almost anywhere – you are oriented towards learning through doing. But the methods we associate with the exploring mode might be a good place to start – trying to find out something unexpected about the people you want to support or work with, especially if you think you know them well already. You'll also enjoy the iterating mode and its emphasis on trying things out.

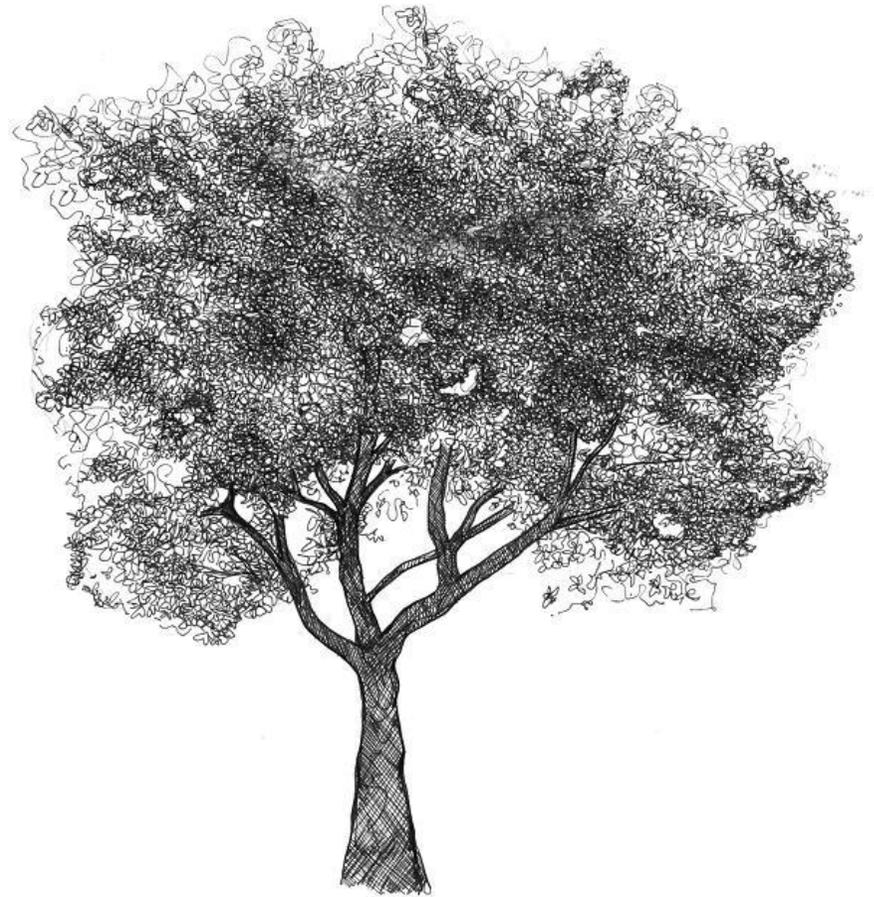
**Someone who wants to understand ideas before you start using something.** We know our templates are not going to be relevant to all organisations or projects, so we recommend using them to create your own, using your own organisation's terminology and concepts. Have a look at some of the other reading and videos we suggest at the back. Compare these with your own ways of approaching change and design.

**Someone who has leadership responsibility.** You may want to know that these approaches and methods work before you invest in them. Depending on your leadership style, you may see the distributed creativity they enable as an opportunity for your organisation or team to try out working differently, and engage productively with uncertainty.

**Someone who is a junior member of a team.** You may not yet have much ability to influence things, but you can see these methods as a way to do two things: develop your own learning and skills, and also support your team and wider organisation achieve its goals more effectively. Suggesting that your colleagues try out some of these methods can help you to do both.



# THE METHODS



# METHODS

The methods we include here have been developed and refined through many hours of use through introducing them to managers and entrepreneurs at Saïd Business School and in many of The Young Foundation's partners and ventures. Our work has been inspired by and is in dialogue with projects and publications by DESIS, Participle, Engine, livework, MindLab, TACSI, ThinkPublic, NESTA, the d-School, OpenIDEO, SIX and many others.

The order they are presented in is not random, but, as with the modes, don't feel constricted by this. These methods might seem difficult, unnatural or unclear at first, that's fine. Any uncertainty could offer a valuable opportunity to personalise the method to your organisation and its stakeholders and audiences and their needs. Remember that depending on the mode you are working within, these methods might play out differently.

<http://www.desis-network.org/>

<http://www.participle.net/>

<http://www.enginegroup.co.uk/>

<http://www.livework.co.uk/>

<http://www.mind-lab.dk/>

<http://www.tacsi.org.au/>

<http://thinkpublic.com/>

<http://www.nesta.org.uk/>

<http://dschool.stanford.edu/>

<http://www.openideo.com/>

<http://www.socialinnovationexchange.org/>

## METHOD 1: FIND OUT SOMETHING UNEXPECTED

### Purpose

If you are not able to commission ethnographic research, this quick method can help you learn more about the people who you designing a service with/for. Whilst you might decide to learn more about a user or beneficiary's experience, we also encourage you to think more widely about other people in their lives or localities, and also about frontline staff and those working behind the scenes who might play important roles in an organisation or service.

### How to do it

Leave your computer and leave the building! Think of this as fieldwork, inspired by an ethnographic focus on people's day-to-day lives in their own surroundings. Do an open-ended interview to find out about someone's daily life. Shadow a service user or staff member, and take photos of what touchpoints and people they interact with (with permission). Ask people to take their own photos or videos about things they are drawn to, and share them with you.

### Outcomes

Looking into people's lives might appear ordinary but this close attention is rewarded once you stop to look and listen more closely. The findings from your research give you "rich pictures" and can uncover unexpected controversies.

Sharing the findings brings some of the texture and tension of real life into the design process. They tell you something about what is going on – but they can also help point out how partial this knowledge is. Having found out something unexpected, discuss what surprised you.

Finding ways to integrate your insights and learning throughout your development process keeps people's experiences live in the project which is especially important later when you are iterating your ideas and trying to assess what they might be like. Using video and images will allow your team to stay open to people's lived experiences – what things mean to them.



What new insightful and unexpected things could you discover by getting to know some participants, users or beneficiaries and learning about their day-to-day experiences?

The things you find out might not be neatly packaged or easily graspable. Instead you might uncover issues of controversy or ambiguity which require further thought and discussion. One example is whether older people are a resource for society, or rather just have "needs" and are a burden to society.

## METHOD 2 : CREATE A STORYWORLD

### Purpose

This method helps bring into view the detail and complexity of a person's life-world. Creating a storyworld or persona helps a team focus on the people who are part of a service in all their diversity. The process of creating and using storyworlds also encourages the kind of creative thinking needed to generate new ideas for your service.

### Outcomes

Using this method we can begin to develop an understanding of a person as connected to lots of other people, organisations and things rather than as an independent actor without a backstory. The method produces a boundary object which can help bring a team together and be referred back to. A successful storyworld will be discussed as if it was a real person and used to test ideas out by asking "would they work for him or her?".

### How to do it

As a research tool. Use the template to structure an interview with someone, to help bring into view different aspects of their life and world.

As a workshop activity. Use the template in small groups, to build up a picture of a persona and his or her world. Take each of the aspects described in the template and then free associate around them, capturing your ideas in writing and drawing on a large blank sheet. Include things which don't seem directly relevant to the service you're designing, but are essential for developing a meaningful, well rounded persona who the whole team can engage with.

Imagine yourself as both a psychologist and an anthropologist, looking for insights into the attitudes and motivations, touchpoints and relationship structures of the person you're creating. You can use experience from your work, day to day life, information from the media or, best of all, some quick research interviews to do this.



## METHOD 3: DESCRIBE DRIVERS OF CHANGE

### Purpose

To understand the key issues shaping the wider world which may have an impact on your service or organisation in the coming years. Identifies why a service redesign or new approach might be necessary and provides some detail on what the key prompts for change might be.

### Outcomes

A shared understanding of the wider issues shaping the future context for your service or organisation. If co-created in a group, the drivers of change matrix helps a team see things from different perspectives and can support critical discussion and creativity. It can also highlight important areas of consensus and disagreement.

### How to do it

Using a very large piece of paper or window, mark out a grid with your time period running across the top – for example five, 10 or 20 years. Along the left hand side, list various aspects of change; political, economic, socio-cultural, technological, legal, environmental, or others specific to your work such as chronic disease or immigration. Distribute post-it notes to participants and ask them to write on them examples of future events, ideas, products or people they associate with any of the categories. Then ask people to share their own ideas with the wider group, gradually filling up the grid by sticking up their post-it notes. If you can, invite an academic or futurist to give an overview first to provoke or inspire you. Reflect as a group on what this picture of the future looks like and what it might mean for people and organisations. What are the points of tension, controversies or unknowns which populate the grid?



## METHOD 4: STORYBOARDING

### Purpose

To gain a sense of what is involved in using a service, or set of related services, from beginning to end. The method provides a way of focusing on the user's experience by developing a human narrative. It also helps participants to understand the gaps and overlaps which might exist between different providers.

### How to do it

Use the template to create your own of how a person interacts with an organisation. Use the template to structure a cartoon-like comic strip, to describe his or her interaction with a service over a specific time frame. Include the people, documents, technologies, places which a service journey might involve. If you can, use photos and print outs to bring your story to life. Ideally, do this several times for different participants, users or staff members so you see things from different perspectives. Remember that the act of drawing your ideas will trigger you creatively so do not wait to have your story worked out before you start writing it down.

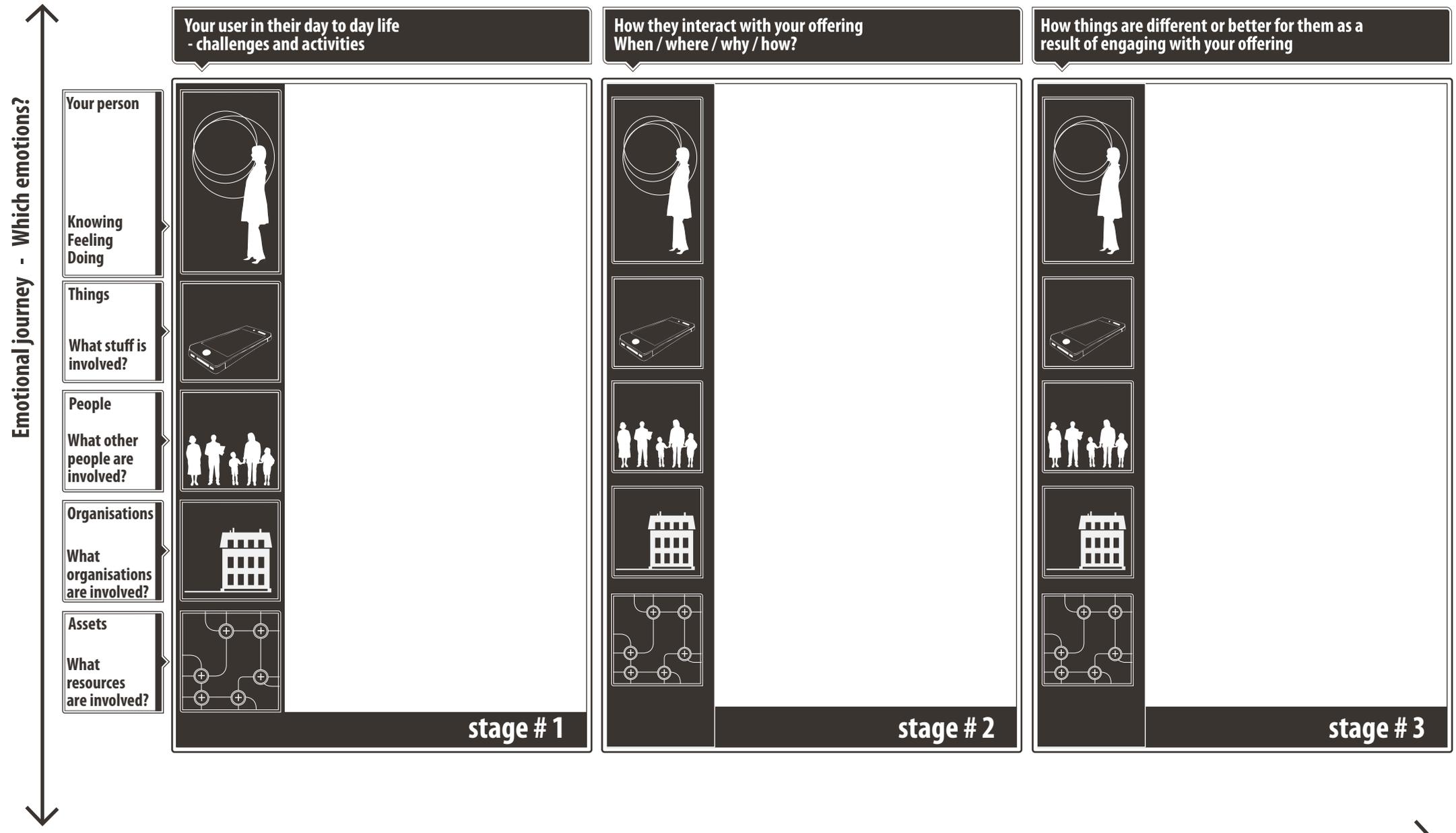


### Outcomes

Helps a team focus on the user's experience of a service, rather than seeing it through the lens of a single specialism or organisational function. Makes a service or interactions with an organisation graspable at human scale, rather than on a system level.

# Storyboard

Use this structure to imagine a story about your user or customer as they engage with your offering



What is the time frame you are telling the story over (an hour / a day / a week / a month / a year / a life?)

## METHOD 5: PROBLEM DEFINITION

### Purpose

To narrow down from a rich picture about complex interconnected issues, towards a key issue which could be improved upon.

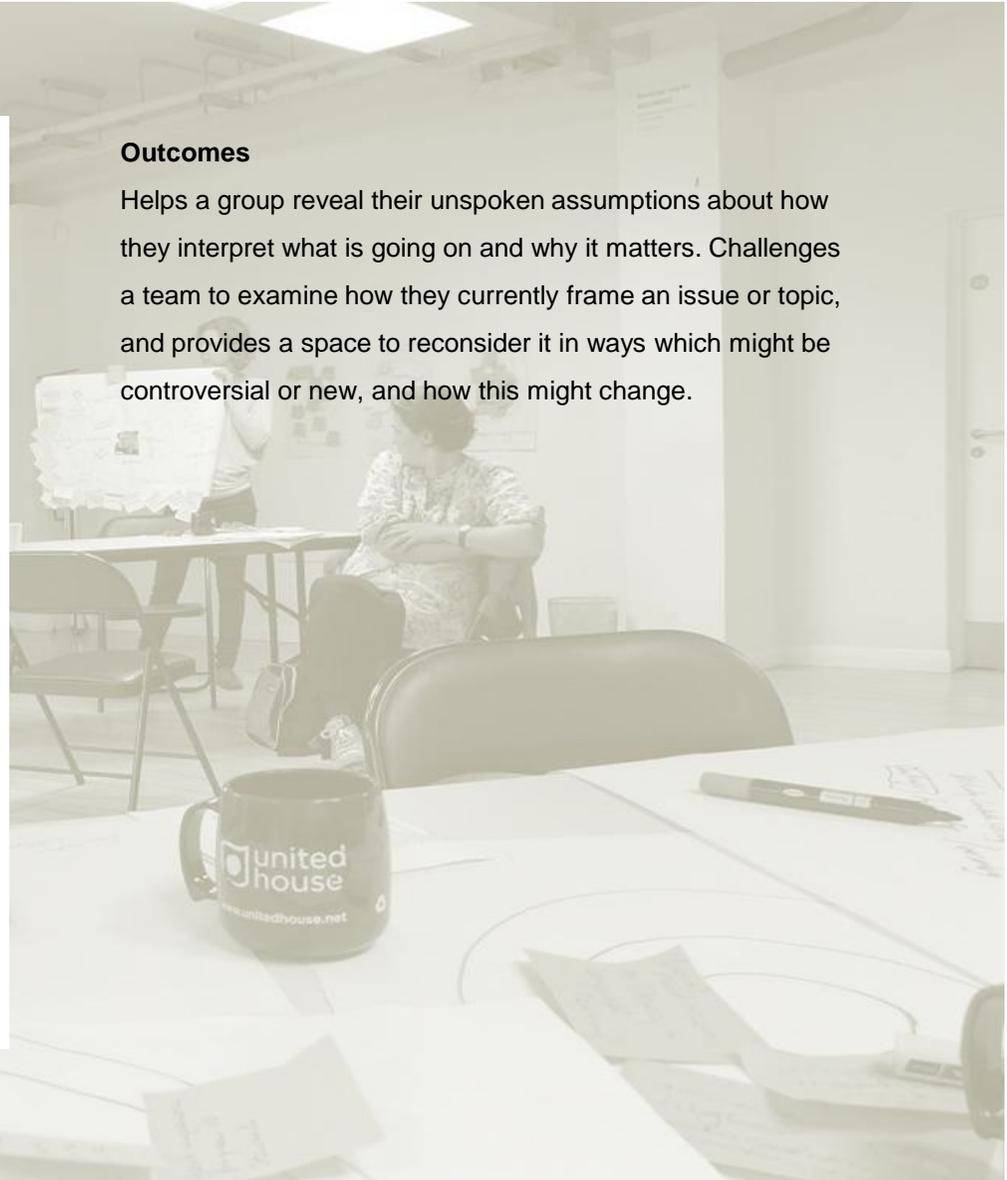
### How to do it

In small teams, go through the problem definition template for a specific person or organisation, writing your notes on a large blank sheet. You can do it several times to reveal different perspectives.

Compare your versions and then discuss whether you are making the same assumptions and framing things in the same way. Then, try to “reframe” the issue – for example, what happens if you see older people as having capacities, not “needs”? Or if a gathering of thousands of young people is seen as a festival, not a public order issue.

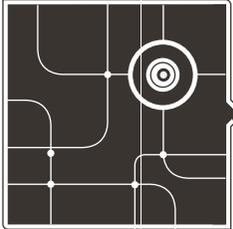
### Outcomes

Helps a group reveal their unspoken assumptions about how they interpret what is going on and why it matters. Challenges a team to examine how they currently frame an issue or topic, and provides a space to reconsider it in ways which might be controversial or new, and how this might change.



# Problem definition

Use this to find and define the issue



What is the issue?

Blank space for notes, with a small icon of a pen in the bottom right corner.



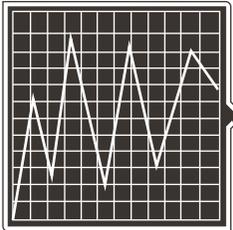
Who is it a problem for?

Blank space for notes, with a small icon of a pen in the bottom right corner.



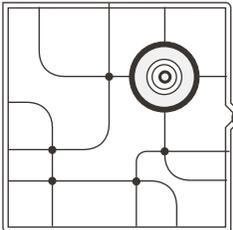
What social/cultural factors shape this problem?

Blank space for notes, with a small icon of a pen in the bottom right corner.



What evidence do you have that this is a significant problem?

Blank space for notes, with a small icon of a pen in the bottom right corner.



Can you think of this problem in a different way?  
Can you reframe it?

Blank space for notes, with a small icon of a pen in the bottom right corner.

## METHOD 6: (RE)DEFINE THE PROPOSITION

### Purpose

For a new venture or service, this helps flesh out the core concept and articulate its benefits and characteristics more precisely. It links the benefits and experiences for individuals (e.g. users or beneficiaries) as well as the organisation or group organising the new offering.

### How to do it

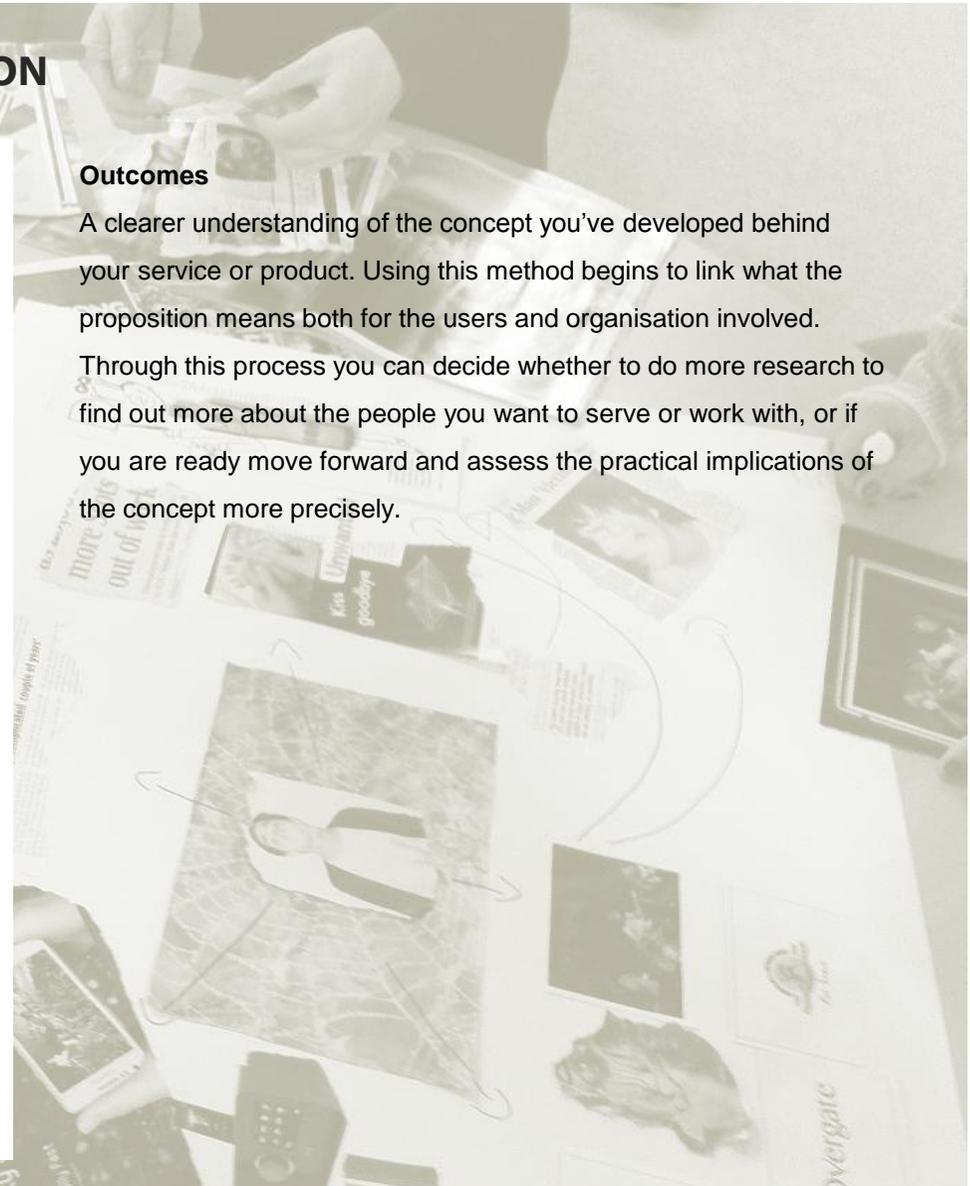
Go through the template paying attention to how the impact of your idea differs for the user and organisation involved. If you think your idea will benefit more than one kind of user fill out the template for each. This will help to test how well the idea translates between different users and their priorities, and whether it is in fact one proposition.

If you've developed the idea as a group you could fill the template out individually and then come together and compare the different templates you have developed. Do you have a shared language for talking about what matters to the people you are trying to serve?

### Outcomes

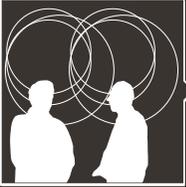
A clearer understanding of the concept you've developed behind your service or product. Using this method begins to link what the proposition means both for the users and organisation involved.

Through this process you can decide whether to do more research to find out more about the people you want to serve or work with, or if you are ready move forward and assess the practical implications of the concept more precisely.

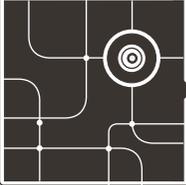


# Proposition

Use this to summarise your vision of the offering for your users or customers



Participant



Current issue or problem

## Unknowns



## Assumptions



## Organisational Challenges



Disruptive innovation

Incremental improvement

## Features and benefits

User 

Organisation 

User 

Organisation 

User 

Organisation 

## Qualities

User 

Organisation 

User 

Organisation 

User 

Organisation 

What it offers

Available alternatives

Improved outcomes/benefits

Useful  
Helps me/us achieve something

Well put together  
Easy to use  
A good use of resources

Lovely  
Pleasing  
Meaningful

Organisation

Organisation

Organisation

Organisation

Organisation

Organisation

## METHOD 7: MAPPING THE SERVICE ECOLOGY

### Purpose

To map the people, organisations and things which exist (or could exist) around a participant and to think about how these different elements connect to one another. To help a team move away from thinking just about people and organisations, and pay more attention to the things that are part of our mutual interactions such as databases, application or assessment forms, leaflets, posters, membership cards, meeting rooms, chairs, buses, cups of tea, websites and apps.

### Outcome

A shared understanding of the complex world of people, things and organisations that make up services. The method provides a way to map existing resources and connections (see How to do it v1), or to suggest new collaborations or configurations (How to do it v2). It also highlights the material and digital touchpoints that are part of day-to-day life, rather than ignoring them.

### Optional preparation: Make a set of cards

If you have the resources, you can customise this method to your specific context by preparing some cards in advance to use in either v1 or v2 of the method. You don't need graphic design skills, just an enquiring mind, access to the web, a colour printer and scissors.

First, create a list of lots of different aspects of the service or organisation you are focussing on. If you have created storyworlds, these should remind you what things, people, organisations and places are part of the lives of the users you are working with. Where possible get colour photos or images that capture or allude to these things, ideally 30-50. Print these out approximately eight to an A4 page. If you can't get an image, use words or phrases instead, so you end up with a card deck of words and images.

Prepare enough sets of cards for small groups to use in the workshop. Make sure they also have blank cards or post-its to add other ingredients too.



**How to do it v1: Describing the as-is**

Draw a set of concentric circles on a large piece of paper and choose a user or participant\* who will be at the centre. Be clear who this is and why they've been chosen (informed by a storyworld about someone's life). Ask people to focus on *how things are right now*.

Now, note down on post-its, all the different touchpoints, people or organisations in this person's life. If you have made a card deck of some of these, make sure everyone has access to it. Ask people to arrange the cards or post-its on the circles in relation to the central person or thing. The more important the thing or person is, the closer it should be to the centre. Aim to map a minimum of 25 things or people.

Get participants to present their maps to the wider group. Discuss what makes strong connections between these different things represented by the cards (e.g. formal or informal partnerships, socio-cultural factors, proximity) and which ingredients might be important but hidden from view (e.g. databases) or taken for granted (e.g. membership cards). Ask what work is being done to keep things connected and consider the extent to which the ingredients you've mapped can be described as independent from one another.

\*You can also put a touchpoint, such as a needs assessment form, at the centre

**How to do it v2: Reconfiguring the to-be**

Draw a set of concentric circles on a large piece of paper and choose a user or participant\* who will be at the centre. Be clear who this is and why they've been chosen (informed by a storyworld about someone's life). Ask people to focus on *how things could be in the future* and say *when* (next year, in five years...).

Now, as a group organise all the different touchpoints, people or organisations in this person's future life. If you have made a card deck of some of these, make sure everyone has access to it. Ask people to arrange the cards or post-its on the circles in relation to the central person or thing. The more important the thing or person is, the closer it should be to the centre. Aim to map a minimum of 25 things or people.

Ask questions that focus on the people and organisations involved e.g. "What if [X] happened?" (inspired by your drivers of change method). Try to reframe the situation (inspired by your problem definition method). Explore how these events might change things – do you need to move the cards around, or add new ones? What would that mean?

Get people to present their ecologies to the wider group. Reflect on the similarities and differences. Are these pictures really just like now? Can you find ways to imagine plausible alternative scenarios?



## METHOD 8: SEGMENTING BY THEMES

### Purpose

To help a team define and agree the target groups they want to focus on or work with. To find a way to divide up (or segment) a large group, so that the service proposition can be designed and developed to more closely match people's needs and resources. Be imaginative about doing this. Try not to use conventional ways of segmenting people such as by age or income. Synthesise from your group discussions, and try to focus on people's habits and the meanings a service or product has for them. Examples might be something like "expanding connections with people" or "using capacities to the full".

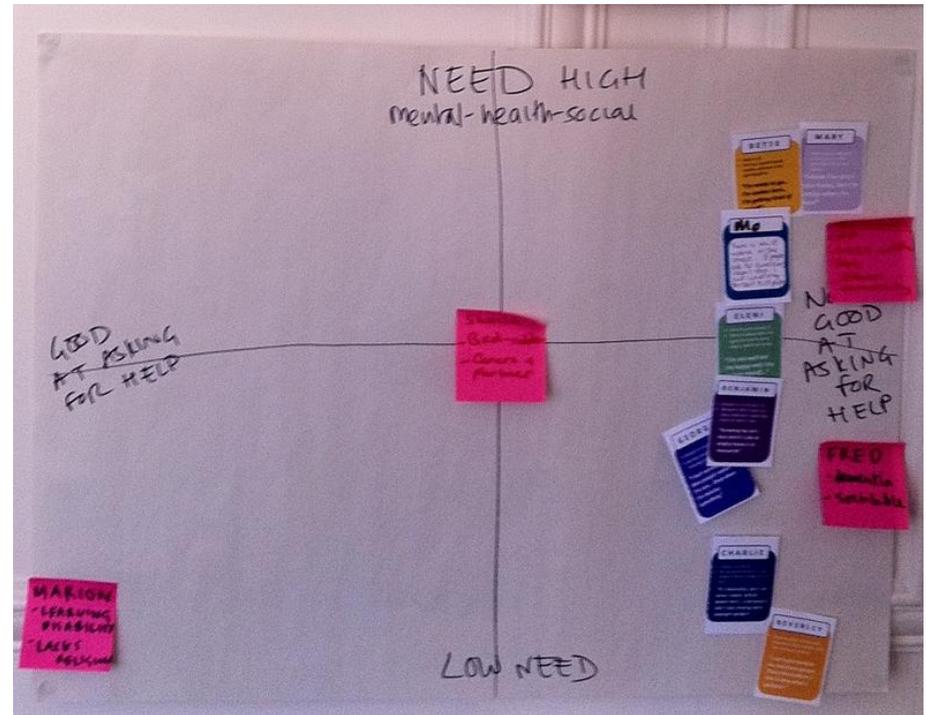
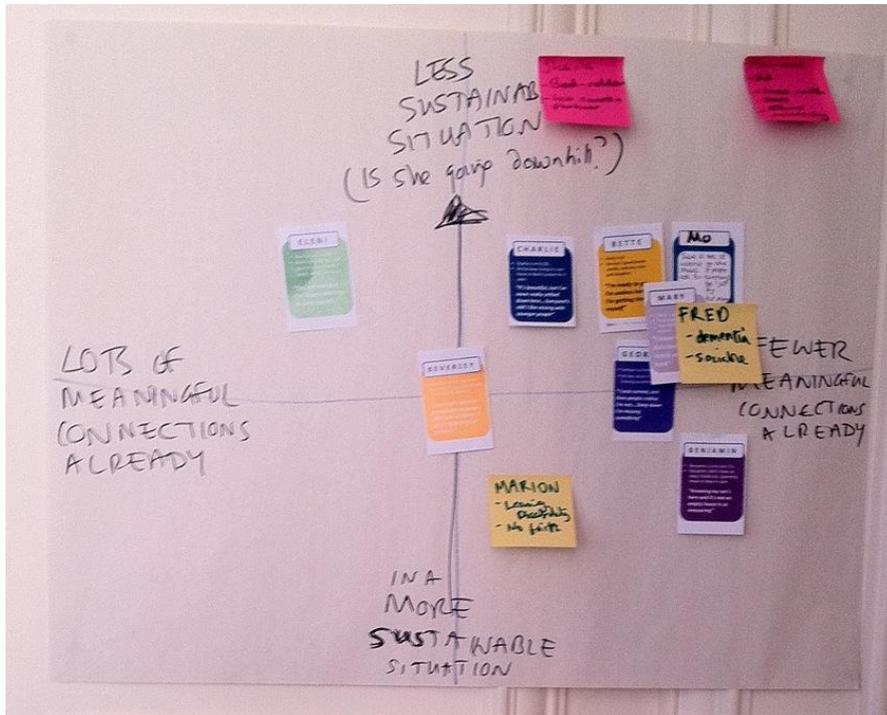
### Outcome

A way of thinking about the specific individuals or groups you want to work with. A structure that acknowledges both their needs and resources, and a way of dividing users co-created by the whole team. The resulting segmentation (i.e. the 2 x 2 grid(s) you produce) will be an important boundary object for the team.

### How to do it

First, bring together your research and analysis such as all the storyworlds and storyboards you have created and any service ecologies. Review them in a mixed group so you all "get to know" your key users or beneficiaries, and then start reflecting on themes that emerge from people's lives. For example if you are looking at older people's care, you might identify themes such as "loss of identity" or "being good at asking for help". Create a list of themes, and then try to agree on four that are most important.

Now, pick two of these to be axes for a 2x2 grid. Take several of the individuals you want to target (from the storyworld method) and write their basic details on some post-it notes. Discuss where they fit within this matrix and when the team thinks they are in the right place, stick the notes up so that you spread out the various notes (representing people) across the grid. Try this again with the other two themes for the axes. Having done this a couple of times, you will have a sense in the group of the best way to divide up your target audience using themes which have a more meaningful connection to their lived experience.



## METHOD 9: SKETCH A TOUCHPOINT

### Purpose

This method explores the touchpoints involved in; publicising, providing or using a service or product. It can be used to analyse something that already exists, or invent a new touchpoint that you think needs to exist. The act of sketching, even before you know everything you need to know, will trigger your creativity.

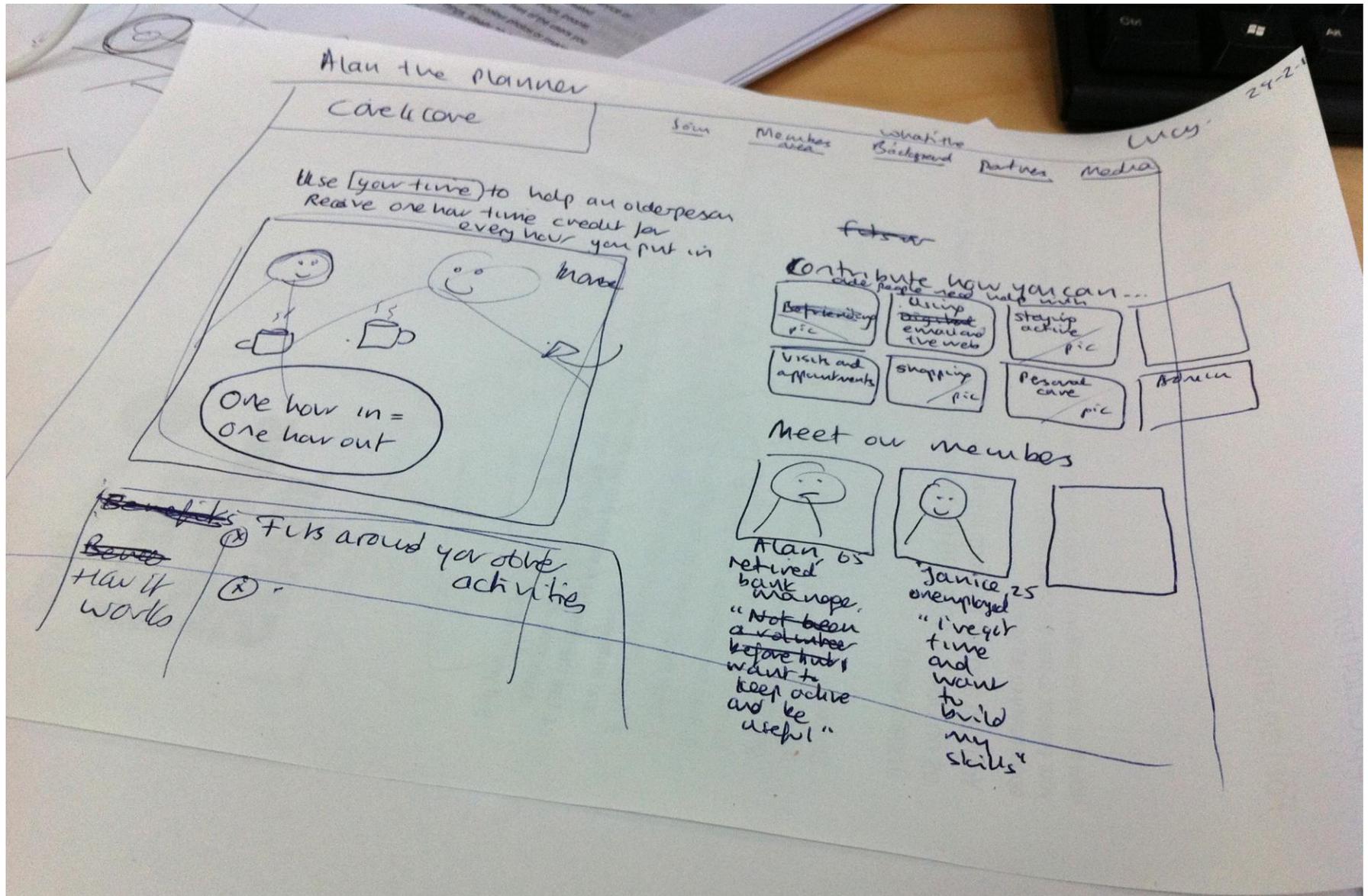
### Outcomes

Sketches of touchpoints that make an emerging proposition tangible and sharable at a human scale. Opportunities to compare ideas that team members have developed. Insights which may not have emerged through just talking or writing about your ideas. A more concrete sense of the venture, service or product, making things more graspable and real for the team.

### How to do it

Sketch a touchpoint associated with the venture, service or product on a sheet of A4 paper. This could be a poster, a web page, an app screen, a sign, a form to fill in, a building, packaging, a letter and so on. Whether the drawings are “good” or not doesn’t matter. By getting the ideas out of your head, they can be shared and built upon by the group.

You could sketch touchpoints individually and then compare and combine the best ideas into one version. If you are focusing on an existing touchpoint, the act of sketching it will help you analyse it more carefully and draw out its good and bad points along with opportunities for improvement.



## METHOD 10: PLOT AN OUTCOMES MATRIX

### Purpose

To help a group define and agree on the target groups they want to focus on or work with, and the outcomes the venture, service or product might have on their lives.

To make explicit links between the different people you want to work with or engage, and the impact your venture, service or product might have on their lives.

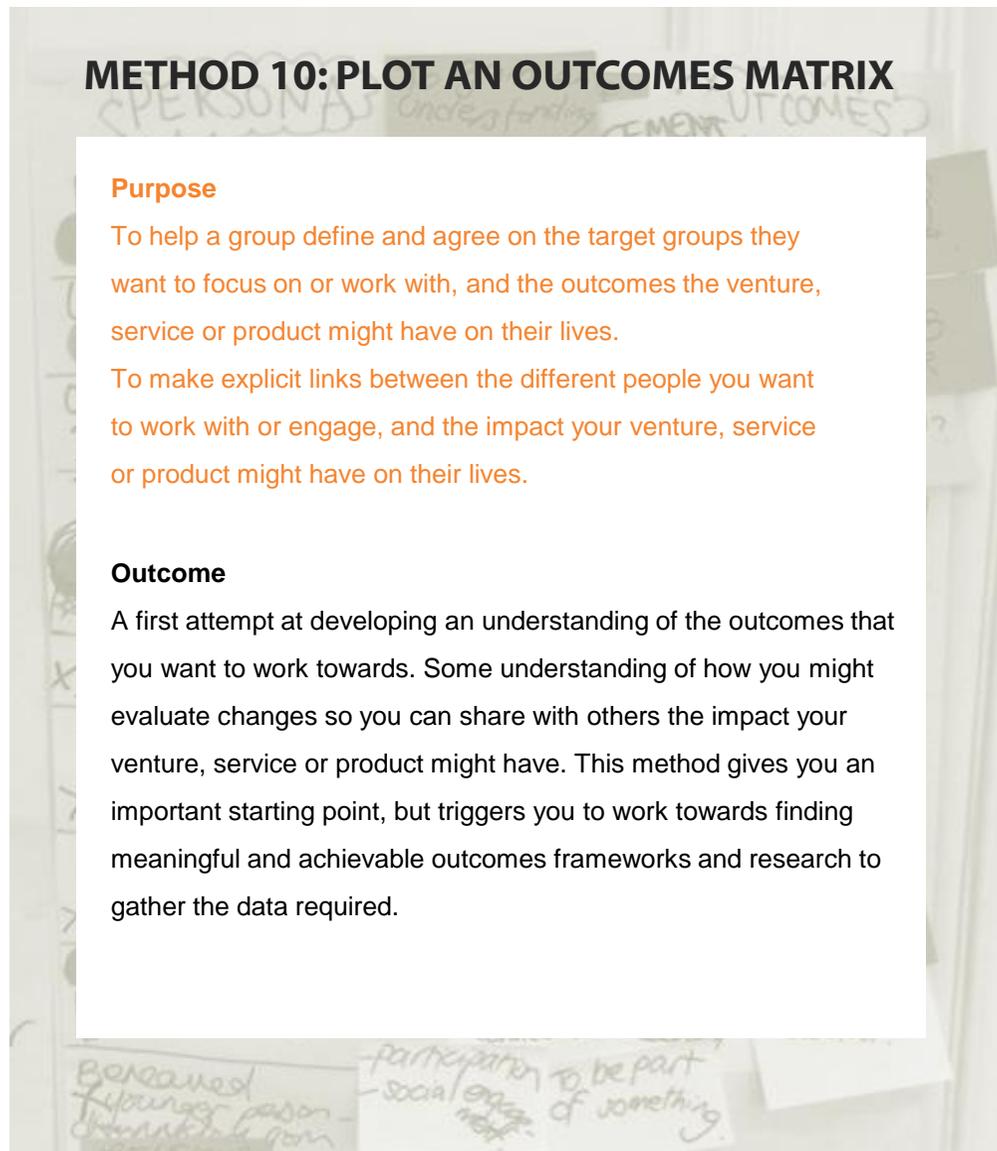
### Outcome

A first attempt at developing an understanding of the outcomes that you want to work towards. Some understanding of how you might evaluate changes so you can share with others the impact your venture, service or product might have. This method gives you an important starting point, but triggers you to work towards finding meaningful and achievable outcomes frameworks and research to gather the data required.

### How to use it

Reproduce the template by drawing it on a large sheet of paper on the wall. In a group, ask people to start suggesting outcomes you want for specific groups. Your segmenting by practice framework will help you identify the groups you want to work with. Your propositions will help you reflect on what different outcomes they might want (or others might want for them).

Having described the outcomes you hope to work towards, then aim to describe the measures that might give evidence that these outcomes have been achieved. Then consider how you might try to gather that evidence – is this data you or others have access to already, or will you have to organise resources to capture and make sense of that data? Finally, identify the different audiences or stakeholders who will be interested in these outcomes.



# Outcomes matrix

Use this template to define outcomes to work towards for specific target groups

**Specific segment or group**

**Insight about what matters to this group**

**Outcome 1:** the noticeable change as a result of your service, product or venture

**Measure 1:** how you show this change via gathering data

**Outcome 2:** the noticeable change as a result of your service, product or venture

**Measure 2:** how you show this change via gathering data

1 					
2 					
3 					
4 					

## METHOD 11: BLUEPRINTING

### Purpose

To give a sense of how the new ideas you are proposing will impact on service users, staff and others, both at the point of external use and inside the organisation(s) involved. Or to analyse in detail an existing service. It links what a specific user experiences, their own resources and those which they encounter in organisations involved. The method helps to make explicit what new resources will be needed or how old ones will be reconfigured in order to achieve the idea.

### Outcomes

Brings a service journey into view, and articulates it to other group members or stakeholders, at human scale. By drawing up a blueprint gaps or issues in an idea can be identified and worked on.

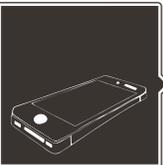
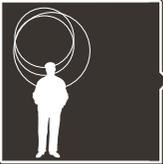
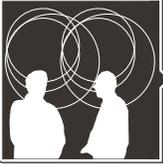
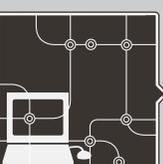
### How to use it

Working in small teams with a range of knowledge and backgrounds, use the template to think through the different ingredients involved in creating, producing and using the service or product.

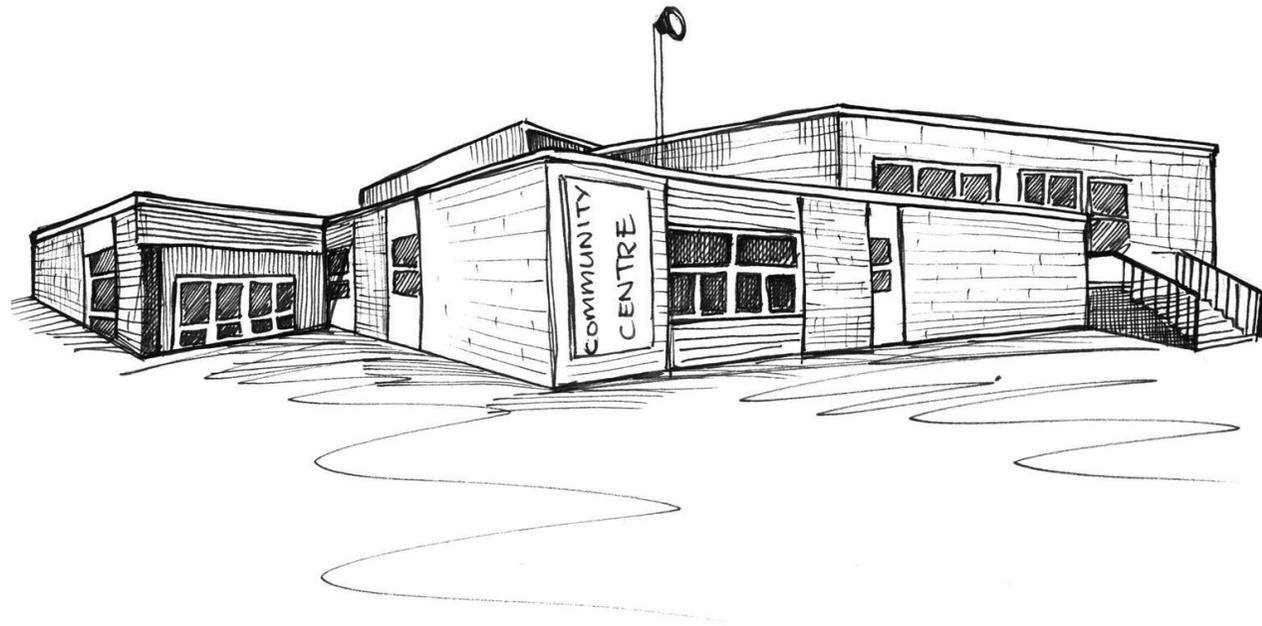
You can use the template to analyse the current situation or existing service, or do it for the new proposition. In either case, the template pushes you to highlight the key resources and processes that are required “backstage” in the organisation(s) involved, and links these with what other people such as participants have to do and know. When doing this make sure you produce a blueprint for several different participants who you are modelling the venture, service or product around and try to anticipate what their activities and response to your intervention might be.

# Blueprint

Use this to describe or imagine a participant's engagement with the service

		Aware	Join	Initial use	Use again	Finish using
	Things, media and devices					
	What the user does, feels, knows, thinks					
	What other people do, feel, know, think					
	What service personnel do, feel, know, think					
	Where things happen					
	What service personnel do, feel, know, think					
	What supports the service					

# RECIPES & RESOURCES



# RECIPES

These recipes suggest different ways to combine the ingredients of the social world via the various methods we described earlier, to serve particular purposes. They are by no means fully comprehensive.

They offer different ways to help you address an issue you, your team or organisation face and a way to use the methods to engage colleagues productively in working through it to find new ways to configure resources in the form of new services or ventures. We advocate doing or commissioning ethnographic or other qualitative research first to deepen your understanding of the issues or controversies you are working with. But this isn't always possible.

These recipes can't replace the experience and knowledge of professionals skilled in using these methods, that some designers and entrepreneurs have from years of being involved in creating new products or services. But – like a recipe in a cookbook – they give you a sense of how you could combine the basic ingredients of any project – people, digital and material things, and organisations – to work together to tackle important issues.

# RECIPE 1 Service critique

Modes: **exploring, making sense**

<p><b>Activity</b> Create storyworlds and storyboards based on interviews and site visits</p>	<p><b>Outcome</b> You are attuned to understanding and valuing participant and user experiences and resources and have learned where things go wrong and where they go right</p>	
<p><b>Activity</b> Find out something unexpected – analysis of touchpoints in the service or related to the issue that people come into contact with or use or create</p>	<p><b>Outcome</b> You are attentive to how touchpoints are critical to the existing service and opportunities for change</p>	+
<p><b>Activity</b> Create blueprints that reveal issues and opportunities , especially focussing on when things go wrong</p>	<p><b>Outcome</b> You understand where participant and organisational and resources are not well aligned or connected</p>	+
<p><b>Activity</b> Segmenting by themes and creating an outcomes matrix</p>	<p><b>Outcome</b> You have created a way to divide up the groups of people you want to target and work with, and you are focussed on the outcomes you and they want to achieve</p>	+
<p><b>Activity</b> Problem definition</p>	<p><b>Outcome</b> You review and possibly reframe how you think about the service and what matters and why</p>	+
<p><b>Activity</b> Having reviewed these materials, you define and agree which issues and opportunities are most pressing and stage a conversation about what to change</p>	<p><b>Outcome</b> You have a deeper understanding of issues and opportunities and are ready to take action to start making changes</p>	=

# RECIPE 2 Quick wins

Modes: **exploring, making sense, proposing**

<p><b>Activity</b> Create storyworlds and storyboards based on interviews and site visits</p>	<p><b>Outcome</b> You are attuned to understanding and valuing participant and user experiences and resources and have learned where things go wrong and where they go right</p>	
<p><b>Activity</b> Problem definition</p>	<p><b>Outcome</b> You review and possibly reframe how you think about the service and what matters and why</p>	+
<p><b>Activity</b> (Re)defining the proposition for existing or possibly other target users or participants</p>	<p><b>Outcome</b> You identify and clarify what a service is offering for specific target groups, and compare the actual situation with what you think happens</p>	+
<p><b>Activity</b> Mapping the service ecology</p>	<p><b>Outcome</b> You discover resources that were previously not so obvious to you, and see opportunities to reconfigure resources in the service ecology</p>	+
<p><b>Activity</b> Create blueprints for a future version of the service, that identify opportunities for change that are realistic to deliver to time, quality and budget</p>	<p><b>Outcome</b> You understand how participant and organisational and resources are not well aligned or connected and the team who will make the changes understand how their work connects to each other's</p>	+
<p><b>Activity</b> Having reviewed these materials, you define and agree what next steps to take with the resources available to implement your new designs</p>	<p><b>Outcome</b> You are ready to start implementing the changes and the team who will do this work are better able to work together and understand how their activities shape to the experiences of participants</p>	=

# RECIPE 3 Improvement

Modes: **exploring, making sense, proposing, iterating**

<p><b>Activity</b> Find out something unexpected, create storyworlds and storyboards, and segment by themes</p>	<p><b>Outcome</b> You are attuned to understanding and valuing participant and user experiences and resources and have learned where things go wrong and where they go right</p>	+
<p><b>Activity</b> Problem definition</p>	<p><b>Outcome</b> You review and possibly reframe the service prompting you to consider what matters and why this is so</p>	+
<p><b>Activity</b> (Re)defining the proposition and creating an outcomes matrix</p>	<p><b>Outcome</b> You identify and clarify what a service offers and compare the actual situation with what you think happens</p>	+
<p><b>Activity</b> Mapping the service ecology</p>	<p><b>Outcome</b> You identify resources that might not have been obvious or viable before, and see opportunities to reconfigure resources in the service ecology to create value in new ways</p>	+
<p><b>Activity</b> Create blueprints for a future version of the service, that identify opportunities for change that are realistic to deliver to time, quality and budget</p>	<p><b>Outcome</b> You understand where participant and organisational and resources are not well aligned or connected</p>	+
=		
<p><b>Activity</b> Having reviewed these materials, you define and agree what next steps to take to implement your designs</p>	<p><b>Outcome</b> You are ready to move towards gathering and costing resources and doing quick experiments to test your ideas</p>	

# RECIPE 4 Innovation

Modes: **exploring, making sense, proposing, iterating**

<p><b>Activity</b> Find out something unexpected, create storyworlds and storyboards, and segment by themes</p>	<p><b>Outcome</b> You are attuned to understanding and valuing participant and user experiences and resources and have learned where things go wrong and where they go right</p>	+
<p><b>Activity</b> Drivers of change and problem definition</p>	<p><b>Outcome</b> You review and possibly reframe the service in the context of wider developments</p>	+
<p><b>Activity</b> (Re)defining the proposition and create an outcomes matrix for specific participants</p>	<p><b>Outcome</b> You identify and clarify what a service will offer participants and how it could lead to outcomes you want to work towards, which you may not be yet able to define or assess</p>	+
<p><b>Activity</b> Iterative cycles of storyboarding, sketching touchpoints and mapping the service ecology</p>	<p><b>Outcome</b> You see opportunities to reconfigure resources in the service ecology and/or create new touchpoints</p>	+
<p><b>Activity</b> Create blueprints for a future version of the service, that identify opportunities for change, some of which may be challenging to deliver</p>	<p><b>Outcome</b> You are able to have a collective conversation about how some of these proposals will change how participant and organisational and resources are combined and aligned</p>	+
=		
<p><b>Activity</b> Having reviewed these materials, you define and agree what next steps to take, but at the same time find ways to involve other participants in developing ideas further</p>	<p><b>Outcome</b> You are ready to move towards gathering resources, engaging stakeholders, and learning from cycles of quickly prototyping your ideas</p>	

## GLOSSARY

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**Beta.** This term comes from software development. It indicates a working version which, although complete, represents a first attempt which will be modified further.

**Boundary object.** A document or diagram which helps people from different teams or departments do their collaborative work. Something that has meaning for all of them, but helps them focus on their own specialisms.

**Design.** Devising a course of action aimed at changing an existing situation, into a preferred one (Herbert Simon 1969); working towards change that is meaningful, effective and valuable for participants through a practical, exploratory process that becomes increasingly focussed.

**Method.** An activity or way of doing something, which enables insight and provides structure to get work done. An activity that moves things on.

**Network.** A collection of human beings and digital and material things that hang together for something to exist or happen (e.g. office chair-person-keyboard-PowerPoint). You might not notice the boundaries of a network until you start mapping it.

**Participant.** We use this interchangeably with customers, users, activists, volunteers, beneficiaries. When we use these word we are referring to the wide range of people who will be involved in a project using social design methods.

**Service.** A configuration of people and digital and material things that together supports the co-creation of value.

**Touchpoint.** A digital or material object which users or customers interact with as they engage with an organisation, venture or service.

## READING AND WATCHING LIST

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### Books and publications

Bate, P. and Robert, G. (2007) Bringing user experience to healthcare improvement: The concepts, methods and practices of experience based design.

Brown, T. (2009). Change by design: How design thinking transforms organisations and inspires innovation.

D-school. Bootcamp Bootleg. <http://dschool.stanford.edu/wp-content/uploads/2011/03/BootcampBootleg2010v2SLIM.pdf>

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Liedtka, J. and Ogilvie, T. (2011) Designing for Growth.

Martin, R. (2009) The Design of Business: Why design thinking is the next competitive advantage.

NESTA. Prototyping Framework. [http://www.nesta.org.uk/events/assets/features/prototyping\\_framework](http://www.nesta.org.uk/events/assets/features/prototyping_framework)

Social Design Talks. <http://socialdesigntalks.org/>

The Young Foundation Social Business Model Canvas. <http://growingocialventures.org/course-content/social-business-model-canvas>

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Beckman, S. and Barry, M. (2007) Innovation as a learning process. Embedding design thinking. California Management Review, 50(1), 25-56.

Julier, J. (2011) Political Economies of Design Activism and the Public Sector. Nordes Conference.

Stigliani, I. and Fayard, A.L. (2010) Designing new customer experiences: a study of socio-material practices in service design. Discussion paper. Imperial College.

Thorpe, A. and Gamman, L. (2011) Design with society: Why socially responsive design is good enough. Co-Design, 7(3-4), 217-230.

### Videos

Tim Brown of IDEO at TED, 2009 [http://www.ted.com/talks/tim\\_brown\\_urges\\_designers\\_to\\_think\\_big.html](http://www.ted.com/talks/tim_brown_urges_designers_to_think_big.html)

Design the New Business, 2011 <http://vimeo.com/31678404>

Lucy Kimbell at Central St Martins, 2012 <http://vimeo.com/42554359>

Ezio Manzini at Parsons, 2012s <http://vimeo.com/39991754>

Emily Pilloton at TED [http://www.ted.com/talks/emily\\_pilloton\\_teaching\\_design\\_for\\_change.html](http://www.ted.com/talks/emily_pilloton_teaching_design_for_change.html)

Chris Vanstone at Central St Martins, 2012 <http://vimeo.com/41927888>

## A NOTE ON POST-IT NOTES

Two decades ago, the emblematic artefact associated with designers was probably a pencil. In the last decade it's become the post-it note, which echoes the shift some designers have made between giving shape and form to products towards applying their approaches and methods to addressing complex organisational and social issues.

But there's more to design-based approaches than using post-it notes. What these can help do – although it of course depends how they are used – is quickly capture the ideas of groups of people, and allow them to be shared and reviewed collectively. This is one way of bringing into view the complex concepts and concerns of different people involved in a project, supporting group creativity and discussion.

We recommend having a pack containing the following materials to hand when using this Methods Menu:

- Post-it notes in different sizes and with different colours
- Blank paper of different sizes, including some large A1 or flipchart pads
- Coloured pens (like Sharpies and larger marker pens)
- Blue tack to stick paper on the walls
- Scissors
- Print outs of the templates in this publication (ideally colour, A4, but we've designed them to work black and white too)
- Sticky tape



In addition to these materials it is also important to try and think of the space available to you as a *studio* where you can record and develop your ideas, and be a bit messy, as opposed to it being the usual place for a meeting. This might involve moving furniture around or sticking lots of images up on the walls. Creating the means to have such as space might be part of your work too.

# MAP OF INFLUENCES

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## ABOUT US

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### Lucy Kimbell

I work as a designer, researcher and educator. I'm a fellow at The Young Foundation and associate fellow at Saïd Business School, University of Oxford, where I have been teaching design thinking and service design to MBAs since 2005. As head of social design at The Young Foundation in 2012 I developed the organisation's capacity to bring designerly approaches to its applied innovation projects and ventures.

Twitter [@lixindex](#)  
[hello@lucykimbell.com](mailto:hello@lucykimbell.com)

### Joe Julier

I am a recent graduate from Goldsmiths College where I studied for a BA in Sociology. Prior to this I completed foundation studies, specialising in design, at Leeds College of Art. I interned at The Young Foundation and currently work in the Manufacturing, Design and Innovation Group at Policy Connect. I have two years frontline experience working as a carer in Lambeth.

Twitter [@joejulier](#)  
[joejulier@gmail.com](mailto:joejulier@gmail.com)

# CREDITS

Written by Lucy Kimbell and Joe Julier.

Visual design and artwork by Kirsten Downie.

Templates designed by Lucy Kimbell, with input from Jacques Mizan, Kirsten Downie and many people who have tried them out over several years of development in particular MBAs taking Lucy's classes and colleagues at The Young Foundation. They are inspired by and reference work by many other designers and ethnographers.

We welcome feedback. Please email [hello@lucykimbell.com](mailto:hello@lucykimbell.com) or tweet to [@lixindex](https://twitter.com/lixindex) with your comments

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