Strategic design

Eight essential practices every strategic designer must master

Giulia Calabretta,
Gerda Gemser &
Ingo Karpen
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GIULIA CALABRETTA
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GERDA GEMSER
RMIT University

INGO KARPEN
RMIT University

Introduction
The increasing importance of strategic design

The scope and influence of design is expanding rapidly these days. Organizations are increasingly adopting a design approach to define and implement their innovation strategies, using design to leverage organizational transformations, and even embracing design principles as the overarching philosophy that guides their entire organization. There are more and more Chief Design Officers (CDOs) leading innovation activities and fueling internal design culture – Apple’s Jonathan Ive and PepsiCo’s Mauro Porcini immediately spring to mind. Organizations like SAP and Microsoft are using design methods and practices to transform their product/feature-focused cultures into user-centered ones. And global business consultancies like McKinsey and Accenture have recently begun to acquire entire design agencies to better serve design-driven client needs. Even entrepreneurship is bonding with design, as start-up unicorns like Airbnb are not only being founded by designers, but make design principles the core of their offering and growth strategy.
PART I

Setting the objectives of a strategic design project
Describe the KLM crew centre.

‘It spans three floors of an office building at KLM’s hub, Schiphol Airport. The airline employs roughly twelve thousand flying personnel, including flight attendants and pilots. These people do not work regular hours. A lot of them work part-time, and work a flight once every one or two weeks. Staff rarely work with the same colleagues. New crews are formed for every flight, so it’s not often that you see your colleagues more than once in your career. The crew centre is the closest thing to an office that they have. And the familiar faces of the people that work there are one of the few stable factors in their working life.’

Why do they form new crews for every flight?

‘KLM sees this as the most efficient way to run a very complex organization. Manning tens of thousands of flights each year is a logistical feat of gargantuan proportions. Keeping crews together would only make things more complex. But flying with a regular crew also has its benefits. Once “tuned into” each other, the crew could reach an optimal performance level. However, familiarity can tend to blur the boundaries between professional roles, and some behavioral patterns are formed which can serve as a disadvantage to overall team performance.’

‘Crew performance is influenced by a complex interplay of factors. For example, passenger satisfaction survey results show that passengers are slightly less satisfied with the crew on return flights.'
Can this dissatisfaction be attributed to the “role blurring” as described above, or to the different mix of passengers on homebound flights, or can it be explained by the fact that nighttime departures occur more often at airports other than the hub? We know that crew performance has a significant effect on passenger satisfaction, so that is all the more reason to study the interplay of these elements in-depth.\(^1\)

**What happens at the crew centre, exactly?**

‘A lot of practical things take place. Crew members need to check in, and then they usually drop off their hold luggage. Because crew members get a daily allowance for each layover day, there are also ATM machines they visit to withdraw cash in various currencies.\(^1\)

‘Staff members are on hand to solve urgent problems on the spot – from expired passports to troubles at home. Crew members can check the roster, and request changes. Each of the twelve thousand employees has their own personal post box, used to spread internal memos and other corporate communications. Some employees are actually quite attached to their own little pigeon hole.’

‘There are two main user groups, each of which observes a slightly different set of pre-flight routines. The cabin crew, consisting of flight attendants and pursers, goes to one of the briefing rooms for a flight briefing. This is the first time that the people who are going to fly together will have met. Over the course of twenty minutes, the cabin crew learns about passengers with special needs and new safety procedures – anything out of the ordinary really. After the pre-flight briefing, the crew jointly exit the crew station and head for the gate.\(^1\)

‘The cockpit crew, consisting of pilots and co-pilots, has their own space to prepare for the flight. Together, they calculate how much fuel to load, check the latest weather reports, and plot the safest route. They have usually finished their preparation once the cabin crew arrives.’

‘These are largely procedural issues. But there is also a lot of socializing and waiting going on. Check-in time is ninety minutes before the flight, but lateness cannot be tolerated, so the crew usually leave quite a margin to be safe. They arrive early, and have extra time to spend. They have coffee, make small talk or talk to their loved ones on the phone before heading out.’

*Do you remember what KLM asked you? What was the briefing you got from them?*

‘When we got involved, KLM had already started a project aimed at improving the crew centre. They were determined to involve the users – the crew – from the very start. This meant organizing several co-creation sessions. The marketing and branding department also had several ideas for improvements, as did the company responsible for facilities management. So at one point there were literally a hundred ideas that had come from multiple directions. Around that time, the project became known as the “Moodstreet project”. We got involved some time after that.’

*“Moodstreet”? That sounds interesting.*

‘Let me briefly explain what it means. Imagine you are a flight attendant getting ready for work, a process that takes several steps. You may start your day in
jogging pants, looking all scruffy. But at some point you freshen up, do your hair, shave or put on some make-up. After that, you pack, get dressed and head out the door. At Schiphol you begin to feel the buzz of the airport. There is more and more KLM blue around you. You meet your colleagues and start to get a feel for what’s going on in the air, what’s in store for this particular flight. Remember that KLM is a full-service carrier – you are expected to be your best self when interacting with passengers. This means getting into the right mood. Comparable to going through a car wash, called a “wash-street” in Dutch – so, “mood-street”, there you have it.’

In the end, what was the brief that Reframing Studio got?

‘Well the team was struggling with decision-making. They were in need of arguments that would impact their choosing one decision over another.’

‘For big projects with massive numbers of stakeholders, sound arguments keep everyone on board. They wanted to be able to demonstrate the value of the “mood-street” to everyone involved.

Including higher management. This is exactly why we typically use Reframing – to ensure that we have a clear and future-proof notion of the reasons that prompted the design. And we then use it to make sure that the reason – the “why” – is aligned with the “how” and the “what”.

‘KLM needed a new frame of reference for their ideas – a vision that could help them determine an idea’s relevance, and discern the “good” ideas from the “bad” ones. They were also open to the possibility that their idea generation may not have been exhaustive, despite the huge number of ideas they already had. So the project team asked us to help them develop a framework they could use to move forward.’
KLM crew members are very good at quickly forming tightly nit teams. They have no prior experience with one another and must perform their task almost immediately upon formation. In research literature these teams are called Swift Starting Action Teams (STAS) and "swift trust" plays a crucial role in the proper functioning of these teams. Swift trust is forward trusting; a high level of trust is assumed initially, despite the premature nature of the relationship. Only later the level of trust is verified and adjusted if needed.

Swift trust occurs when team members are aligned "a priori." Explicitly through clearly defined roles and responsibilities of individual/team members, and implicitly through a rich company culture, strong group norms and habits and similar backgrounds in education. The shared language forms a solid basis for cooperation. Swift trust needs to occur in just the right amount. Too much of it can cause complacency and a lack of mutual monitoring. Too little can lead to conflict.

Figure 1.4: Example of a cluster of ten factors which describes a phenomenon that influences human behavior in the domain of "crew performance in 2019"

How did KLM’s needs translate to the VIP/Reframing methodology?

"KLM asked us to develop a future vision of the domain of "crew performance" with a five year scope. They wanted us to tell them what the crew centre would mean to the crew. So we needed to look at the domain from the perspective of a crew member – a typical brief. We start out with a domain and a scope and get to work."

Do you formulate a domain and scope together with the client?

"Yes, we do – especially the scope. We suggested looking far into the future, because a few of the current issues had bogged them down."

"Consider, for example, those 12,000 post boxes, and the spatial and practical logistics involved in maintaining them. Although crew members had an almost fanatical attachment to them, the existence of present-day technological
Visualizations, prototypes and their related practices are highly effective ways to develop strategic projects and call organizations to action. That effectiveness can be maximised if the designer keeps the following four features in mind:

1. **Keep it simple.** Strategic visualizations are intended to make an uncertain future more approachable. Thus, any new technologies, early prototypes and potential new market scenarios should be presented using simple representations that depict essential information. Designers should not aim to showcase their drawing skills, but rather to spark the imaginations of relevant stakeholders.

2. **Leave it incomplete.** If the aim is to solicit feedback and inspire action, undeveloped or incomplete visuals might – surprisingly – be what is required (see Figure 2.1). For instance, presenting a customer...
journey map that has only been sketched out, which stakeholders are invited to complete with their own first-hand observations of user behaviours will better serve a strategic purpose than a full-scale customer journey where designers have filled in all the blanks – including new business directions. Also, detailed visualizations trigger detailed questions that are not yet relevant in the early stages of a project. On the other hand, conceptual visualizations trigger general observations about the overall idea. Moreover, if the visualization is too detailed, some stakeholders may assume that the general idea has already been fixed, and fail to see how their contributions matter.

3. **Plan the making process.** The process of creating a visual or material artefact together with a stakeholder

*Figure 2.3: An intermediate step in the making of INK visuals*
company and eventually to other players in the ecosystem. Design methods, the fostering of a designerly mindset and employing designerly modes of work have emerged as particularly suitable ways to ignite and consolidate change, given their ability to reduce perceived risks and make unconventional and unexpected futures approachable and even engaging. Design has created a framework, dubbed ‘Co-creating Innovation’, and developed a method within it, which we call the ‘Rapid Co-Creation approach’, to help us move forward. The Co-creating Innovation framework focuses on creating meaningful propositions for business opportunities in the ecosystem and, through an iterative process, enabling the company to improve and implement those propositions. The Rapid Co-Creation (RCC) approach aims at accelerating acceptance and implementation by translating the proposition into a prototype and iterating on it. (Calabretta and Perez, 2014). The Co-creating Innovation framework is visualized in Figure 2.3.

The framework starts with a position stage, where different stakeholders identify relevant business opportunities and derive meaningful propositions to iterate on. Research findings from different sources and different methods, together with knowledge of current products and services and understanding of company resources, assets and capabilities drive the positioning stage and the creation of the proposition. Propositions are then regarded as hypotheses to be tested through RCC (the create stage), as only through experimentation and fast iterations can Philips really understand whether a proposition is truly relevant to people, technically feasible and viable for our business. In order to be carried out effectively, RCC needs to be supported by an infrastructure that enables the realization of the prototype, and any technical iterations it has (the enable stage). Such infrastructure includes, for instance, IT systems, hardware and software components and even privacy...
policies. Given the iterative and non-linear nature of co-creation, the three stages run simultaneously. In parallel to them, the empower aspect creates support within the company for design-driven co-creation, and design thinking in general, by conducting training courses on RCC that are open to everyone – especially to people who do not belong to the Design community. This activity is fundamental to increasing the odds of a ‘soft landing’ for the innovative propositions and prototypes that may come out of the RCC approach.

Within the Co-creation Innovation framework, RCC is one of our core methods (see Figure 2.4) RCC best exemplifies the inspiring power of combining prototypes – strategic visualizations – with a co-creative approach. Different internal and external stakeholders are involved throughout the process, generating enthusiasm and commitment for the innovation outcome and its implementation. The RCC approach is not novel – it is based on design thinking as developed by a number of eminent design companies and professionals, but for a large company with a manufacturing tradition it can be regarded as radical. Thus, Philips – and Design – is exemplar in the way it has renovated and upgraded these approaches in order to make them work within the Philips context.

Design started RCC in 2009, initially with the aim of establishing a structured
direction. However, it is difficult to combine the neutrality that effective facilitation requires with designers' own expertise in desirability. As it is important that the 'people perspective' is well represented, the designer-facilitator might show a degree of bias – or be seen as biased – their commitment to represent the users may unconsciously steer the team towards solutions that might overemphasize desirability at the expense of feasibility and viability. For co-creation and RCC to be successful, different designers with different roles should be present – some should lead and facilitate co-creation, some others should focus on desirability of the solutions, and perhaps some others could take care of the visualizing processes, activities and outcomes.

3. *Research should be conducted throughout the process as a parallel activity.* One of the risks of RCC is that the emphasis on speed might make the innovation efforts too shallow. To prevent that, research should accompany the entire process, and cover different aspects. Early stages (*preparation and frame*) should be focused on understanding the company and how the outcome of RCC will fit within the existing product portfolio, brand, capabilities and assets. Furthermore, user research on the lifestyle domains for which RCC will develop solutions is also important. For instance, if the aim of RCC is to develop a proposition for monitoring and improving individual lifestyle habits, then gaining in-depth scientific and user knowledge on topics like sleep and lifestyle change improves the team’s prototyping and reflecting capabilities. The level of research depth and specificity increases all along the process, and may even lead to involving specific knowledge experts in the co-creation team.

4. *Designers should be able to assess the required prototyping fidelity levels.* The ideal level of ‘visualisation’ to present to users and stakeholders is the subject of ongoing debate. There needs to be a balance between what is needed to get the right feedback at a particular stage in the process, and a level of clarity and completeness that both inspires stakeholders and makes them confident in taking decisions.

As we, as a society, move towards more systemic and volatile problems and solutions, the ability to visualize preferable future directions and to develop them quickly, iteratively and with a firm end-user focus to ensure that people will recognize and adopt the solutions is of utmost importance. Design and design thinking have a key role to play in developing these solutions, but in order to deliver on this promise we need to embed them well in every organization. The proper use of visualization techniques and co-creation methods plays a key role in developing sustainable solutions that have the confidence of many stakeholders and meet the challenges of today and tomorrow.
About the authors

GIULIA CALABRETTA is Assistant Professor in Strategic Value of Design at the Faculty of Industrial Design Engineering, Delft University of Technology. Giulia has a marketing background, as she got her Master’s Degree in Management and Marketing at Bocconi University (Italy). She also holds a PhD in Management Science from ESADE Business School (Spain) and a Post Doc from BI Norwegian School of Management (Norway).

Giulia believes that design and design practices are the right way to go for making companies more innovative in their DNA and preparing them for the behavioral, technological and cultural revolutions of the future. So her current research focus is on understanding how design practices and capabilities can be effectively and permanently integrated in the innovation strategy and processes of companies. Additionally, she is interested in what makes a great Chief Design Officer and why each company (and institution) should have one.

PART II

Configuring a strategic design project
Main characteristics of the political enabler

**Characteristics:** strong ownership / diffuse vision

**Main challenges:** lack of widespread understanding and support from organizational stakeholders

**Leadership goals:** create a vision that inspires enthusiasm throughout the organization

**Needed team:** guru thought leader(s) and a strongly motivated team

### Type 1 – The political enabler

This quadrant houses strategic design projects characterized by strong ownership and organizational support for innovation, but whose vision is diffused. These are projects where there are multiple ambitions to satisfy and differing opinions about which direction to take – resulting in the lack of a common, unifying vision, or in a vision that is an inappropriate fit for the desired goal. There is a need to combine different areas of expertise and a variety of departmental interests – often resulting in a state of overwhelming complexity that hinders the smooth and timely execution of the strategic design project.

In this context, design professionals can act as political enablers, by identifying the key objectives, key stakeholders and key expertise needed for the successful completion of the project, and facilitating their convergence towards a common vision. Convincing a client or an organization to rethink their vision is, in most cases, not very welcome news. The design team needs to act as a thoughtful, careful and trustworthy unit.

![Figure 3.5: A screenshot of the Alltranche app](image)
Case: Allerhande, a cooking app for Albert Heijn

Context
Albert Heijn – the Netherlands’ leading food retailer, and renowned for the momentum of their innovation – asked Fabrique to co–build a cooking app for Allerhande, one of their sub–brands. Since 1956, Albert Heijn has published a free print magazine about food and cooking, where the company’s vision and brand statement is also broadcast clearly and distinctively. The magazine’s role and purpose – its vision and branding attributes – were commonly understood and accepted across the company. At the start of this project, however, it became clear that there was no previously defined vision of the kind of digital experience they wanted the cooking app to deliver, and how the app would fit into the overarching company vision. Nevertheless, there was a great product owner who championed the project within the team and the entire organization, so much so that the whole design team was willing to exert extra effort and make it work.

Solution
Through a series of creative workshops with product owners, Albert Heijn and Allerhande brand managers and content managers from a media agency, Fabrique designers used their creative facilitation skills to collaboratively develop a solid project vision that defined where the product would go and how the team would get there. The team created an ‘interaction vision’ and a plan to implement an agile development environment within the company where all parties involved could better understand the vision and contribute to the app’s development. The app was launched in October 2014, and became a huge success (see Figure 3.3). Thanks to the strong and coherent vision behind it, Albert Heijn has been able to maintain, nurture and develop the application as part of their customer touchpoint strategy.

Take–away
As the example shows, the team of designers played the role of political enablers by using creative facilitation techniques to distil a vision that united different parties and stakeholders within the company. There is no strict way to handle this. Designers could use vision creation tools like ‘VIP’ (Hekkert and Van Dijk, 2011; see also Chapter 1) or ‘frame creation’ (Dorst, 2015) to get key stakeholders around the table and moderate the discussion in a way that any conflicts of interest would be openly addressed and dissolved, which makes room for a common vision to emerge. In any situation, it’s important to make sure the vision is shared by all the relevant people and departments in the company, since the designer’s aim is to move to quadrant 2.
Take-away
In type 3 projects, there is a high risk of project failure. The NMM case shows however, that catastrophe can be warded off by developing awareness of the circumstances and eventual need to confer responsibility onto those with greater expertise. Being brave enough to perceive professional shortcomings and confront clients/stakeholders is the most essential part of moving a type 3 project into a type 2 or 4. This skill therefore asks for a senior designer who shows authority and has excellent reflective and confrontational skills.
Type 4 – The coaching leader

In this quadrant there is a clear vision. However, although the direction the innovation needs to take may be evident, the organization is not ready for it. There is no ownership, there is often no budget and the organization is unaware of or does not have enough ambition to implement new products and/or services. Thus the complexity resides in the implementation, rather than in the conception of the design. The type of leadership that design professionals can employ to simplify this kind of process consists of coaching organizations in project implementation, which progressively creates ownership. Thus, design professionals should take the lead in executing the project according to the vision, and at the same time teach the organization the necessary tools, methods and principles. (For more on this, please refer to Chapter 8.) The vision acts as a driving force for creating ownership.
In this chapter, we report our findings from a study of the working methods of Dutch design consultancy npk design, to illustrate the kinds of practices that help designers to create process understanding. npk design is a recognized Dutch design consultancy that manages the entire development process from strategy and ideation to engineering, prototyping and production support. We present, in depth, two innovation projects that were completed by this design agency (See boxes 1 and 2).

npk design divides the innovation process into three phases: strategy, design and realization. The strategy phase focuses on defining the problem that will be
solved in the project as well as exploring the context in which the solution for that problem will be introduced. The strategy phase ends with a design brief that describes the solution space. Ideas for the solution are developed in the design phase, after which a selected idea is prototyped, tested and engineered.

Finally, in the realization phase, the engineered solution is produced. In this final phase, npk design guides the production of the solution developed for its organizations. The role of npk design in realizing the solution ends when the first series of the solution is delivered.
Aligning the Organization through Customer Stories

MARZIA ARICO
Livework

MELVIN BRAND FLU
Livework
The business world is slowly waking up to the incredible potential design has to achieve impact for customers and organizations. Organizations are realizing that traditional ways of solving business challenges – process improvements, automation – do not lead to tangible benefits beyond a certain point. Design disciplines such as strategic design and service design, as well as methods like co-creation and customer journey mapping, offer alternative solutions that question the assumptions that underlie a problem, reframe the challenge and ultimately point towards unexpected solutions.

Yet this shiny façade of growing possibilities for design practice hides a much darker, more chaotic situation. Designers are trained to operate at the edge of business development, and thus many of them lack a profound understanding of how organizations operate day to day. Designers are often trained to explore and make sense of what organizations say they need and expect – they may sometimes be trained to perceive what is technically feasible, but very often have a limited understanding of what creates business value, and most importantly, how to navigate the organizational maze of politics, policies, processes, procedures and practices. The deficiency of their understanding becomes strikingly apparent during the design of new services, that, in order to be delivered, necessarily depend upon the coordination of a number of different departments, and often require organizations to effect changes to the operations that structure these domains. Falling to take into consideration existing organizational structure during the design stage will certainly mean failure at the service implementation phase.

Over our last 16 years at Livework, we have experienced all of this first hand. Livework is one of the first service design agencies in the world. Since very early in its inception, agency founders Lavrans Levlie and Ben Reason have been shaping the discipline and practice of what is
today called ‘Service Design’ from the ground up. In 2012, new partner Melvin Brand Flo joined the venture. Melvin is not a designer, but a professional with a business consulting background. Joining together a business perspective with a designerly one has enabled Livework to address organizational development that is increasingly strategic in nature, and served to further professionalise their inter-organizational relationships.

This chapter is the result of a deep reflection on the journey made so far. It contains some of Livework’s most central insights, with the conviction that these will be useful and relevant for strategic designers struggling to be effective in the context of their client organizations.

Three principles actively drive our work. These are *Nail the Customer Story*, *Translate the Story Across Different Business Units*, and *Design for Multispeed Impact* (Figure 5.1). The three principles together seek to ensure that any strategic design outcome we produce is aligned with the client, the client’s business and the client organization. Therefore, by using these three principles in practice, our designers are able to obtain and utilize a profound understanding of a given context – the combination of an organization’s needs, wants and expectations, plus their business drivers and capabilities. Articulating this understanding can enable design professionals to clearly perceive the organizational context in which they are operating, and will ultimately present
The AirShr founders applied a very simple iterative approach to design and development, the so-called 'lean' start-up approach (see Figure 6.9). In each iteration, they defined what they wanted to achieve. Then they would build a version of the technology and test it with listeners and radio staff to identify issues and insights, which they applied to the next revision. This approach helped them to rapidly uncover and address technical and workflow (feasibility) requirements.

It would have been very difficult to predict these requirements up front.

Feasibility questions asked in every iteration:
- Does the technology deliver our user experience targets?
- Are we getting the right data from the radio station?
- Can the radio station cope with the additional workflow?

As the AirShr co-founders embarked on this journey, they knew what they wanted to achieve. However, they did not know how they were going to achieve it – they had no idea of its ultimate feasibility. Although they encountered many technology and workflow roadblocks along the way, the multidisciplinary team’s shared vision and focus ensured that they worked together to find a solution to each problem.
1. Listener test
A basic voice recorder app to measure how often listeners hear something on the radio that they want to remember. Testers kept this app open while driving, and tapped the button whenever they heard something they wanted to keep.

2. Proof of concept
The radio data was faked by manually entering it. This was sufficient to sell the service into a regional radio station who would conduct the pilot.

3. Regional pilot
Working closely with a small regional radio station, Airthr successfully integrated data and aligned to its workflow. Various methods of promoting Airthr on-air were tested to attract listeners to the platform.

4. Metropolitan launch
The insights from the pilot enabled Airthr to integrate with a much larger metropolitan radio network with much more sophisticated technology. The larger station presented a new set of technical and workflow challenges.
What a ‘viable’ strategic design solution is will naturally depend on the individual circumstances of an organization and the solution proposed. However, general principles can be applied, in that any design solution should aim to relate to a genuine (strategic) business opportunity or challenge, generate value in relation to the business opportunity or challenge, and be implemented and recognized as ‘successful’ by the organization and its key stakeholders.

First, let’s start by examining what may be problematic in design projects:

- **Business objectives are ill defined.** Management has an idea about what they would like to do, but no specific or meaningful success measures are set, which may result in difficulty determining the impact of the design solution on ‘hard’ financial metrics.

- **Designers will explore the problem and potential solutions until they find one that they believe is well suited.** Viability is then often fitted to the design solution as an afterthought – that is, after the solution has already been developed and prototyped with customers (as seen in Figure 7.1 below, in the ‘Deliver’ stage). Because the solution is attractive to customers and seemingly makes sense to everyone, its viability is often taken for granted. This can be problematic, for example, because the market segment targeted may not be large enough to meet the firm’s business objectives, or the price that customers are actually willing to pay may be much lower than anticipated.

  - The implementation context might not be sufficiently considered. This leads to challenges realizing the solution, and measures are not in place to monitor how the solution meets key financial milestones.

The key tool to manage the viability of a strategic design initiative is a **business case**. Simply defined, a business case is a justification for a proposed undertaking on the basis of its expected commercial benefit. Business casing typically involves financial modelling, which can be defined as translating a set of hypotheses (assumptions) about the behaviour of markets or customers into numerical predictions and measurable outcomes.
While there are many techniques to model our future returns, most of them are not well suited to innovation projects. The challenge when designing a new business model, a new offering or a new experience is that existing parameters cannot be used and new assumptions often have to be made.

One ‘assumption–based planning’ technique, which is better suited to innovation initiatives, is Discovery-Driven Planning (DDP) (McGrath and MacMillan, 2009). Enhancements to the technique have been provided by Van Putten and MacMillan (2009), who call their extended approach ‘Opportunity Engineering’ (OE).

For those designers who wish to focus on business and financial modelling skills in their work, the suggested books above on DDP and OE will provide detailed, step-by-step instructions.

For a high level demonstration of how these techniques can be practically applied, we will work through a real–life example below by applying the key practices of DDP, as well as the fields of Strategy and Finance, aligning them to the well-known ‘Double Diamond’ design process (Design Council UK, 2007).

Case study

Scenario:
For this case study, we will use the pseudonym Oz Bank to represent a large player in the Australian financial services market providing a comprehensive range of banking and wealth management solutions. Oz Bank would like to develop new financial services for female entrepreneurs to gain greater market share within this growing customer segment.
Designers thus have an interest in building closer ties with key players across teams within the organization— not just to secure buy-in and ownership, but also to provide much needed mutual support— related to design principle 2. Clarifying which horizontal and vertical unit these ambassadors may be positioned in, through mapping the organization, can be helpful.

Designers often have to deal with changing conditions of an organization and design project— project team members could leave the organization, or be taken off projects to attend other organizational needs/projects, or design ambassadors might step away from their role due to frustrations with the potential challenges they face when promoting design internally. Designers need to be resilient, and ready for the hard work it will take to potentially re-train or re-educate organizational members. In anticipation of potential changes, designers can define ‘rules of engagement’ that set expectations for anyone involved in the project. Defining such expectations helps everyone to understand priorities and no-go areas. Rules of engagement frame designers’ efforts to ensure successful customer-centric solutions that are desirable, viable and feasible, and to scale human-centred design capability across the business to enable others to practice the approach. Figure 8.1 illustrates one way to do this, taken from a recent design project.

Figure 8.2 outlines some strategic questions to ask in relation to these rules of engagement.
Designers cultivating a capacity-building mindset must take into account the specifics of any project and its context. A client organization’s internal culture is the central context in which designing unfolds, and as such designers need to make themselves keenly aware of its dominant traits. Refining the accuracy of this perception goes hand in hand with supporting the transformation of that culture into one that practices effective design thinking.

As a start, designers can ask important questions such as ‘how does the organization work?’ This kind of ‘cultural auditing’ and awareness building helps designers to better anticipate potential hurdles or intut levers for design that stem from values, common practices and culturally-informed expectations. (Please refer to Chapter 6 for a more detailed list of feasibility success factors.) For instance, the existing culture might be risk- or failure-averse – any waste of resources and effort must be minimised. Many organizations perform daily routine protocol checks, or large investments might require multiple sign-off stages across decision-making levels, or company expectations around innovation might focus on finding safe solutions with manageable risks. When a designer intentionally sets about exposing these underlying cultural traits, that audit will reveal conditions that would likely make it harder for the organization to embrace certain design principles, or dynamics that could block the application of effective design practices.

While it might be easier for seasoned designers to influence the direction an organization will take, even junior designers can significantly shape internal context such that sponsors and decision makers are pleasantly surprised by outcomes, and want other
interactions and interventions on-site should also help them determine what motivates employees, what bothers them, and where opportunities exist to create experiences that change perspectives and attitudes, and model new mindsets. Doing so helps employees identify with design-driven organizational change, feel more empowered and co-responsible while contributing momentum to the initiative. For instance, one designer constructed an intervention that had employees map out their existing core beliefs about the firm and its business context, and then asked them to collectively turn each on its head by asking ‘what if...?’ (see also techniques developed by de Jong and van Dijk, 2015). These newly-defined beliefs led to fresh implications for customer and employee experiences, and conceiving of unique outcomes. Compromising beliefs were exposed and challenged, and concrete ways of embracing alternative positions became apparent – effects which may also serve to map out the bigger picture and include a broader variety of stakeholders, and the impact that the organization has or is seeking within their community.

Ideally, a client organization already has someone like a Chief Design Officer, whose role it is to focus on design and strategic decision-making. Cultural change can be facilitated by external designers, but ideally is supported through internal design ambassadors and a design leader with real authority – like a chief design officer, or a design director. If such a position and person doesn’t exist yet within an organization, it might be helpful for the designer to point out the benefits of having one, and potentially even facilitate efforts to recruit one. Ultimately, design shouldn’t just be the task of a design leader – it should be the responsibility of every member of an organization. It is the cultural responsibility of every employee to recognise and be sensitive to customer needs and desires, to hit the alarm bell when customer ‘pain points’ and market changes emerge, and to understand the impact of an organization’s actions on customer experiences. Equipping stakeholders with customer-centred radar via basic customer-experience research is an essential way designers can facilitate cultural change. Customer empathy and a sense of accountability for their needs are central to building a culture that commits to design. For example, designers might ask relevant employees to imagine customer experience, jointly reflect on this, and develop specific key performance indicators together with other employees and management – the process will ensure that employees’ priorities are aligned with desired customer experiences.
Designers can support the transition towards cultural change by being open to experiment, even within certain boundaries, including a strong concern for viability and feasibility (please refer to Chapters 6 and 7 for more on this). While such concerns help designers reduce their risk of failure during experimentation and implementation, it is important to emphasise in working with clients that design values continuous change and evolution – and a culture that accepts that designers are ‘always in beta mode’. A solution and experience context is never complete when key performance indicators are in constant need of adaptation. Over time, new opportunities emerge – coincidentally or purposefully – to improve the

Figure 8.3: Participatory design methods (Playful Triggers and Scenario Cards) are used in a training course with Australian emergency management staff to develop capacity in a community-centred approach to strengthening disaster resilience (Image credit: Yoko Akama)
Strategic design

“If you are a designer and want to better understand and develop your strategic potential, this book is for you! This book offers eight strategic design practices for design professionals who seek to grow or have already grown into a more strategic role in innovation. These practices have been distilled by expert strategic designers (from, for instance, Philips, Fabrique, npk design, Lifework, Reframing Studio) and researchers in the field of strategic design. The practices are illustrated through tools, methods, cases and guidelines that together will enable you to quickly familiarize with them and get ready to apply them in your next strategic design project.”

Giulia Calabretta, Gerda Gemser & Ingo Karpen