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"A user" in the context of this document:

A person who uses the service / product or is a current or potential customer or client of your organisation.
About this toolkit

What is it?

This collection of carefully selected user-centred design tools has been built to complement the HCD workshops. These workshops are especially designed for participating NGOs. It is an initiative of the NSW Department of Finance, Services and Innovation, and designed and facilitated by FutureGov.

The tools included will lead you through the design process from start to finish. Every technique in this book has been tried and tested on FutureGov projects around the world.

The toolkit is about action, not theory. Each resource has been specifically designed to be easy to understand, easy to try out, and easy to learn from.

Who is it for?

Regardless of your team or your title, anyone who wants to improve their process of designing a solution for their users can use and benefit from the methods listed here.

Especially for those who have attended the workshops.

How should I use it?

There’s no wrong way to use this toolkit. However, here are a few opportunities where these techniques might be especially helpful.

As a way to understand the issues you’re facing.
What’s really going on with your service area? Before you start thinking about solutions, spend some time reconsidering the problems. You might uncover something new!

As a thought starter when scoping new projects.
Are there new tools that might help you reach the outcomes you want? Read over the examples and build in time for these approaches from the beginning.

As a path to spending less and getting more in return.
User-centred design lets you explore solutions quickly and cheaply. Rather than investing in a big rollout and hoping the consultation goes well, use these tools to find out what people really need.
Things to remember

1. Listen to your users

Creating a service or product that meets your own needs is always easier than tailoring it to your end users. But if you want your service to work as effectively and efficiently as possible, listening to your users is essential.

TRY IT

Start by figuring out who your product or service should be designed for. This can be a difficult thing to pin down, but generally speaking a product that is “for everyone” will in fact appeal to no one.

Put up pictures of your end users to remind yourself who you’re building for. Ask colleagues to give you feedback from a user perspective -- or better still, visit your actual end users and ask for feedback directly.

Most importantly, keep asking yourself "Is this what our users need?" If the answer is no, don't be afraid to try something new.
Things to remember

2

Tell stories

One of the most powerful ways to help people understand a problem is to tell them a story. When you can speak compellingly about the things you see and hear during your research, people will be more likely to listen to and remember what you say.

Don't forget visual aids, photos, drawings, or screenshots -- images often stay in people's minds longer than words do.

TRY IT

If you're struggling to tell your story, try drawing it instead. You don't have to be "good" to benefit -- even the simplest sketch can help get things out of your head and make them easier to understand.

Create an environment where it's easy for people to visualise things by making sure sticky notes, large sheets of paper, and pens are easy to find.
Things to remember

Don’t be afraid to ask why

Designers often have the advantage of coming at a problem from the outside. This lets them see things with fresh eyes and question things that may have become taken for granted within an organisation.

Even if you think you know what’s happening, ask questions as if you didn’t. This “productive ignorance” can throw up new options and possibilities “insiders” might not have been able to see.

TRY IT

Ask someone from another team to act as a "critical friend" -- someone who observes and gives constructive feedback -- during a presentation or meeting.
Things to remember

4 Be open and collaborative

The more you know about a problem, the more innovative your solution can be. Share your process and ask for input at every stage.

TRY IT

Send weekly updates to people who have contributed to the project. Explain what you’ve been up to and what you’ll be doing next. Try creating an online space (Twitter, Pinterest, a blog) or physical space (a wall, a room) where you can share what you’re up to and let anyone who wants to check in.
Things to remember

5

Iterate, iterate, iterate

A key part of this way of working is a style of project management called "Agile". Instead of planning the whole project from the beginnings, teams learn and respond to new information throughout the course of their work. Agile working lets people adapt both their ideas and their ways of working.

TRY IT

Meet regularly with the project team to discuss your progress. Ask yourselves these three simple questions:

- What did I do yesterday/the last time I worked on the project?
- What will I do today/the next time I work on the project?
- What blockers do I face?
Design process: **Discover**

**Understand the problems**

**WHAT IT IS**

‘Discover’ is about understanding the situation, as well as the people you’ll be designing for. This phase is about looking at the wider picture: it’s important to talk to users, make observations, investigate, and analyse the data you have available. Learning and challenging your assumptions -- as well as your users' assumptions -- is key.

**WHY DO IT**

The discovery process helps you make sure the problem you’re focusing on is the right one. It also helps you to refine the parameters of your work. Speaking to people directly affected by the issue at hand will help ground your solution in their experience, not your assumptions.

On the following pages, we’ve included some recommended activities and tools to help you get started with your own Discover phase.
Discover: **How?**

**Look for clear patterns and create initial hypotheses**

<table>
<thead>
<tr>
<th>ACTIVITIES</th>
<th>TOOLS TO HELP YOU</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PLANNING RESEARCH</strong></td>
<td><strong>Research Plan</strong></td>
</tr>
<tr>
<td>Use this worksheet to help plan your objectives and questions before you speak to your users</td>
<td>Page 11</td>
</tr>
<tr>
<td><strong>INTERVIEW</strong></td>
<td><strong>Capturing User Needs</strong></td>
</tr>
<tr>
<td>This will help you see not only what your users say, but also what they think, actually do and feel.</td>
<td>Page 12</td>
</tr>
</tbody>
</table>
Research Plan

**WHAT IS THIS TOOL?**
Use this tool to help you plan your research objectives and questions for user interviews.

**TIPS**
Start your questions with ‘how’ or ‘why’. Make your questions open and interesting, avoid any leading or biased questions and think about answers you couldn’t get from a survey — this is about having a conversation.

Visit your client in their environment. Try to get them to show you around and demonstrate the things they talk about.

Who are your users?  
How do you find them?

What do you already know about what your users think, feel and do?

What do you want to find out?

What questions can help uncover those answers?
Capture User Needs

WHAT IS THIS TOOL?
This tool will help you document your research.

TIPS
Record the information you collect from users. Don’t just pay attention to what someone says -- also pay attention to how they say it.
Define the problem

WHAT IT IS
At the end of your discovery phase, you are likely to have a lot of insights and data that point to a number of problems to solve. The define stage is when you will need to synthesise your insights and identify the one specific problem you want to solve.

WHY DO IT
Before you start to think about solutions, it’s important to structure what you learned during the discovery phase. The process of understanding and clarifying the problem you are trying to solve will help you keep the users’ needs in mind throughout the rest of the process. There will be lots of data to analyse, but particular themes or stories are likely to recur -- those are the areas to focus on.

On the following pages, we've included some recommended activities and tools to help you get started with your own Define phase.
Define: How?
Define the problems

**ACTIVITIES**

**HOW MIGHT WE...**
Re-frame your problems into statements that start, “How might we...”. Doing so encourages people to find a solution instead of focusing on what’s wrong.

**USER JOURNEY MAPS**
User journey maps help you understand someone’s entire relationship with your service from start to finish. They tell the story of someone who has used the service, which touchpoints and actions the user has come across, and what pain points/opportunities the user experienced.

**TOOLS TO HELP YOU**

**HMW Statements**
Page 15

**User Journey Map**
Page 16-17
"How might we..." statements

WHAT IS THIS TOOL?
So far, you have generated insights through user research. “How might we” statements help you narrow down those insights and focus on one consideration at a time. Make sure you centre these statements around your users.

TIPS
A good How Might We should give you both a narrow enough frame to let you know where to start your Brainstorm, but also enough breadth to give you room to explore creative ideas.

<table>
<thead>
<tr>
<th>How might we</th>
<th>(action what, ie. help / create)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>so that</th>
<th>(who can benefit what)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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<tr>
<th>so that</th>
<th>(who can benefit what)</th>
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<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>
User journey

WHAT IS THIS TOOL?
This journey map template will help you to visualise a person's entire experience when using your product or service.

Start by listing each action users take from start to finish. Map those actions to the touch points between the user and your organisation.

Next, document your users' feelings -- how they felt at each step. Add memorable quotes from people you have talked to.

Lastly, identify opportunities. Pay attention to the lowest points of the emotional journey and to repetitive actions people take. Use these low points as opportunities to discover new ideas and solutions.

See the following page for a completed example.

<table>
<thead>
<tr>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the steps each user must take?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FEELINGS</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are your user's feelings?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>QUOTES &amp; THOUGHTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>What does your user say and think?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TOUCHPOINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>How is the user interacting with you and other related organisations?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INSIGHTS &amp; OPPORTUNITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which moments in this journey can be improved?</td>
</tr>
</tbody>
</table>
## User journey
### Example

<table>
<thead>
<tr>
<th>ACTIONS</th>
<th>Sign up</th>
<th>Browse</th>
<th>Enquire</th>
<th>Book</th>
<th>Print</th>
<th>Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>FEELINGS</td>
<td>🌟</td>
<td>🔴</td>
<td>🔴</td>
<td>🔴</td>
<td>🔴</td>
<td>🔴</td>
</tr>
<tr>
<td>QUOTES &amp; THOUGHTS</td>
<td>&quot;my friends told me it was good, but when I tried to book, it was a complete nightmare&quot;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOUCHPOINTS</td>
<td>Website</td>
<td>Email</td>
<td>Facebook</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>INSIGHTS &amp; OPPORTUNITIES</td>
<td>Providers need to be transparent about availability so users don't try to book if they're full up</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Create ideas

Design process: Develop

WHAT IT IS
This phase is all about coming up with ideas. Group sessions allow you to bounce ideas off one another and, even more importantly, to build on others’ ideas. People are their most creative when collaborating with others with different backgrounds, so try to organise as diverse a group as possible.

WHY DO IT
By now, you already have a lot of new ideas. Now it’s time to expand them, finding inspiration from the world around you. There are many ways to address a problem, and the most obvious isn’t always the right one. Exploring lots of solutions quickly will help you think through the problem in more detail and uncover unexpected ways to solve it.

On the following pages, we’ve included some recommended activities and tools to help you get started with your own Develop phase.
Develop ideas

**BRAINSTORMING**

Organise a group to generate ideas together. Make sure to carefully structure the brainstorm so that everyone understands the brief and has the space to share their thoughts. A structured brainstorming session helps generate more ideas and makes sure everyone has a chance to express their opinions.

**TOOLS TO HELP YOU**

Six Ideas in Three Minutes
Page 20-21
Six ideas in three minutes

WHAT IS THIS TOOL?
When it comes to ideas, quantity matters too. More ideas are better, because they give you lots of options to choose from (and people feel more relaxed about discarding the ones that don’t work).

Don’t be afraid to sketch out your ideas -- even if you can’t draw! Having a visual example makes it much easier for others to understand and build on.

See the following page for a completed example.
Six ideas in three minutes

Example

1. Paint bins BRIGHT pink
2. Encourage local cafés to use less packaging
3. Recycling tokens for every piece of litter
4. Let rubbish build up so people see how much is dropped!
5. Litter 'police'
6. Musical bins
Design process: **Deliver**

Test your solutions

**WHAT IT IS**
This phase is when your idea becomes real and usable. You might build a piece of technology, restructure a team, redesign a space, create a new set of communications, or create a whole new service. The key to this stage is that you develop a mindset of experimentation and get comfortable with a constant rhythm of testing, learning, and iterating. The best services and products are never “finalised” -- they’re always improved.

**WHY DO IT**
Delivery is where you can see your ideas become reality. It’s your opportunity to create a tangible solution that users can interact with, and to measure the positive difference your ideas have made.

On the following pages, we've included some recommended activities and tools to help you get started with your own Deliver phase.
Deliver: **How?**

**Test your ideas with real users**

<table>
<thead>
<tr>
<th>ACTIVITIES</th>
<th>TOOLS &amp; RESOURCES TO HELP YOU</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PLANNING YOUR TESTING</strong></td>
<td>Test planning template</td>
</tr>
<tr>
<td>Use the test planning tool to work out what you need to test, how you’ll carry out testing, and who you’ll need to speak to. Continue to evaluate your ideas against the design principles to make sure your concepts stay relevant.</td>
<td>Page 24-25</td>
</tr>
</tbody>
</table>

| **DOCUMENT YOUR FINDINGS** | Test findings template |
| Record the information you collect during your testing sessions. | Page 27 |
Test planning

WHAT IS THIS TOOL?
This is a template to help you create a test plan for getting feedback on ideas and on your prototype.
Identify what you want to find out by testing your prototype. Plan your testing sessions to generate the feedback you need.

See the following page for a completed example.

What is the objective of your test and what are your assumptions you need to test?

Who do you need to test it with?
There might be more than one user group.

How could you test this?
What do you need to make it happen?
Think about space, tools, timing, and how you will record and share your results.

What questions will you ask?
What tasks will the participants need to complete?
Avoid any leading or biased questions like “Do you like this?” Instead, ask questions like, “Who would use this?” “What would you expect to happen next?”
Test planning
Example

<table>
<thead>
<tr>
<th>What is the objective of your test and what are your assumptions you need to test?</th>
<th>How could you test this? What do you need to make it happen?</th>
</tr>
</thead>
<tbody>
<tr>
<td>To find out if technology wearables affect the amount of exercise young people do</td>
<td>Recruit young people, review and choose existing apps to test with initially</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Who do you need to test it with?</th>
<th>What questions will you ask? What tasks will the participants need to complete?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young people, aged 12-18 Health professionals</td>
<td>Participants will need to wear the device and use the app for 1 month and we'll track their activity regularly over the phone</td>
</tr>
</tbody>
</table>
Test findings

WHAT IS THIS TOOL?
This tool will help you record the information you collect during your testing sessions.
You may collect feedback on sticky notes; this makes it easy to cluster the feedback and identify common themes. Another option is to write directly on this template.
Observe carefully -- pay attention to how things are said in addition to what’s said.
See the following page for a completed example.

- How easily did the person complete the task?
  - No problems
  - Many problems

- What did the person say? When?

- Where did you observe problems in the user’s journey?

- What did the person do? When?

- What worked particularly well?
Test finding
Example

How easily did the person complete the task?
No problems

Where did you observe problems in the user’s journey?
- When trying to find information online about filling in their tax returns
- When contacting the customer services team with a simple question

What did the person say? When?
"This feels like a really straightforward question, like something loads of people would want to know the answer to — why isn’t it online anywhere?!"

What worked particularly well?
- Once connected, the online chat feature enabled the user to get their question answered

What did the person do? When?
- They tried calling but gave up when they were told they were 11th in line!