03 EMPATHISE

USAID
FROM THE AMERICAN PEOPLE

AGA KHAN FOUNDATION

Developed by: Accelerate Impact

Created for **Local Impact**: A Transformative Partnership in Asia and Africa

EMPATHISE

Use the tools and resources in this guidebook to accomplish the goals below. Once your design team has achieved these objectives, you will be in a strong position to advance to the next phase in your design process. Use the reflection tools in the **Design Work Journal** to evaluate whether your design team is ready to move to the next phase.

Develop a research strategy based on the needs of your project

Determine responsibilities amongst members of the team and coordinate the logistics for your fieldwork

Put aside your understanding of the problem in order to empathise with the experiences and needs of the stakeholders closest to the problem

Engage stakeholders in the field, listen carefully to their stories and document your findings

Reflect on what you learned from your fieldwork in order to better understand the needs and motivations of the stakeholders closest to the problem

Iterate your design research strategy to adapt to emerging needs

Identify the stakeholders who provided the most insight into the problem

Begin to narrow in on the most relevant and surprising observations you gathered as a team

CAPTURE YOUR WORK

PROCESS TIPS

MINDSET TIPS

EQUITY STRATEGY

CO-DESIGN STRATEGY

FIELDWORK

EMPATHISE

It is critical to the **Human-Centred Design** process that we gain empathy for the stakeholders we are serving though our design decisions. This means conducting design research in the field in order to more deeply understand the context, the stakeholders that are currently involved, the current circumstances of the problem and how the challenges are being addressed today. In the **Empathise Phase** you are learning this information through the eyes of the beneficiary.

WE MUST EMPATHISE WITH THOSE WE ARE SERVING IN ORDER TO IDENTIFY AND SOLVE THE PROBLEMS THAT MATTER THE MOST TO THEM.

What steps can we take to ensure we deeply understand the context and complexities of a development challenge from the perspective of the community we are serving?

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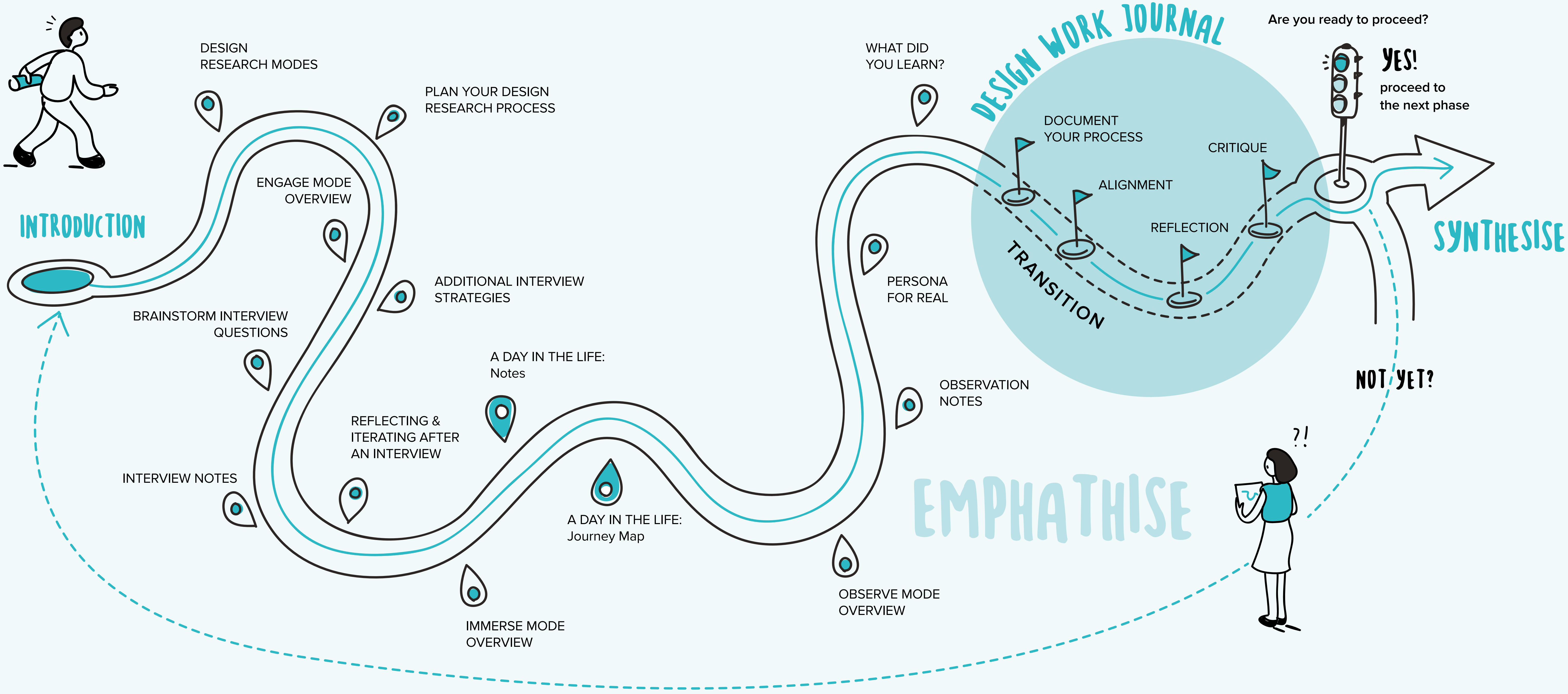
TABLE OF CONTENTS

You can find a video lecture as well as more articles on this phase of the **Human-Centred Design** process in the **Resource Book**. You will also find a full demonstration example of each of the tools in there. Scan the QR code or click here to access this resource.



OVERVIEW OF EMPATHISE PHASE

Tools in the **Empathise Phase** are designed to help your team understand the experiences, emotions and motivations of others. Designers use specific design research methods to learn more about the needs of the stakeholders for whom they are designing.
Preparation for this part of the process should be done as a team. This phase of the design challenge will include: preparing to interview, interview questions and additional techniques, interview reflection tools, and observation and journey mapping tools.
Also included is an activity of shadowing a stakeholder. Preparation and reflection tools are provided for the shadow experience.

OBJECTIVES OF EMPATHISE PHASE

The goal of this phase is to engage with the most relevant (and most underrepresented) stakeholders related to the problem you are working to solve.
This phase is focused on having dynamic conversations and gaining new perspectives through one-on-one conversations as well as immersion and observation experiences.

At the end of this phase, all team members should have engaged in at least three interviews and captured notes from those interviews. Ideally team members would also participate in some immersion and/or observation activities.

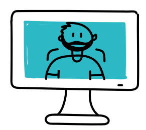
MINDSETS OF EMPATHISE PHASE

- Elevate the lived experiences of stakeholders to be as important as technical expertise
- Look carefully to understand potential problems and opportunities
- Stay optimistic that you can solve the problem
- Hold back on solving the problem until your team has learned from stakeholders
- Get inspired by people -- active listening is a source of creative inspiration
- Put aside biases and assumptions about what you think the problem is - listen to the stakeholder
- Seek new perspectives on old problems

Scan the QR codes on page 46 for the following resources:

- Emphatise **Mural Template**
- **Design Work Journal** PDF
- Design Work Journal Mural Template

EMPATHISE: TEAM ACTIVITIES



When you convene your design team, use these hands-on, immersive activities to help build your design skills and mindsets. An important part of these activities is the debrief after -- **don't forget to make time to reflect on what you learned as a team.** Begin the collaborative session with one of the following improvisation activities:

Use these activities to practice active listening and empathising with other people's perspectives.

LONG LOST FRIEND

Goal: Everyone wanders around and people stop to greet a partner according to a scenario that the facilitator calls out.
The facilitator calls out...

Instructions:

1. Your partner is a long-lost friend.
2. You're 70% sure your partner is famous.
3. You shared an awkward interaction last week with your partner.
4. Make up your own!

Online Adaptation: Call out the role play and then send participants into breakout rooms with one other person. Give them 1 minute to act out the role play and then call them back. Give the next role play and then send them to a new breakout room with a new person. Call them back after 1 minute. Repeat.

Debrief Questions:

- What was it like reacting to different scenarios?
- How did it change your response?

HOW ARE YOU DOING, REALLY?

Goal: This exercise is designed to help participants connect with each other beyond superficial small talk. This also helps participants get into a mindset of active listening.

Instructions:

1. Everyone gets post-its and a thick black marker (Sharpie).
2. Facilitator asks the group "How are you, really?"
3. Each person writes their answers on post-its and sticks them to their shirts (e.g. tired, anxious, excited, thirsty, etc.).
4. Everyone mingles, discussing stickies that prompt conversation.

Online Adaptation: Have everyone write three post-its with their reflections. Send participants into breakout rooms with one other person. Give them 5 minutes to share their post-its and discuss and then call them back. Send them to a new breakout room with a new person. Call them back after 5 minutes. Repeat once more.

Debrief Questions:

- How were these conversations different from typical "small talk"?
- Why do you think that is?

PRACTICING INTERVIEWING

Goal: This exercise is designed to help participants practice asking open-ended questions and actively listening to another person.

Instructions:
Create time during the workshop to practice interviewing each other using the techniques of this phase.

Use one of the following prompts:

- What was your best holiday memory?
- What is your favorite day of the week?
- What is your dinner time like?
- What is your commute like?

Online Adaptation: Send participants into breakout rooms with one other person. Give them 5 minutes to interview each other and discuss. Then call them back. Send them to a new breakout room with a new person and repeat.

Debrief Questions:

- What did you learn about your partner?
- What was it like for you to ask open-ended questions?
- What did you notice about your partner's answers?

EMPATHISE: INTRODUCTION TO TOOLS AND METHODS

At the top of each tool description is the recommended amount of time to complete the tool. Try to spend only the recommended time. If you spend significantly less time on the tool you might not do enough rigorous thinking to advance your project. Also, keep up your project momentum by not spending too much time on each tool.

Design Leads should review this page before the design team is scheduled to meet.
Take note of opportunities to engage the community and plan for that. Gather needed materials.
Take note of fieldwork and help your teammates plan for that work.

Documentation Strategy: Be sure to capture all of your work throughout this process, using the tools provided as the main place to capture your thoughts and reflections. **Remember:** if it isn't written down or captured, you have no evidence of it! Be sure to take photographs and/or screenshots, especially when working with stakeholders and community members. Be sure to ask permission before you take photos of people.

Equity Strategy: Make sure that your team is working to identify and engage those stakeholders, communities and organisations who are under-represented, under-resourced and whose voices are not often heard.

30 minutes

#1 DESIGN RESEARCH MODES

WHAT IS THIS TOOL?

The **Design Research Modes** overview is a resource to help orient teams to the different modes, tools and approaches to design research.

WHAT IS YOUR GOAL?

Review this resource with your team to prepare for the **Empathise Phase** and to plan your approach to design research.

CO-DESIGN STRATEGY

If you are working with community members during this phase, be sure to include them in these conversations so that they feel equally prepared to participate.

EQUITY STRATEGY

As your team is reviewing the different modes of design research, reflect on which modes might be best used for engaging members of the community who are typically left out of the process of influencing or participating in decision-making conversations.

EMPATHISE: TOOLS AND METHODS

30 minutes

#2 PLAN YOUR DESIGN RESEARCH PROCESS

WHAT IS THIS TOOL?

The **Plan Your Design Research Process** tool gives your team guidance on your recommended approaches to design research.

WHAT IS YOUR GOAL?

Review this resource with your team to make decisions about your approach to design research and your plan for how to conduct it.

CO-DESIGN STRATEGY

If you are working with community members during this phase, be sure to include them in these conversations so that they feel that they had the opportunity to influence the decisions of the group.

EQUITY STRATEGY

As your team is making decisions about the different modes of design research, reflect on which modes might be best used for engaging members of the community who are typically left out of the process of influencing or participating in decision-making conversations.

60 minutes to review; 60 minutes per interview

#3 ENGAGE MODE OVERVIEW

WHAT IS THIS TOOL?

The **Engage Mode Overview** is a resource designed to give more information, instructions and tips for teams to conduct their design research interviews.

WHAT IS YOUR GOAL?

Review this resource with your team to prepare for the Engage Mode and planning your approach to this mode.

CO-DESIGN STRATEGY

If you are working with community members during this phase, be sure to include them in these conversations so that they feel equally prepared to participate in the interview process.

30 minutes

#4 ADDITIONAL INTERVIEW STRATEGIES

WHAT IS THIS TOOL?

The **Additional Interviewing Strategies** tool gives you additional tools for engaging stakeholders, particularly young people, those who are marginalised or those who might have a hard time sharing their answers to your questions. You do not need to use every technique. Choose techniques that are most relevant and appropriate for your context.

WHAT IS THE GOAL?

Your goal is to gain a deeper understanding of the problem.
A variety of techniques can help you engage with different stakeholders.

EQUITY STRATEGY

Think about groups who might be most reluctant to share their honest perspectives because of hierarchy, age, gender, cultural difference, etc. Think about which of these strategies might make it easier for these stakeholders to share.

60 minutes

#5 BRAINSTORM INTERVIEW QUESTIONS

WHAT IS THIS TOOL?

The **Brainstorm Interview Questions** tool gives you examples of starter questions for your interviews. You can modify the questions as needed. Then, brainstorm multiple additional questions that you can draw from for your interviews.

WHAT IS YOUR GOAL?

It is very important when you are conducting empathy interviews to ask open-ended questions that are related to the problem you are solving; do not ask the stakeholder to solve the problem. Use this activity to help develop a strong list of questions before you begin interviewing.

CO-DESIGN STRATEGY

If you are working with community members during this phase, be sure to include them in these conversations so that they feel that they had the opportunity to create and influence the influence the questions developed.

EMPATHISE: TOOLS AND METHODS

60-120 minutes

#6 INTERVIEW NOTES

WHAT IS THIS TOOL?

The **Interview Notes** tool helps you capture what you heard from the people you interviewed.

WHAT IS YOUR GOAL?

It is critical to capture notes and reflections of your interviews and share them with your team. The notes you gather will inform the next phase of the design challenge.

60 minutes

#7 REFLECTING AND ITERATING AFTER AN INTERVIEW

WHAT IS THIS TOOL?

The **Reflecting and Iterating After an Interview** tool helps your team to reflect on which questions worked well and which should be discarded or edited. This tool also gives you the opportunity to reflect on new ideas or topics that you want to add to your next interviews.

WHAT IS YOUR GOAL?

When you have completed this tool, your team should have iterated on current questions and developed new questions that you are interested in learning more about through your interviews.

EQUITY STRATEGY

Make sure that your team is reflecting on those stakeholders, communities and organizations who are under-represented, under-resourced and whose voices are not often heard. Ensure that the interview questions you are asking are culturally appropriate. If some questions consistently get a negative response with certain groups, remove those questions.

60 minutes; all day to shadow

#8 IMMERSE MODE OVERVIEW

WHAT IS THIS TOOL?

The **Immerse Mode Overview** is a resource designed to give more detailed instructions and tips to design teams to help them complete their immersion activities.

WHAT IS YOUR GOAL?

Review this resource with your team to prepare for the Immerse Mode and planning your approach to this mode.

CO-DESIGN STRATEGY

If you are working with community members during this phase, be sure to include them in these conversations so that they feel equally prepared to participate in an immersion activity.

60 minutes

#9 A DAY IN THE LIFE: NOTES

WHAT IS THIS TOOL?

The **A Day in the Life: Notes** tool helps you capture the notes and reflections from your shadow experience.

WHAT IS YOUR GOAL?

It is important to take notes and reflect on your shadow experience and share those notes with your team. Those notes will inform your next phase of the challenge.

EMPATHISE: TOOLS AND METHODS

60 minutes

#10 A DAY IN THE LIFE: JOURNEY MAP

WHAT IS THIS TOOL?

The **A Day in the Life: Journey Map** tool helps your team to reflect on what you learned during your shadow experience, using a timeline called a journey map. Journey maps ask you to consider the emotions you experienced as you shadowed.

WHAT IS YOUR GOAL?

When you have completed this tool, your team should have reflected on the shadow experience and how it felt. This process should help your team to understand new perspectives and experiences related to your design challenge.

60 minutes to prepare; 120-180 to observe

#11 OBSERVE MODE OVERVIEW

WHAT IS THIS TOOL?

The **Observe Mode Overview** is a resource designed to give more detailed instructions and tips for teams to complete their immersion activities.

WHAT IS YOUR GOAL?

Review this resource with your team to prepare for the Observe Mode and to plan your approach to this mode.

CO-DESIGN STRATEGY

If you are working with community members during this phase, be sure to include them in these conversations so that they feel equally prepared to participate in the observation activities.

60 minutes

#12 OBSERVATION NOTES

WHAT IS THIS TOOL?

The **Observation Notes** tool helps you capture the notes and reflections from your observation experience.

WHAT IS YOUR GOAL?

It is important to take notes and reflect on your observation experience and share those notes with your team. Those notes will inform your next phase of the challenge.

60 minutes

#13 PERSONA FOR REAL

WHAT IS THIS TOOL?

The **Persona for Real** tool helps your team to reflect on the specific people you met during the design research process. It also helps you capture the most relevant details about these people's lives.

WHAT IS YOUR GOAL?

When you have completed this tool, your design team should gather up all of your notes and reflect on what you learned about specific people you met. This will help you carry those details forward through your design process.

60 minutes

#14 WHAT DID YOU LEARN?

WHAT IS THIS TOOL?

The **What Did You Learn** tool helps your team to begin to identify and capture the most important things you learned from your design research process.

WHAT IS YOUR GOAL?

When your team has completed this tool, you will have identified the most important things you learned using the prompts provided to give your prioritisation process structure.

EQUITY STRATEGY

Make sure that you are including the voices of those stakeholders, communities and organizations who are under-represented, under-resourced
and whose voices are not often heard when you are selecting the most important things you learned.

EMPATHISE: TOOLS AND METHODS

DESIGN RESEARCH MODES

30 minutes

ENGAGE

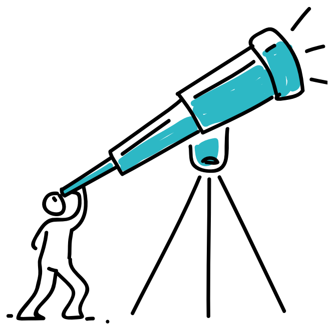
The **Engage Mode** of the design research process is organized around interviewing stakeholders to understand their experiences, motivations, beliefs and needs, both implicit and explicit.

We recommend that every design process include at least some stakeholder interviews. Because this method allows for you to build rapport and have dynamic conversations, we believe it is a critical method to leverage.

IMMERSE

The **Immerse Mode** of the design research process is organized around the design team experiencing the problem and context first hand. For example, in an agriculture project, the design team would spend the day working in the fields alongside other stakeholders. In a transportation project, the design team would use the different modes of transportation and take notes about their experiences.

Conducting an immersion exercise is great for design projects that involve complex experiences with multiple actions, stakeholders and systems. This mode is also valuable for when members of the design team do not have any personal experience with the context or challenges.



OBSERVE

The **Observe Mode** of the design research process is organised around the design team closely observing a context and stakeholders while capturing notes. For example, in a health care challenge, design team members might get permission to observe what happens in the waiting room at a hospital.

Conducting an observation exercise is great for design projects that involve spaces with a wide variety of stakeholders and stakeholder interactions. The Observe Mode also requires less time investment than a full immersion experience.

For more guidance for this tool as well as an example, refer to the **Resource Book** on pages 118 and 121.

Work as a team to reflect on the advantages and disadvantages of each mode.

60 minutes

PLAN YOUR DESIGN RESEARCH PROCESS

Before you head out into the field, take some time as a team to plan your design research process. Answer the questions below to help your team make decisions about the design research activities your team will complete.

ENGAGE

Conducting 8-10 interviews with a variety of stakeholders is recommended.
Every member of the design team should participate in interviews.
Be sure to use at least one additional interview technique (page 28).

WHO WILL YOUR TEAM INTERVIEW?

Refer to your stakeholder map from the **Understand Phase** for ideas. Be sure you are prioritising those people whose voices are least represented - those should be the majority of your interviews. If you interview technical experts, those should be a minority of the interviews.

WHO WILL CONDUCT THE INTERVIEWS?

Conduct interviews in pairs. Work as a team to identify how the group will pair up. When assigning stakeholder groups to interview, take into consideration power dynamics. Ensure that everyone who is interviewing is able to build rapport and create a safe space for honest conversations. For example, do not assign the boss to interview her employees.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 118.

Remember to engage stakeholders from multiple different perspectives, including those who are least represented.

If design teams are struggling to identify the least represented, ask the group to think about those with whom they frequently interact and those with whom they do not.

Remember that your focus when engaging with stakeholders is to learn about their perspectives and experiences, even if what you learn is different from what you expected or different from your own experience.

IMMERSE

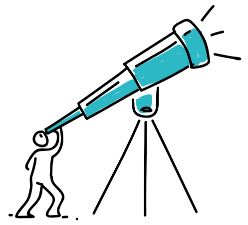
For best results, several of the design team members should complete at least one immersion experience.

WHERE WILL YOU IMMERSE? WHAT ACTIVITIES DO YOU WANT TO EXPERIENCE FIRST HAND?

Think about the activities and environments that are central to the problem you are trying to solve.
Who do you need to ask to get permission to immerse?

WHO WILL CONDUCT THE IMMERSION EXPERIENCE?

Conduct the immersion experience in pairs. Not everyone on your team is required to conduct an immersion, although the more immersion experiences your team conducts, the better.



OBSERVE

For best results, several of the design team members should complete at least one observation experience.

WHERE WILL YOU DO YOUR OBSERVATIONS?

Consider places where your stakeholders are interacting and engaging in experiences related to your design project. If different stakeholder observations are in different locations then be sure you are prioritising those people whose voices are least represented.

WHO WILL CONDUCT THE OBSERVATION?

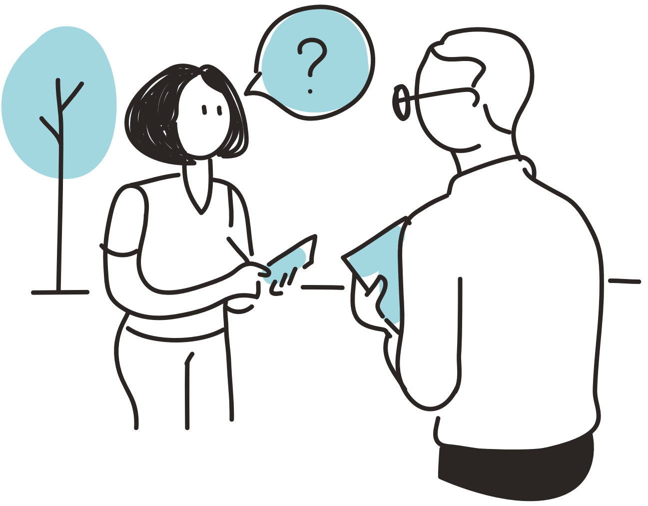
Conduct observations in pairs. Work as a team to identify how the group will pair up. When determining who will do the observations consider dynamics of the place and any social consideration that might make the work more successful.

60 minutes

ENGAGE

PREPARING TO INTERVIEW

Instructions: As a part of the work of exploring this problem, you are going to interview at least three stakeholders. When you interview people, you can engage in a deeper conversation with them. In an interview, you can also ask follow-up questions and really dig for the "why" behind their emotions and motivations. You are working to discover stakeholders' needs so that you can respond to them with your solutions.



1. PREPARING TO INTERVIEW

- Each person on the team will conduct at least two to three interviews with different stakeholders. Your team should interview at least eight people total. Schedule 60 to 90 minutes per interview.
- When you make arrangements with those you want to interview, be sure to give them context for this project. Tell the interviewee that you will be asking them questions about their lives and that they do not have to answer any questions they do not want to answer. Remember that this interview is an invitation for the person to share with you. Show gratitude for what they are willing to share.
- Use the interview questions that are provided on the following pages, as well as those that you write, to start the conversation. Aim for a conversation to discover more about the problem. If you are feeling comfortable and want to ask follow-up questions, feel free to do so.
  - Start with 6-8 questions. Select questions that you feel are relevant to the problem you identified during the Understand Phase.
  - Do not feel that you have to ask all the questions on the list nor do you need to follow a particular sequence. We have provided a lot of questions to help you get a sense for potential opportunities for inquiry.
- When you are interviewing, be sure to take notes on what you hear and notice about the participant. Write specific information and exact quotations.
- After you have completed your interviews, set aside time to headline (make short summaries of the highlights) your notes.
  - Take square post-its and capture your main takeaway points and any surprises or contradictions, one on each post-it. Stick each post-it you write on the page you were reviewing. Feel free to have more than one post-it on each page.
  - Also, use the Interview Reflection tool provided in this guidebook to reflect on your interviews.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 122.

Remember to review your stakeholder map from the ***Understand Phase*** *to identify who to interview.*

Remember to invite stakeholders to share their perspectives. They are not required to share what they don't want to.

2. SELECTING STAKEHOLDERS TO INTERVIEW

- Return to the **Stakeholder Mapping** tool in the **Understand Phase** to review the stakeholders you identified. Use this tool to select at least three stakeholders to interview who are most relevant to the problem you are exploring.
- Discuss as a team in order to select specific people who represent a variety of stakeholders. Pick at least two people to interview who are often underrepresented. Also think about people who represent positive changes already happening.
- Remember that the people you interview may be nervous about opening up to you. Do your best to be an active listener (focused on their thoughts, nodding, asking follow-up questions, refraining from offering your own thoughts). **Assure the people you are interviewing that you will maintain their privacy. Be careful to not ask sensitive questions that could put the person you are interviewing in a difficult or dangerous position during or after the interview is complete.**
- Do everything you can to reduce the power differential. Be warm and casual and try not to be intimidating. Encourage them by demonstrating that you are genuinely interested in learning from them.
- Think about people to interview who are open and comfortable sharing their thoughts and feelings. Select users who have specific roles - these users (community leader, someone facing a crisis, etc.) often have behaviours and feelings that are more defined. This means they can better articulate their point of view.
- Designers have found that even though these people have a unique perspective, if we design for their needs, we often create solutions that are broadly appealing.

Write the names of the specific people you want to interview below:

Interview #1
Name:

Interview #2
Name:

Interview #3
Name:

Interview #4
Name:

Interview #5
Name:

Interview #6
Name:

Interview #7
Name:

Interview #8
Name:

60 minutes

ENGAGE CONTINUED

3. TIPS FOR INTERVIEWING

- These interviews are not the same as focus groups. You want to connect with a stakeholder one-on-one so that you can really focus on hearing their perspective and following up on their stories.
- You can't reliably ask a person, "What do you need?" Designers have found that is a difficult question to answer. Instead, we like to learn about a stakeholder's life experiences through stories from their lives. By sharing stories, designers have found that stakeholders are more likely to share their emotions and motivations.
- Every interview has an arc -- a beginning, middle and end. Start by introducing yourself and your project.
- Ask a few easy questions, e.g. "Tell me a little about yourself. What do you love to do in your free time?"
- Ask open-ended questions that elicit stories, e.g. "Tell me about your favorite day of the week."
- Don't offer answers to your own questions.
- Follow up on interesting things that you hear or observe. Look for body language cues, listen for pauses, nervous laughter, etc.
- Talk about feelings, e.g. "Tell me more about how that felt. What did you mean when you said that?"
- Look for the deeper "why." Dig deep to really understand what motivates your stakeholder while being sensitive to their emotional boundaries.
  A good way to ask "why" is to say, "Tell me more about..."
- Don't be afraid of silence. Often the person will fill the silence with a deeper thought.
- This process may be uncomfortable but it is critical to the success of the project that you discover new insights about your stakeholder. Do everything you can to make them comfortable and willing to open up and share.
- If you can, interview with a partner so that one person can focus on connecting with the interviewee and one person can focus on capturing quotations and notes.

Meet in a location that is comfortable for the stakeholders. If possible, do the interview in a place relevant to the design challenge.

Remember to spend most of the interview listening to the stakeholders. Be an active listener and do not share your own perspectives.

4. TIPS FOR INTERVIEWING ONLINE

- While it is generally preferable to connect with people in person, sometimes it is not possible. When you are planning to connect with your stakeholders on the phone or through a video conference, please take these added steps to ensure a high quality interview.
  - Make a plan ahead of time for what tools you are going to use - How will you connect with the stakeholder? How will you take notes?
  - Set a time and send information about how you are going to connect in advance (video conference link, etc.).
  - Have a back-up plan in case there are technical issues - share your phone number in case the internet is not working.
  - If you would like to record the conversation, be sure to ask permission of the stakeholder in advance.
- Meeting someone for the first time on a video conference or phone call can feel awkward or disconnected. It is especially important in these contexts to build rapport with your stakeholder. Be warm and welcoming. Express gratitude for their participation. (These tips also work great for in-person interviews!)
  - Try to pay careful attention to the stakeholder's body language and facial expressions. This is harder on a video conference, but if you are paying close attention you can still learn from the stakeholder how they are feeling.

Test the technology in advance to make sure you understand how it works.

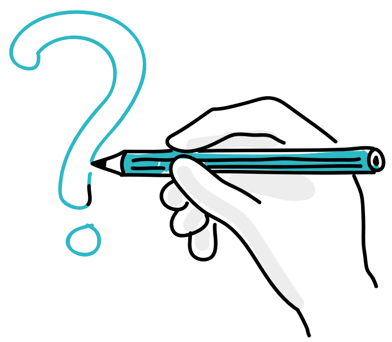
Make an extra effort to focus and connect with the stakeholders virtually. Do not do other activities during the interview.

30 minutes

ENGAGE

ADDITIONAL INTERVIEW STRATEGIES

Instructions: Sometimes a person you are interviewing is struggling to communicate or isn't able to express their ideas. These people may be shy or very young. Use these techniques to engage stakeholders in different ways to help them open up.



USE PLAY OR DRAWING

- Ask the person to show you their favorite and least favorite things about a situation, either through playing with toys or drawing pictures.
- Ask them, "Tell me more about why you did that...
- Tell me about what this means..."
- Be sure to take notes and write down specific quotations that you hear.

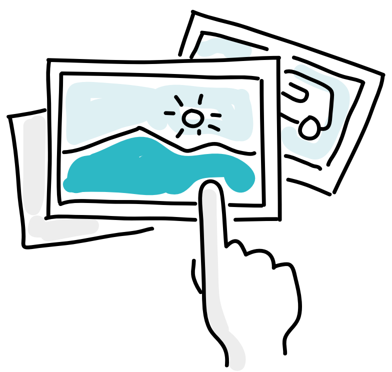
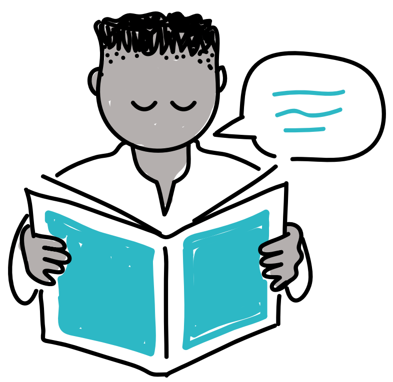


IMAGE SORT/PRIORITISATION ACTIVITY

- Print out ten to twelve pictures of items or places that are relevant to the stakeholder. The pictures can be generic - they do not need to be of your community, etc.
- Ask the person to pick out images that remind them of how they feel. These images do not need to be directly relevant - they are meant to prompt the person's creative and emotional reflection.
- Ask them, "Why did you choose this image? How does this remind you of our community?"
- This same activity can be completed by printing out cards with different items or aspects of a problem (budget items, for example). Then ask the stakeholder to put them in priority order.
- Be sure to take notes and write down specific quotations that you hear while the person is completing the exercise.
- Ask follow-up questions about interesting things you noticed.



READ A STORY

- Read a story or look at a picture book together.
- Ask them, "What do you like about this? Why?"
  "What do you dislike about this? Why?"
  "How does this remind you of your situation?"
- Be sure to take notes and write down specific quotations that you hear.

Additional interviewing techniques can help stakeholders open up and take the conversation in unexpected directions.

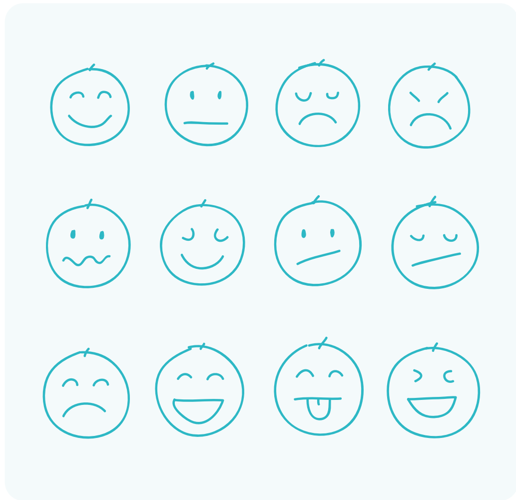
Remember that it can be hard for stakeholders to express their opinions. Use creative ways to help them articulate their thoughts.

TAKE A TOUR

- Ask the stakeholder to show you their favorite and least favorite things about their situation.
- Ask them, "Tell me more about why you brought me here... What do you like about this? Why?"
- "What do you dislike about this? Why?"
- Be sure to take notes and write down specific quotations that you hear.

ASK THE PERSON TO INTERVIEW A FRIEND

- Ask the person to find a friend to interview. Tell them you want to learn more about their experience and you want to see it through their eyes.
- Observe and listen as the person interviews their friend.
- Afterwards, debrief with the interviewer. Ask them, "Tell me more about why you asked that question... What did you think of their answer?"
  "Do you relate to that? Why or why not?"
- Be sure to take notes and write down specific quotations that you hear.



ASK PEOPLE TO CHOOSE FACES THAT REPRESENT THEIR FEELINGS

- Give the person a sheet with different faces on it - see below as an example.
- Ask them, "Point to the face that represents how you feel about a certain experience. Tell me more about why you choose that face."
- You can also ask, "Tell me about your best day. Pick the face that represents that day. Tell me about why you choose that face."
- You can also ask, "Tell me about your worst day. Pick the face that represents that day. Tell me about why you choose that face."Let the person interpret what each face means to them and explain to you what they are thinking.
- Be sure to take notes and write down specific quotations that you hear.

60 minutes

ENGAGE

BRAINSTORM INTERVIEW QUESTIONS

Instructions: Before you interview a stakeholder, brainstorm interview questions that you might want to ask based on what you need to learn for your design project. You will not use all of these questions, but it is helpful to generate more than you might ask in order to ensure that you have thought of all the most important questions. When it comes time to interview, use the interview questions provided to get the conversation started with different stakeholder groups. Feel free to modify questions to be culturally appropriate and relevant to your context.

STAKEHOLDER GROUP: ______________________________

- ○ Tell me about your life. Where do you live? Tell me about your community.
- ○ What do you do for work?
- ○ Tell me about something that makes you happy. Tell me about something that makes you proud.
- ○
- ○
- ○
- ○
- ○
- ○
- ○
- ○
- ○

Is there anything else you would like to share?

STAKEHOLDER GROUP: ______________________________

- ○ Tell me about your life. Where do you live? Tell me about your community.
- ○ What do you do for work?
- ○ Tell me about something that makes you happy. Tell me about something that makes you proud.
- ○
- ○
- ○
- ○
- ○
- ○
- ○
- ○
- ○

Is there anything else you would like to share?

For more guidance for this tool as well as an example, refer to the **Resource Book** on pages 123 and 124.

Preparing interview questions in advance can help you ask questions that are open-ended.

Brainstorming more interview questions than you need will help you generate more relevant and interesting questions.

ENGAGE

INTERVIEW QUESTIONS & STRATEGIES

Instructions: Use this tool to prepare to conduct your interviews and to take notes during your interviews. Use the interview questions provided to get the conversation started with different stakeholder groups. Follow up on interesting things you hear. You can ask, "Tell me more about..." Be sure to keep notes about the specific stories and quotations you hear from your interviews.
Use post-its to capture the most interesting things you hear and observe. Listen and look for emotions and motivations. Also, listen for ideas that are surprising to you, as well as contradictory information. The more notes you take, the better your ideas will be later in the design challenge. Please feel free to print more of these pages as needed.

INTERVIEW QUESTIONS

Choose the questions that you generated earlier that are most relevant to the problem you are exploring. Rewrite them here. Feel free to modify questions to be culturally appropriate.

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

At the end of the interview, always ask this final question: Is there anything more you would like to share with me?

ADDITIONAL INTERVIEW STRATEGIES

If you are using additional interview techniques, write them here.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 125.

Select the most relevant questions to ask - you can always reference the additional questions later in the interview.

Selecting and rewriting your interview questions will help you iterate and refine your priority questions.

60 minutes, per interview

ENGAGE

INTERVIEW NOTES

Instructions: Use this tool to take notes during your interviews. Be sure to keep notes about the specific stories and quotations you hear from your interviews. Listen and look for emotions and motivations. Also, listen for ideas that are surprising to you, as well as contradictory information. The more notes you take the better your ideas will be later in the design project. Follow up on interesting things you hear. You can ask, "Tell me more about...'

INTERVIEW

Who did you interview?

WHAT DID YOU HEAR?

Write down specific quotations. Listen for stories, emotions, motivations and behaviours. Listen for surprising or contradictory information. Look for emotions (sadness, excitement, joy) in the person's body language and facial expressions.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 127.

Be sure to capture photos and quotations from your interviews

Record exactly what you learned from your stakeholder without interpreting what you heard

ENGAGE

REFLECTING & ITERATING AFTER AN INTERVIEW

Instructions: After each interview (but especially after your first interview) take some time to reflect on what questions yielded interesting answers and engagement from the stakeholder and what questions did not. Make changes to your questions in order to improve them. Try new questions in the next interview.

It is important to practice iterative design research. As you interview different stakeholders, you will learn which questions are successful and which are not. You may also discover new questions you want to add to the list. You can always revisit interview questions after initial interviews to make additions and improvements.

Rewrite some of the questions you generated using the tool above. Write new questions as well.

1.

2.

3.

4.

5.

6.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 128.

Be sure to identify the most successful interview questions and preserve those!

Interviewing should be an iterative process - be sure to reflect and make changes as you go

IMMERSE

A DAY IN THE LIFE: PREPARING TO SHADOW

Instructions: As a part of the process of exploring this problem, you have the opportunity to participate in an immersive observation experience with a stakeholder you are working to serve. When you immerse in another context, you can gain inspiration and insight by engaging in the same experiences as your stakeholder. During the experience, be sure to take notes so that you can reflect on what you learned in order to move into the next phase of the process.

1. PREPARING TO SHADOW

A key component of the **Human-Centred Design** process is developing a deep understanding of the needs and motivations of the people closest to the problem you are working to solve. For this exercise, you will immerse yourself in the experience of a person you are working to serve to help you gather inspiration and insights about the context.

Here's what you need to do:

Spend a full day shadowing a person. Ideally you would start from the beginning of the day. While it might be difficult to organise observing them at home (and it is okay if it doesn't work), it is important to understand how the person's full life is affected by their experiences during the day. You will end the shadowing experience at the end of the day.

Your goal:

Your goal is to experience the person's day: what it feels like, when you feel good and when you do not, when you are stressed, what transitions are like, etc. The point of this exercise is to help you understand what it feels like to be the person you are designing for in this project. It is okay if the person's experience is altered a bit because you are shadowing. Focus on how you personally feel. Approach the day with a curious, open mind. Your job during your immersion day is not to evaluate or judge what you see and experience.
Rather, your goal is to let go of your own agenda and your own assumptions about the person's experience and immerse yourself in what it is really like to be that person.You are not trying to solve problems or intervene today. Your goal is to fully observe and participate. We have provided tools to help you take notes. Try to make specific observations and avoid generalisations.

By observing with empathy, you will increase your chances of discovering opportunities for solutions that respond to the needs of your stakeholders.

2. TIPS FOR SHADOWING

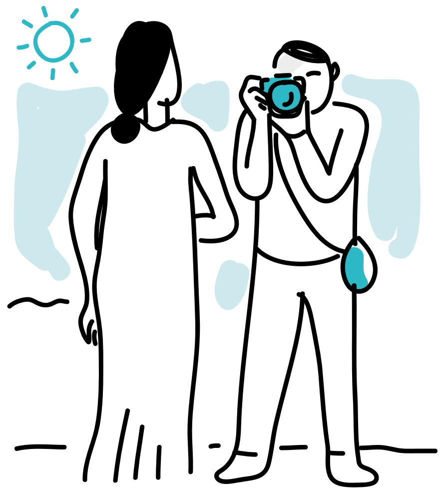
Try to blend in and allow the person's day to naturally unfold. It will be different because of your presence, of course, but work hard to not influence the experience too much. Match the attire of the person you are shadowing.

Really try to experience what the person experiences. For example, if you are shadowing a student to understand her experiences at school, this means wandering the halls during break, eating lunch in the cafeteria, going to every class, etc. This also means no talking to colleagues or adults, not going to the break room, not doing things that only adults in the building are allowed to do.

Take lots of notes. Capture detailed descriptions of everything you experience. Take pictures of interesting events, experiences, etc. These pictures will help you remember key moments or interesting tensions.

Work as a team to identify the most relevant experience and stakeholder to shadow.

When you participate in a shadow activity, do everything you can to immerse yourself - wear appropriate clothes, fully participate in activities, etc.



3. PLANNING FOR YOUR SHADOW

- Think about the stakeholder groups that you would like to shadow.
- Find a representative of the stakeholder group, whose voice is underrepresented, and ask them if they are willing to have you shadow them for a day.
- Clear your schedule for the day. Find people to fill in for your regular duties.
- Meet the person at the beginning of the day.
- Spend a little time getting to know the person and breaking the ice.
- Take pictures, but only if the person is comfortable and agrees with you taking pictures.
- Take notes to capture your observations of different parts of the person's day.
- At the end of the day, complete the **A Day in the Life: Note & Journey Map** reflection tools. Use these tools to help you identify what inspiration and insights you gained.

4. SHADOWING REMOTELY

Shadowing is best done in person, side-by-side with the stakeholder. If that is not possible, here are some creative alternatives to consider:

- Ask permission to log in with the stakeholder in their online spaces (school, work, gaming, etc.).
- Ask the stakeholder to take video or photographs of their experiences throughout the day. Then ask the stakeholder to walk you through the photos or talk about the video to explain the experiences they were having. Use a Journey Map to help you take notes.
- Ask the stakeholder to complete their own Journey Map through the course of a day to help them reflect and capture how they are feeling.

Shadowing remotely can be difficult but there are still opportunities to learn from your stakeholders' experiences if shadowing in person is not possible.

Remember that you are not evaluating or judging this experience. Come to the experience with no judgment and a beginner's mindset.

60 minutes

A DAY IN THE LIFE: NOTES

Instructions: Review the notes you captured from your shadow experience. Use this tool to begin the process of synthesising what you heard and observed.

1. DESCRIBE WHO YOU SHADOWED.

Who did you shadow? Age, gender, role, likes, dislikes, strengths, weaknesses.

2. WHAT DID YOU SEE?

3. WHAT DID YOU HEAR?

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 129.

Be sure to set aside some time to reflect after your shadow experience.

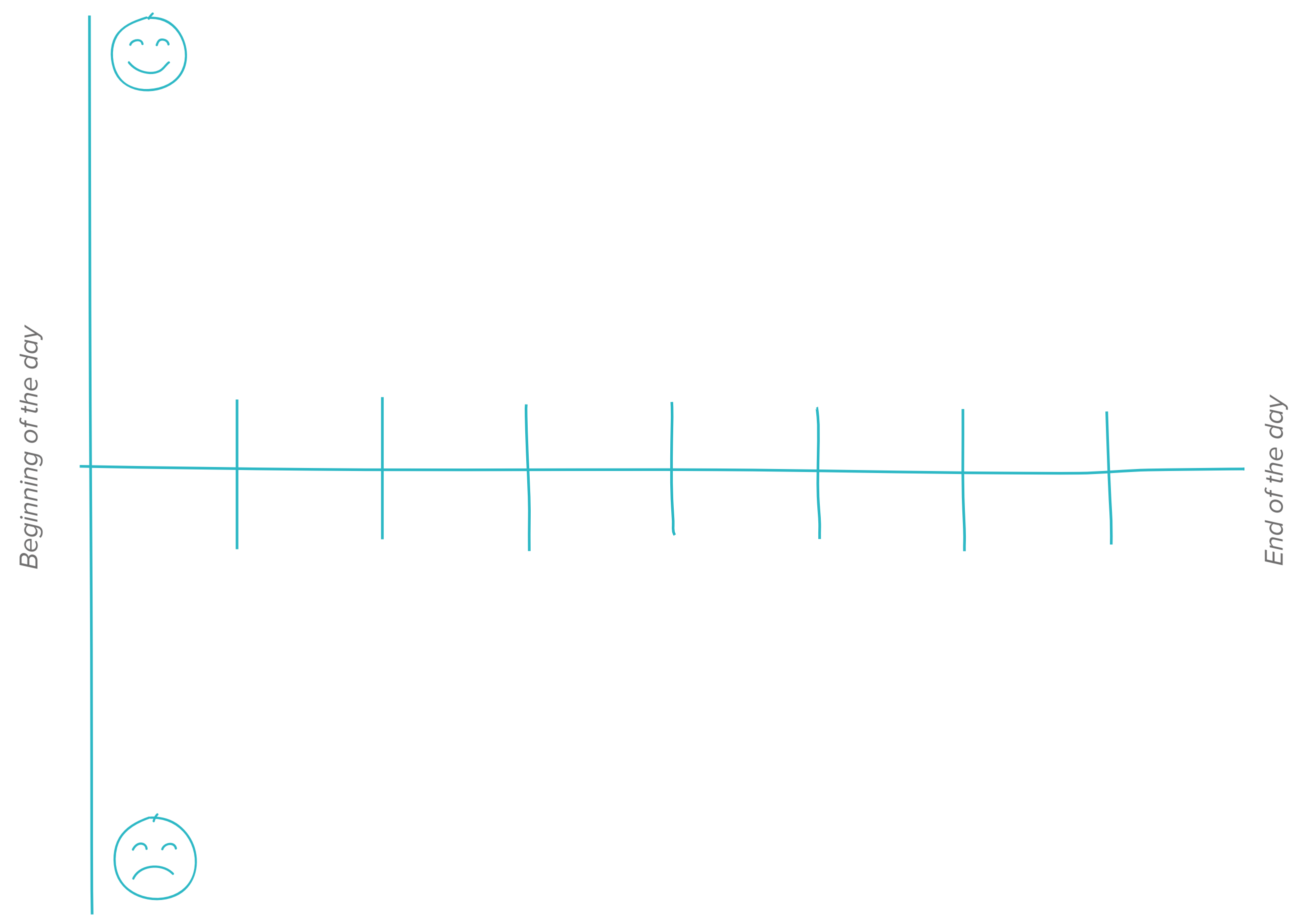
Remember not to judge or interpret - just record what you experienced.

60 minutes

A DAY IN THE LIFE: JOURNEY MAP

Instructions: Journey maps are a method of design that can help you gain more insight into a stakeholder's experience. Use the framework to map how you felt during your shadow experience. Start the beginning of the day and finish the journey map at the end of the day.

NOTE: This tool can also be used as an interview prompt or a tool to help a stakeholder capture their own experiences throughout their day.



Take note of anything that you notice as you shadow. This might include potential areas of opportunity or questions about which you might want to learn more.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 130.

A journey map is a helpful tool for capturing feelings across the timeline of an experience.

Reflect on how you felt during different parts of the day and use the journey map to record those feelings.

60 minutes to prepare, 2-3 hours to observe

OBSERVE

OBSERVATION

Instructions: Observe the experiences of the stakeholders for whom you are designing. Find a location that is relevant to your design challenge. Your goal is to understand what it is like to be a stakeholder in that environment.

1. PREPARING TO OBSERVE

Your goal for this exercise is to understand the experience of the stakeholders: how it feels (fun, interesting, confusing, frustrating), what are pleasurable aspects of the experience, what are stressors, what are specific touch points, transitions, decisions, etc.

Approach your observation with a curious, open mind. Your role as an observer is not to evaluate or judge what you see and experience. Rather, your goal is to let go of your own agenda and your own assumptions about the "problems" and look closely at what this experience is really like for your users. Try to make specific observations and avoid generalisations.

You are not trying to solve problems or intervene today. Your goal is to fully observe and participate. Tools to help you take notes are provided.

Try to make specific observations and avoid generalisations. By observing with empathy, you will increase your chances of discovering opportunities for solutions that respond to the needs of your stakeholders.

2. TIPS FOR OBSERVATION

- Generate questions that you want to learn more about by observing the experience.
- Plan a time to go and observe the context and stakeholders. Be sure that during the time you choose, there will be typical activity happening in the environment.
- Sit back and take notes. The observation is not for interviewing people. Your goal is to see beyond the obvious and gain new understanding through close looking.
- Observe and record behaviour within that context, without interfering with people's activities. Look for emotions, interactions, pain points and challenges.
- Spend time after your observations reflecting on what you noticed and learned.

Remember that when you are observing you are not engaging with the environment.

Try to come to your observation with an open mind - you are not there to judge or evaluate.

60 minutes

OBSERVATION NOTES

Instructions: Review the notes you captured during your observation. Use this tool to reflect on what you heard and observed.

1. WHERE DID YOU OBSERVE?

What time was it? What did you notice about the environment?

2. WHAT DID YOU SEE STAKEHOLDERS DOING?

3. HOW ARE PEOPLE INTERACTING WITH EACH OTHER?

4. WHAT DID YOU HEAR STAKEHOLDERS SAYING?

5. WHAT OBJECTS ARE PEOPLE INTERACTING WITH?

For example: buildings, furniture, cell phones, vehicles, etc.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 131.

Be sure to set aside some time to reflect after your observation experience.

Remember not to judge or interpret - just record what you experienced.

60-120 minutes

PERSONA FOR REAL

Instructions: Review the notes you captured during your interviews, shadow experience and observation. Use this tool to gather information and stories about one person you met and the details of their life. Develop a persona based on the data you collected. A persona is an opportunity to tell the story of one person in a more detailed way. This persona will inspire your design team further into your design project.

PHOTO

NAME:

GENDER IDENTITY:

AGE:

RACIAL/ETHNIC IDENTITY:

EDUCATION LEVEL:

CURRENT CITY:

OCCUPATION:

HOMETOWN:

Describe how this person is connected to your problem space.

Supporting Quotations:

Describe this person's goals and aspirations related to your problem space.

Supporting Quotations:

Describe the barriers and challenges this person is facing in trying to meet their goals and aspirations.

Supporting Quotations:

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 132.

Use the tool to describe who you met and some of the most important and relevant details of their lives.

Use quotations from your interviews or notes from your immersion experience to support your reflections.

60-120 minutes

WHAT DID YOU LEARN?

Instructions: Review the notes you captured during your interviews, shadow experience and observation. Identify the most important things you learned during these process steps using the different criteria below. Be sure to keep the post-it notes color-coded by stakeholder. If you run out of room on this page, be sure to keep your color-coded post-its along with these notes.

1. **WHAT ARE THE FIVE MOST IMPORTANT THINGS YOU LEARNED FROM EACH CATEGORY BELOW THAT ARE RELEVANT TO THE PROBLEM YOU ARE EXPLORING?**

MOST IMPORTANT TO STAKEHOLDER

MOST RELEVANT TO THE DESIGN CHALLENGE

MOST POSITIVE EXPERIENCES FOR THE STAKEHOLDER

MOST CHALLENGING EXPERIENCES FOR THE STAKEHOLDER

MOST UNEXPECTED

For more guidance for this tool as well as an example, refer to the **Resource Book** on pages 134 and 135.

As you prepare to transition to the next phase, use the criteria to identify the most important things you learned during this phase.

Use this opportunity to begin to prioritise what you learned from stakeholders.

EMPATHISE DIGITAL TEMPLATES

EMPATHISE: DIGITAL TEMPLATES

#1

EMPATHISE PHASE SLIDE DECK TEMPLATE

Use this slide deck template to create presentations throughout your design project.

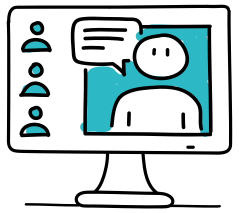
Scan this QR Code or click here to access a Challenge Brief slide deck template.

#2

EMPATHIZE PHASE MURAL TEMPLATE

Use this Mural template to complete your team's **Empathise Phase**.

Scan this QR Code or click here to access a template in Mural, an online collaborative platform.



All of the **tools and resources** have **digital versions** that will allow your design team to capture your work, share it with others and collaborate while working remotely. Scan the **QR codes** below to access these resources.

#3

DESIGN WORK JOURNAL PDF

Use this PDF of the **Design Work Journal** to capture the most important information from each phase of the design process, as wellas reflect on and improve the qualityof your design work. Your design team will use the same Design Work Journal throughout your project.

Scan this QR Code or click here to access a PDF of the Design Work Journal.

#4

DESIGN WORK JOURNAL MURAL TEMPLATE

Use this Mural template of the **Design Work Journal** to capture the most important information from each phase of the design process, as well as reflect on and improve the quality of your design work. Your design team will use the same Design Work Journal throughout your project.

Scan this QR Code or click here to access a template in Mural, an online collaborative platform.

EMPATHISE: CHECKLIST

Congratulations on completing the Empathise Phase of your design challenge.

At the end of this step, your design team should feel aligned around the experiences, motivations and behaviors of key stakeholders. Your design team should feel that you have an adequate sample of qualitative data from your design research process.

At the end of every phase of the design process, use the checklist provided to make sure you are making progress and are ready to move forward.

BY NOW, YOU SHOULD HAVE COMPLETED THE FOLLOWING:

- [ ] Complete the tools of the **Empathise Phase** that were listed in your design pathway; depending on your design pathway, you may skip this phase.
- [ ] **Document your work** in your **Design Work Journal** through pictures and reflections on what you learned
- [ ] Complete the **Team Alignment** exercises in your **Design Work Journal**
- [ ] Complete the **Equity Reflection** exercise in your Design Work Journal
- [ ] Complete the **Process Reflection** exercise in your **Design Work Journal**
- [ ] Use the **Process Critique** tools in the **Design Work Journal** to reflect on the quality of your design work

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03
EMPATHISE

Developed by:
Accelerate Impact