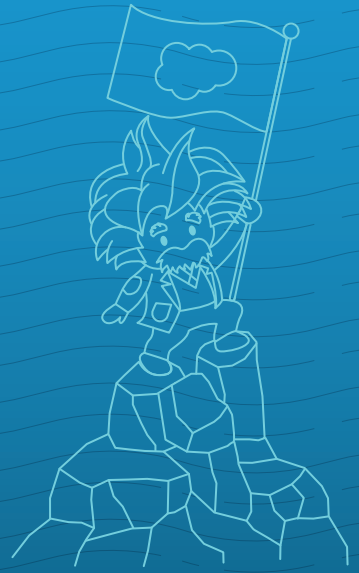
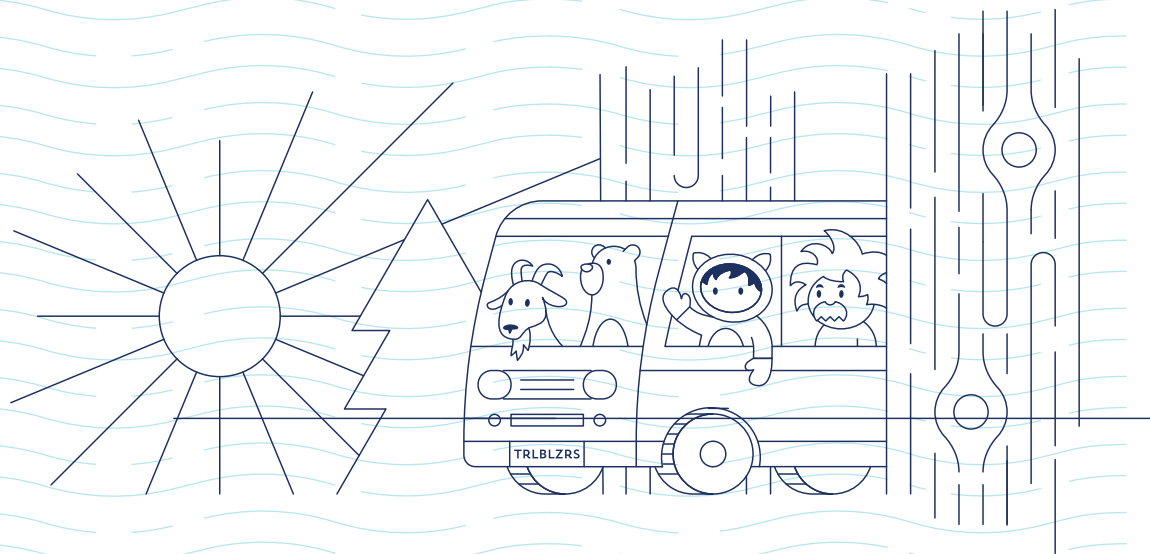




# Design *Thinking* Playbook







# *What is* **Analytics Design Thinking Workshop?**

The workshop is a user-centered and iterative process to arrive at solutions that drive tangible value for users. We are going to focus on three phases to bring concepts and ideas to a form that relevant stakeholders can discuss prioritize and then implement:

**Empathy**  
**Ideation**  
**Design & Test**



## **In this Book:**

# Empathy

Persona Development

Path of Inquiry

# Ideation

Crazy 8s

Screen Sketching

# Design & Test

Prototyping

Testing

# Implement

Design Systems

Resources



**No Laptops**  
**No Phones**  
**Open Mind**  
**Be Creative!**

## *Before you start:*



**Time:**

~90 min



**Place:**

A room big enough with white boards and/or big empty wall



**People:**

1-2 facilitators, 6-12 participants



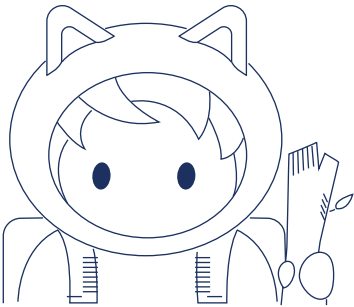
**Roles:**

Stakeholders, developers, potential users

**Let's do it!**

# Know your User!

The first and most important step is to understand who you're designing for. Ensuring your understanding of your user's needs, contexts, and history will help ensure that you start your design process by asking the right questions.



**Name:** Astro

**Role:** Trailblazer

**Experience:** 10+ years

*“As a Trailblazer, I want to transform and innovate the business, so that I can empower people to blaze their trails”*

## **Motivators:**

Celebrate customer success

## **Goals:**

To inspire and enable people to change the trajectory of their lives and their business

## **Behaviors:**

Always learning and growing

## **Expectations:**

Always be leading the way to get ahead of competitors

## **Frustrations:**

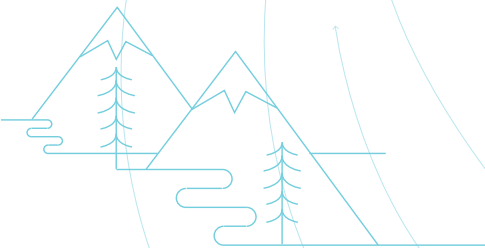
Following trends, and watching others innovate and lead the way forward

# Persona Development

Suggested Time: 20 minutes

Materials Needed: Whiteboard and Markers

- 1** As a group, begin by aligning on the role, years of experience, and name for your persona.
- 2** List all of the frustrations the persona has with the current experience.
- 3** Discuss and list the motivating factors the persona has for using the experience.  
List all of the persona's expectations for the experience.
- 4** Summarize in a simple paragraph starting with: As a [*persona's role*], I want to [*expectations*], so that I can [*business goal*].





# Think like your User!

The path of inquiry allows you to anticipate the critical business questions the user needs to answer to achieve their business goal. The path of inquiry sets the foundation for the experience information architecture.

## Who is your user?

Astro

## What is your user's most important business goal ?

Inspire people to transform their business

## What questions need to be answered to reach that goal?

What are the top areas for innovation?

## What data does your user need to answer those questions?

Customer innovation over time



# Path of Inquiry

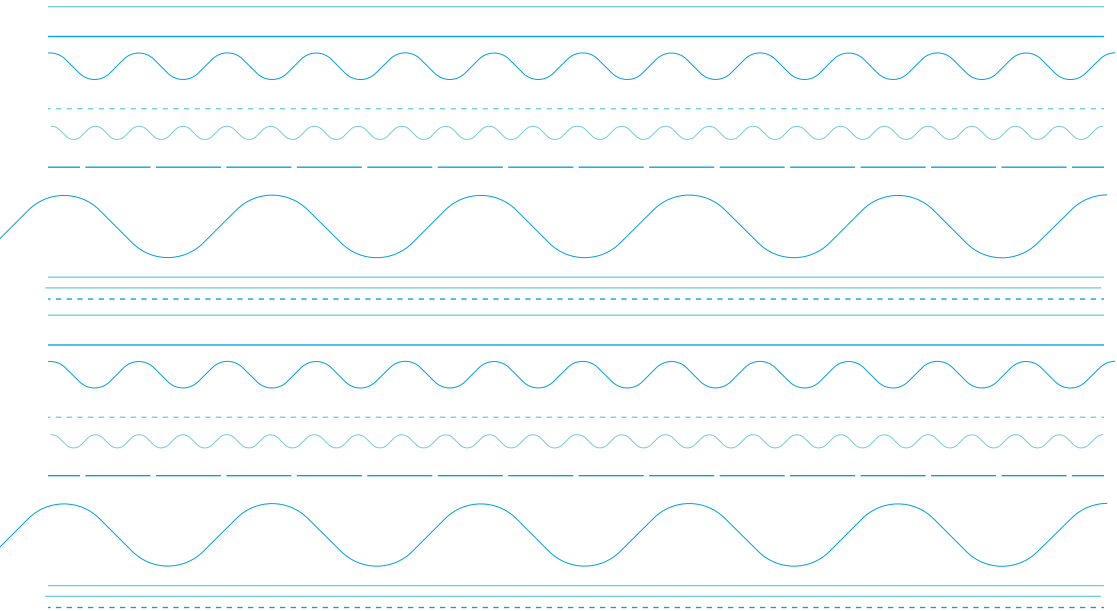
Suggested Time: 30 minutes

Materials Needed: Post-Its, Sharpies, Dot Stickers

- 1** Individually, imagine the questions that your persona may want to ask throughout their day, quarter, year...write each question down on one post-it
- 2** As a group, read out your questions to each other. If two are the same or very similar, combine them.
- 3** As a group, rapidly sort questions into themes by physically grouping the post-its and labeling the groups.
- 4** Prioritize the questions using Dot Voting, each person gets budget of 5 stickers. They use the stickers to vote for the questions that most strongly tie to the user's goal.

# Get creative!

The “five line polaroid” activity breaks the ice and energizes the room to tackle the second part of the workshop that centers around ideating as a group by sketching ideas. This activity proves that you don't have to be an artist to convey an idea. The rich conversation inspired and enhanced by the quick framing of a sketch is what matters.



# Five Line Polaroid

Suggested Time: 2 minutes

Materials Needed: Paper, Sharpies

- 1 Individually, picture a happy memory from your life.
- 2 Draw a simple representation of that memory using only 5 lines of any length, but they can't cross.
- 3 Take turns describing your "photo" in as much detail as you can to each other.

**Anyone can  
draw lines!**

# Let's visualize our ideas!

Crazy 8s challenges you to sketch 8 distinct ideas in 8 minutes. The goal is to generate as many ideas as possible in as little time as possible. Try to base your ideas on the questions from the path of inquiry that received the most votes.

*How many ideas can  
you generate?*



# Crazy 8s

Suggested Time: 8 minutes

Materials Needed: Paper, Tape, Sharpies, Dot Stickers

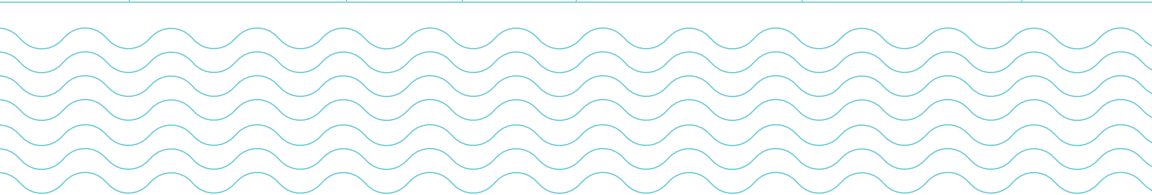
- 1** Individually, fold a plain white piece of paper in half three times, then unfold to create 8 equal boxes.
- 2** Give 8 minutes to sketch an idea in each section of a paper based on the highest voted questions from the Path of Inquiry.
- 3** Once time is up, as a group, put all sketches up on the wall. Each participant briefly explains their sketches. Limit presentation to no more than 2 minutes per person.
- 4** Now it's time to prioritize the ideas using Dot Voting, each person gets a budget of 5 stickers. They use the stickers to vote for the sketches that most strongly relate to the user's goal.

Inspired by the first round of drawing, use several pieces of paper to draw a more complete solution for your persona (mobile or desktop screens)

**What is the first screen they see?**

**Which device should we design for?**

**What action do they take?**



# Key Screen Sketching

Suggested Time: 20 minutes

Materials Needed: Paper, Tape, Sharpies, Dot Stickers

- 1** As a starting point, think back to the top questions and ideas from the path of inquiry and crazy 8's.
- 2** Decide on a layout to use for your page (F or Z pattern).
- 3** Start by sketching your key headline for the page followed by the supporting visualizations and details.
- 4** Share your sketch with the other participants (no more than 3 minutes).
- 5** Prioritize the ideas using Dot Voting, each person gets a budget of 5 stickers. They use the stickers to vote for the sketches that most strongly relate to the user's goal.



# TEST!

*Gathering feedback from real users performing realistic tasks validates needs and designs. It also surfaces opportunities for improvement.*

# Test your Designs

Suggested Time: 30 minutes

Materials: key screen sketch, wireframe or prototype

Participants: you and the user

- 1 Schedule time with an actual user.
- 2 Ask the user to perform tasks using your design.
- 3 Don't offer any help just ask the user where things are expected.
- 4 Consider changing the design when the user is unable to complete a task or when feedback indicates a critical problem.



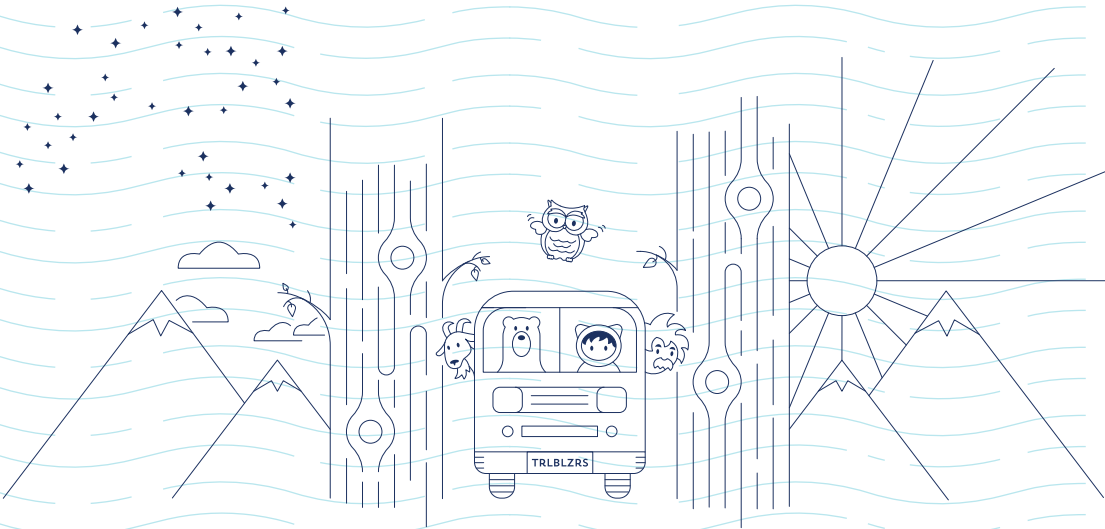
Resources:



Learn Analytics Best Practices



Explore Analytics Trails





Einstein Analytics