The Design Sprint at nearForm

A handbook on design sprints and how to run them.

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At nearForm our core value is that 'we deliver'. We help you and your business deliver software in every shape and size. As part of this, we are always investigating methodologies, such as **GV** [1] **Design Sprint** to deliver better quality software more efficiently.

This handbook guides you through how we run design sprints at nearForm. The activities and methods in this sprint are fundamentally defined and designed to help facilitate shared understanding between a group of people, and thus help in building better software. Each activity has a suggested time duration indicated on the top right corner of each page.

Over the course of the 5 days, the team, which is a mixture of customer members and nearForm facilitators; clearly defines the problem and then comes up with customer oriented, but user-centered solutions.

Finally, a design sprint also gives us the opportunity to get a clear understanding of business goals, unearth technical opportunities, and identify user needs.

> Every project is different.
> We tailor the engagement's duration to fit your goals.
> Your success is our only goal!

[1] Google® Venture

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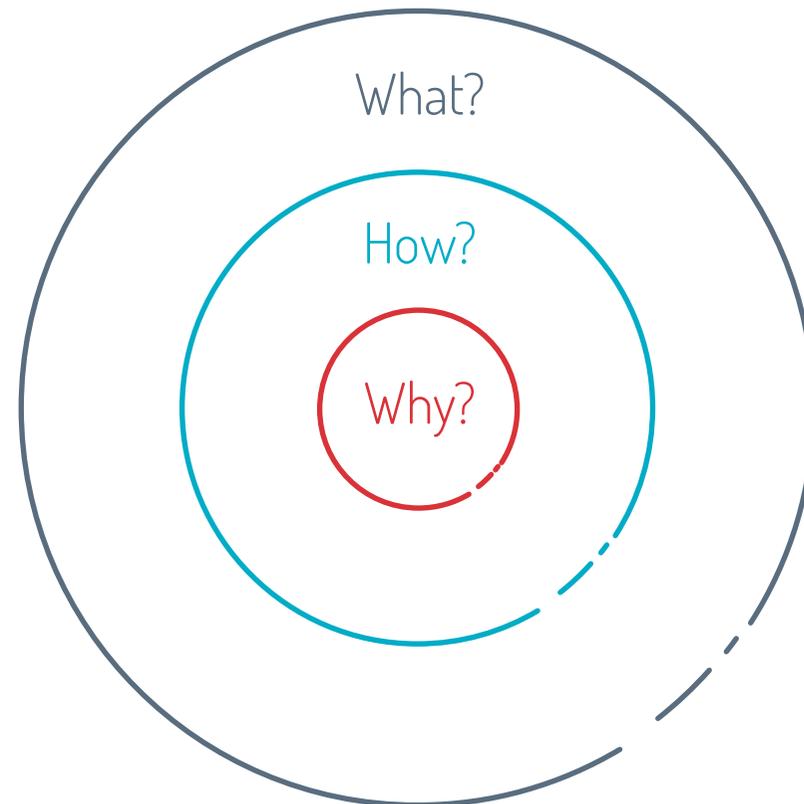
Introduction
What? Why? How?

What is a Design Sprint?

A design sprint is a five-day workshop that we use for answering three critical business questions through design, prototyping, and testing ideas with customers.

1. **What** problem are you trying to solve?
2. **How** do you expect to solve it?
3. **Why** this problem is worth solving?

Point three being the most important of all. Understanding the reason why helps you pitch your business idea; whether it's for investors or new prospects.

Answering these three questions also creates shared clarity and understanding, making a design sprint an excellent way to kick-off a project.

What?

How?

Why?

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The Agenda

Goals	Day 1 Understand	Day 2 Ideate	Day 3 Sketch	Day 4 Prototype	Day 5 Validate
08:45	Introductions	Agenda for the Day	Agenda for the Day	Agenda for the Day	Agenda for the Day
09:00	**Business Opportunity** Discussions Set Product Goals Personas	**Storyboard** Individual Brainstorming Dot Voting	**Decide** Decide on winning sketches	**Prototype** Assign roles Prototyping	**Test** Facilitate Interviews
13:00					
14:00	**Define** User Journey Map Choose a target Technology deep dive Business pitch practice Retrospective	**Storyboard** Individual Storyboarding Contact candidates for Day 5 Business pitch practice Retrospective	**Sketch** Collaborative Sketching Business pitch practice Technical backlog Retrospective	**Prototype** Trial Run Business pitch practice Retrospective	**Analyse** Discuss interviews Sprint wrap up Discuss next engagement
17:30					
Outputs	Problem statement Persona Customer Journey	Business pitch Storyboards List of users for testing	Refined sketches Content for prototype	Prototype Technical Backlog Business pitch	Interview recordings or notes Insights from reviews Decision on follow up actions

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Getting Ready

There are two must-haves that help kick-start the week under the best conditions:

1. Share existing knowledge and material

Examples of this could be user research, a business pitch, analytics data, or competitor analysis. Sharing this before the design sprint begins introduces more common ground and helps with a smoother introduction.

2. Prepare a dedicated space

Book a dedicated, bright, and spacious room for the entire length of the workshop. This is a must so you can pick up each day without having to set up again or have interruptions by moving from A to B. It is also important to stock up on sticky notes, markers and flip charts, as well as having access to a white board in this space.

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Day 1
Understand

Problem statement
Persona
Customer Journey

Discuss

At the start of a design sprint, the team spends time sharing and discussing the challenge at hand. Pooling knowledge and perspectives builds a shared understanding of the problems and challenges faced by the users, the business, and the projects' domain. Setting the stage for the project overall, and the five days in particular.

Discussions may include:
• The project vision, business goals and business strategy.
• Customer insights.
• The existing product experience if any.
• Analytics and usability reports if any.
• Competitors' market.
• Technology considerations and opportunities.
• Logistic and financial insights.
• Marketing insights.
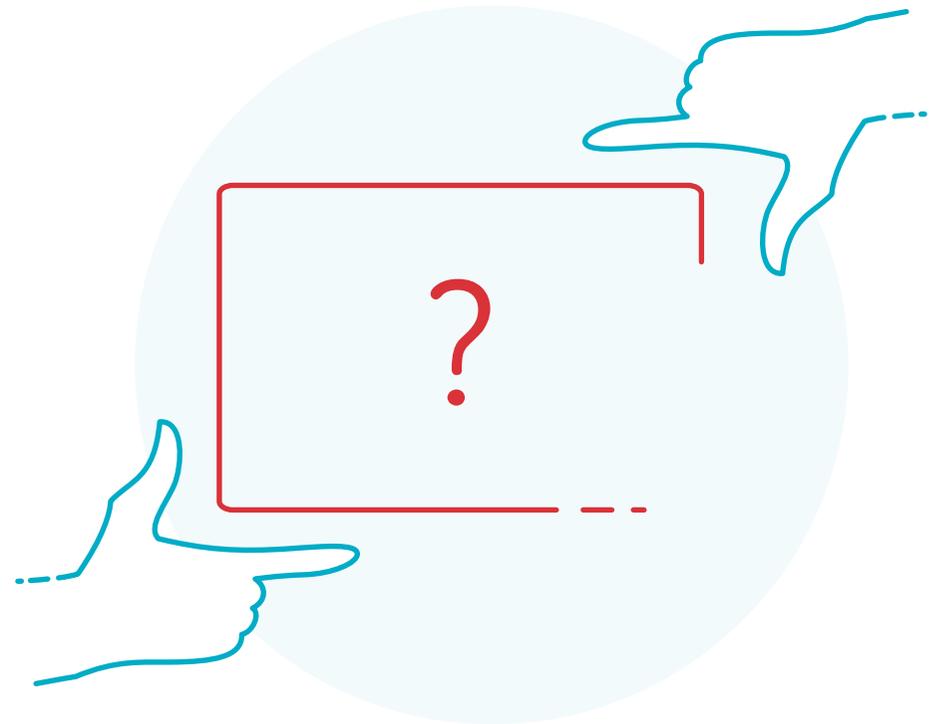
>| Activity Build a shared understanding of the problem space.

Set Product Goals

Setting product goals early in the design sprint helps the team align on a common understanding of the project initiative. Goals should focus on the user needs, and business objectives in the context of technical and financial considerations.

For each goal:
• Decide if it is a short term or a long term goal.
• Specify a type of user.
• Specify a capability.
• Specify a measurable market differentiator.

These goals guide and motivate the team throughout the sprint.

In **3 months** a **developer**,
       [Term]   [User]

can **identify specific issues in a Node JS app,**
                    [Capability]

in **3 days without deep domain expertise.**
       [Measurable market differentiator]

>| Activity Write the product goals on the white board.

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The Personas

While setting the goals, you've identified key user types. It's now time to capture as much information as you can to better understand who will use the product. We do that by creating personas.

A persona is a realistic representation of a person that represents a major user group for a product. Personas help to put a product or feature from the in perspective from the user's point of view.

How to create a User Persona?

1. Divide a large sheet into sections: Description, Activities, Motivations and Frustrations.
2. Give the persona a name and describe their role.
3. Each team member individually writes notes that describe characteristics of the personas (motivation, activities, goals, technical level, etc.)
4. Then each sticky note is put on the sheet, in the related section.
5. The team discusses and fills in any gaps collaboratively.

>| Activity Sketch some Personas.

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User Journey Map

A User Journey Map helps the team collectively understand an end user's current work-flow by breaking down the steps they go through to achieve a given goal. It also helps us describe a better experience by addressing pain points and points of opportunity as part of a new product idea.

How to create a User Journey Map?

• Choose a persona to use as your perspective for the journey map.

• Draw six rows and label each: Phases, Doing, Thinking, Happy moments, Pain points, Opportunities.

• Fill in the phases by placing sticky notes with key experiences relating to that phase for your chosen user.

• Doing this for each phase will give you a step-by-step breakdown of your chosen user group's world.
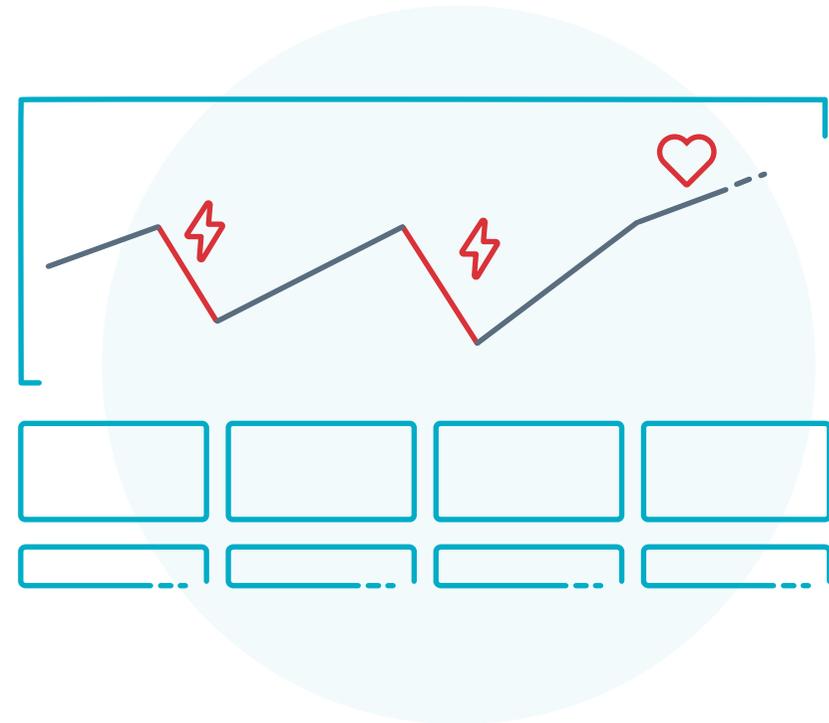
>| Activity Make a User Journey Map on the white-board.

Focus of the Week

With the personas and user journey map done, you now have an overview of what the big picture looks like; you've identified who your users are, and what goes on in his/her world. In many cases, the challenges you've unearthed are plentiful and complex so we use this final step to decide what the focus of the week is going to be.
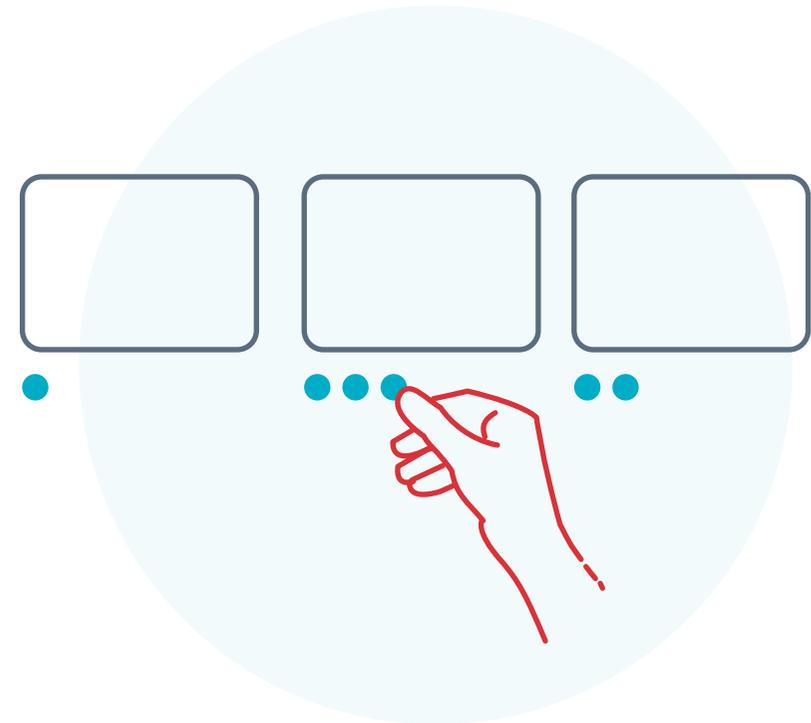
Dot Voting is used to make the decision.

Thing to consider:
• The most important user and the critical moment of that user's experience.
• The biggest risk and opportunity.

How do Dot Voting works?
• Everyone receives a number of dot stickers.
• Review the material.
• Vote in silence for one customer and one event.

>| **Activity** Vote in silence for one persona & event.

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Technology and Data Deep Dive

Depending on your objective for the Design Sprint, an optional part of the week is doing a technology and data deep dive. This part is often a side bar between the technical people in the room. At nearForm, the conversation covers our typical delivery process as well as a project's specific needs.

Things to be discussed in this sidebar are:
• Security concerns.
• Data privacy concerns.
• Data discussions: What is it? Where does it come from? How is it processed? How is it stored?
• High level architecture.

As a result of this discussion, and as the project is shaped during the week, the team can get a full understanding of the business and technical challenges it faces for this product. A logical next step would be to create a backlog of features with a rough time estimate.

>| Activity Write technology related details.

Day 2
Ideate

Business pitch
Storyboards
List of users for testing

Individual Brainstorming

After the first day, you should have your goals set for the Week and a strong idea of the challenge. With this in mind, the team is now asked to rapidly brainstorm big ideas.

Sketching is the most effective way to communicate abstract ideas. You do not need to be an artist to do this! You are mostly drawing boxes and stick figures. Ideas are more important than drawing skills!

How to brainstorm ideas?
• On one sticky note write a brief overview of an idea or solution for a persona/pain point pair.
• On a second sticky note draw a sketch that describes the solution. Sketches can be an interface or a user performing an action.
• Create as many as you can in the allotted time.

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Dot Voting

Dot Voting helps the team decide which ideas are important and feasible.

How to do Dot Voting?

• Place ideas on the wall.

• Don't talk.

• Look at the solution.

• Put dots on the most exciting ideas.

• Place any questions or concerns on sticky notes.

In parallel of this activity, we recommend you start contacting 5 people who will be needed for day five's user testing. Each candidate will be needed for an hour.
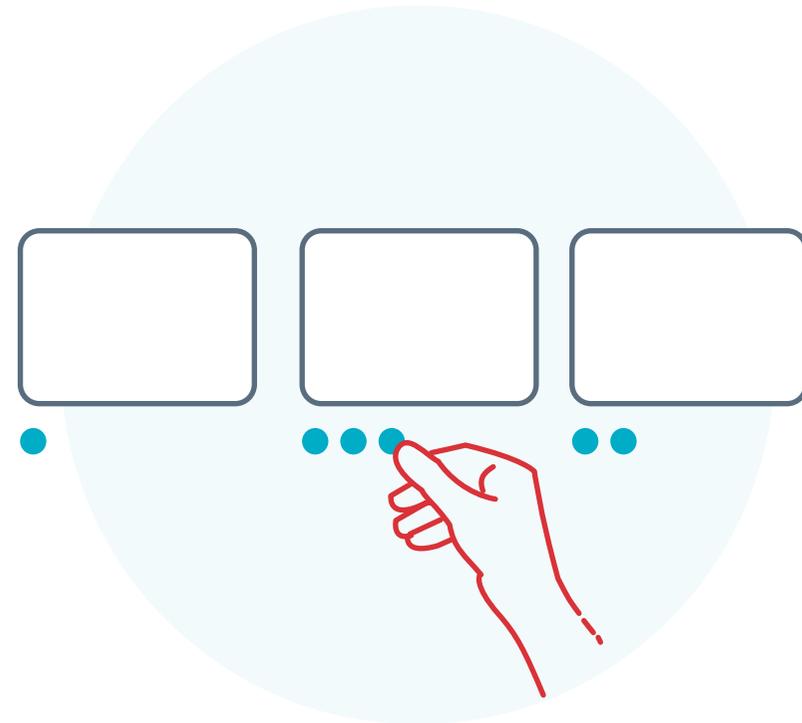
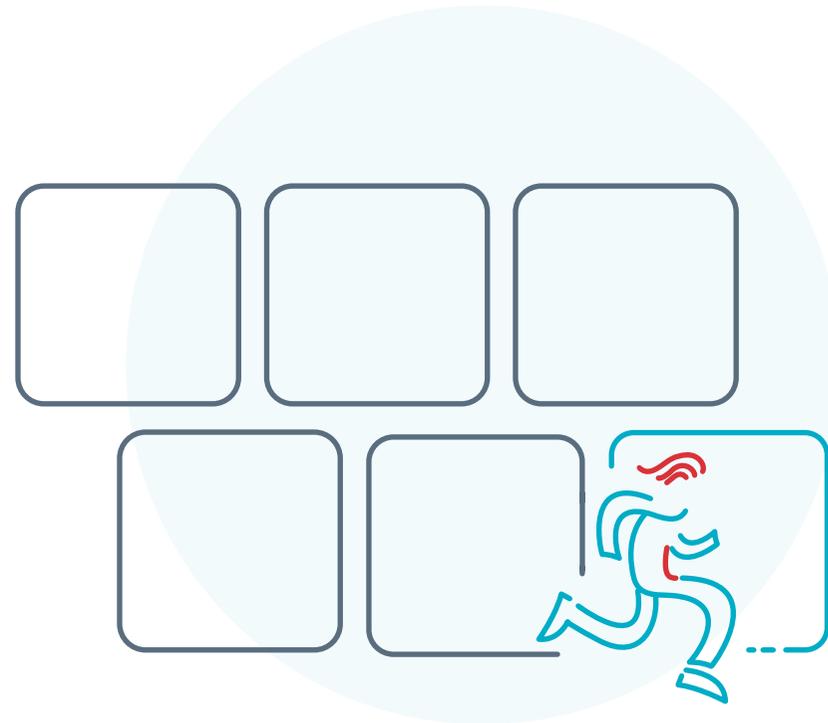>| Activity Dot Vote the ideas.

Individual Storyboarding

The ideas with the most votes are storyboarded. Storyboarding is a way to expand on an idea by telling a story in 6 frames from beginning to middle to end without too much detail.

How to create a Storyboard?

- Place six sticky notes on a piece of paper. On each sticky note draw a quick sketch and corresponding caption.
- Draw what customers see as they interact with the product. In this way you can communicate how customers move through the solution.

By the end of the session, you should have one storyboard per participant.

>| Activity Dot Vote the ideas.

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Day 3
Sketch

> Refined sketches
> Content for prototype

Decide

After day two's production of sketches, it's time to decide which ones have the best chance of achieving the long-term goal.

This involves a 7 step process that avoids lengthy debate:
• Tape solution sketches done on Day 2 to the wall.
• Each person puts dots on the most exciting ideas.
• Place any questions or concerns on sticky notes below the idea.
• Each person presents their idea and reviews questions or concerns.
• Each person privately votes for the best idea.
• Each person explains their vote.
• The ideas with the most votes are the ideas that will be storyboarded.

>| Activity Decide on the winning sketches.

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Sketch

The best ideas are woven together into one master story that represents the entire team's thinking. The storyboard is used to plan your prototype.

Here are some guidelines to sketch your storyboard:

- Nominate someone to draw.
- Draw a 15 box grid on the white-board.
- Opening scene: Think about the context where your customer encounters the product.
- Keep it simple.
- Draw the first frame and then the next discussing each step as a team along the way.

- Use the sticky notes from the winning sketches and place them accordingly.
- When you come across a gap - don't fill it in unless it is critical to the idea. If it needs to be filled use something from your "maybe-later" sketches.
- Don't try to perfect written content. Use what you have or fill in the detail later.

>| Activity Sketch the final storyboard.

Day 4
Prototype

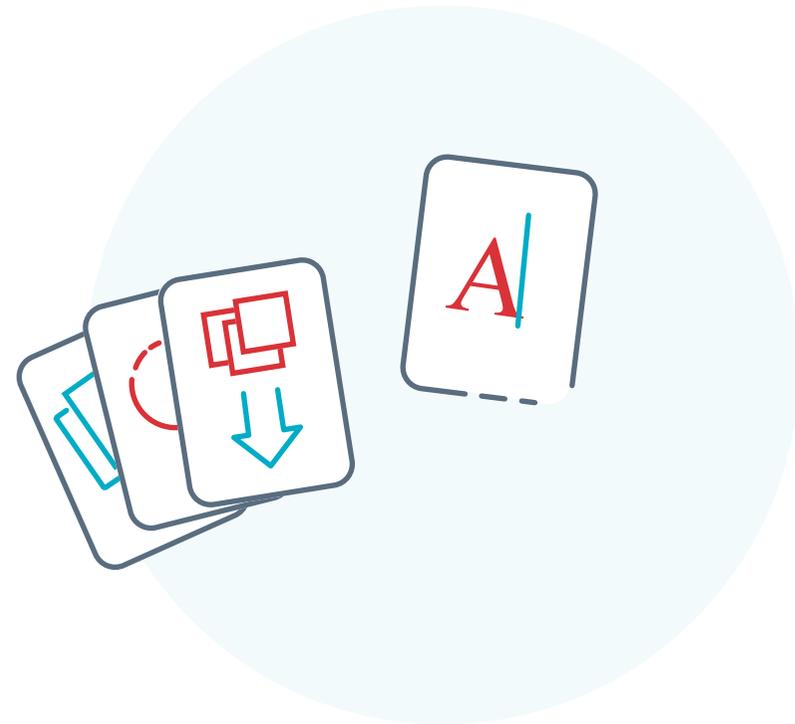> Prototype
> Technical Backlog
> Business pitch

Assign Roles

With the sketches done during day 3, the skeleton of the pro-
totype should be clear to everyone. It is now time for the entire
team to focus on building the prototype.

Each team member chooses a suitable role:

• The Maker create the screens.
• The Stitcher collects assets from the Makers and combines
   them into a flow.
• The Writer captures the content.
• The Asset Collector supplies the Makers with visual and
   data content.
• The Interviewer prepares for tomorrow's user interviews.

>| Activity Each team member chooses a suitable role.

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Prototype

The storyboard removes all the guesswork about what to include in the prototype.

How to create a prototype?

• Designers choose suitable tools.

• Follow the storyboard.

• Include just enough detail to generate genuine reactions from the test participant.

• Team members contribute the finer details such as assets, copy and data.

• Do a trial run mid-afternoon to make sure everything is as expected.
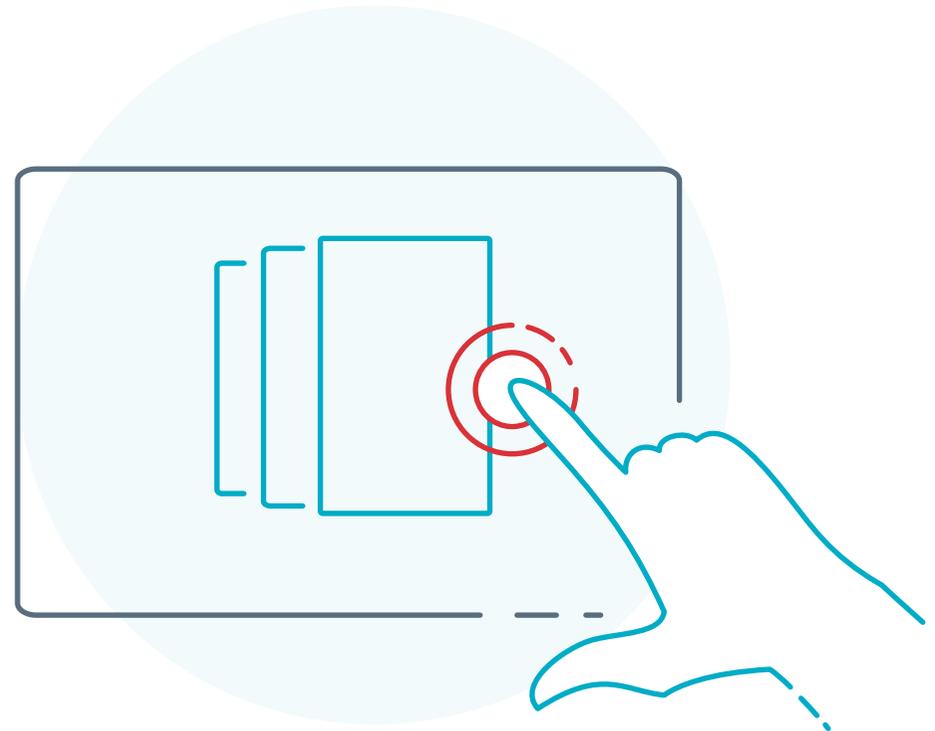
>| Link See mobile demo.

>| Link See desktop demo.

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Day 5
Validate

> Interview recordings or notes
> Insights from reviews
> Decision on follow up actions

User Interviews

Interviewing customers by watching them react to the prototype informs the team about how the product fulfills the customer's needs.

How to conduct interviews?

- A friendly welcome to start the interview.
- A series of general questions about the customer.
- Introduction to the prototype.
- Detailed tasks to get the customer reacting to the prototype.
- A quick debrief to capture the customer's overarching thoughts and impressions.

Taking interview notes:

- Take notes of interesting things you see and hear.
- Stick the notes on the white-board at the end of each interview.
- When the interviews are over place all the notes on the wall and look for overarching patterns.

>| Activity Interview 5 customers.

Discuss Interviews

The interviews take places in another room as the team takes notes whilst watching the live recording.

When the sessions are over, the team discusses the results and decides how best to follow up.

• Discuss how the prototype aligns with the product goals.
• Have a discussion on how best to follow up.

>| Activity Team takes notes.

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Wrap-up and Next Steps

By the end of the week, you know if the product is suitable for your customers or not. By verifying how we think customers behave when using the product, we are likely to build something they love.

With the backlog estimate in hands, you have visibility and confidence for the next phases of the project.

Typically the next two steps are as follows:

1. A six week design engagement. It is a series of cycles: (1) design, (2) validate and (3) learn. This lets you quickly test assumptions and designs with your audience.

2. A three month agile development phase where the minimum viable product is developed. Every project is different, so we tailor the engagement to fit your goals.

You have an idea for a project?
Let's discuss how we can help
make it happen.

Go to nearform.com/design
or contact us here

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