## the policy innovation lab playbook



## welcome



- 1 the user comes first.
- 2 understand the problem.
- **3** strive for impact.
- 4 manage your time.
- **5** expect more.
- 6 communicate early and often.
- 7 trust the process.
- 8 be willing to walk away.

## the user comes first



Love thy user.
But keep it professional.

## 01 the user comes first

Start your project by first trying to understand what <u>users</u>¹ need. Frame your question by focusing on developing a better sense of the problem, and avoid prioritizing any one solution until you fully understand the challenge you're faced with. Make sure you validate key assumptions early - and remember that your users will think and behave differently than you.

Embrace <u>user research</u><sup>2</sup> and what it means. Work to understand those impacted by the problem you are working towards solving. Your work will become more nimble and responsive to the needs of your users as your project progresses. Take the time to share updates with people you interview so they can see how their input is helping to shape your work.

User research activities like <u>interviewing</u><sup>4</sup> and <u>prototype testing</u><sup>5</sup> are integral to practice <u>human-centered design</u><sup>6</sup>. Your partner can help you identify people to talk to. Make sure you consider a diverse range of users and different <u>personas</u><sup>7</sup>.

### **Tips & Tricks**

It's never too late to conduct a user interview. Plan on regular sessions with users as your project progresses, and share updates as you go. People will like seeing how their input helped shape the prototype.

## understand the problem



Skyler is trying to understand, be like Skyler.

## 02 understand the problem

Once you've developed a better understanding of the users of a product or service, **try to determine the real**, **underlying problem or challenge faced by these users**.

Use your <u>user-centric framing</u><sup>8</sup> of the problem to get on the same page as your partner and team, and put you in a stronger position towards <u>developing a highly impactful Minimum Viable Product (MVP)</u><sup>9</sup>.

If your solution doesn't fix the core problem you've identified, then the work you do won't be as impactful for the partner, nor will it benefit the end users as much as it could.

### **Tips & Tricks**

Try using a <u>Current Reality Tree</u><sup>10</sup> to better understand how problems and outcomes are intertwined. Or, try creating a <u>customer journey map</u><sup>11</sup> or <u>service blueprint</u><sup>12</sup> with your partner to understand their perspective on how users interact with a current product or service.

Notes:

## strive for impact\*



\* The good kind, unlike the meteor in this graphic

## 03 strive for impact

While you want to be realistic about what can be completed in the time you have, **you also want to leave your partner with the highest-impact solution you can.** Keep this in mind when choosing where to focus the efforts of yourself, the team and your partner.

Use <u>rapid prototypes</u><sup>13</sup> and user research to quickly assess what ideas hold the most promise. Prototypes can also lead to richer discussions and further idea generation as it provides something for people to respond to. Use insights gained to further improve your work, while keeping you nimble and focused on the end user experience.

### **Tips & Tricks**

A <u>brainstorming / ideation exercise</u><sup>14</sup> can help you prioritize your best, feasible ideas first. Make sure you have a clear understanding of why you're choosing one direction over another.

## manage your time



[Insert witty quote]

## 04 manage your time

This course introduces tools that are designed to **improve transparency**. Therefore it's important to become comfortable with transparency about your work. Taxpayers entrust those in government to make responsible decisions, and one way we can show this is by **sharing progress as a project unfolds**.

Use the transparency in the process to share regular updates with your partner and others interested in your project, and **encourage collaboration**. Make sure that all your materials are professional and audience-appropriate. **Tools like Github, Trello, Slack, Notion and others** help your partner better understand your process and provide an opportunity for them to learn from your approach.

As you continue prototyping, prepare documents that are updated regularly for your partner to facilitate a smooth transition to implementation.

### **Tips & Tricks**

Use a quick, 30 second <u>daily standup</u><sup>15</sup> each morning to check in with each other. Between other obligations and busy schedules, try to touch base with other team members frequently outside of class to ensure you are not recreating work or miscommunicating. This will ensure you are ready to speak with your partner or share updates when asked in class.

## 05 expect more And encourage your buddies to do the same!

## 05 expect more

An exciting aspect of this class is **the opportunity to work on something that matters**. Try to make the most of it, and push yourself and your team members to do the same.

The course is a great opportunity to grow your own skills and learn something new, so try taking on a few tasks outside of your comfort zone. But also remember to always approach your team members and partner with empathy.

Use the <u>retrospective</u><sup>16</sup> as an opportunity to identify any problems and try to address them early.

### **Tips & Tricks**

Try running an expectations workshop with your team early in the project. This will help everyone get a sense of skills, needs and roles. Or, ask each team member to identify their superpower, or audacious goal. Having an idea of where you want to head can help you understand your bold vision and seeing how far you can get.

Notes.

## 06 communicate early & often



...even if it's a bit weird at first.

## 06 communicate early & often

Take time to communicate often with your team members and your partner. This will help ensure you, your team and your partner remain on the same page as the project progresses. Expect that your project will change over time as you learn more about the problem you're trying to solve. Set clear expectations and deliver regular updates through the weekly demos.

Some teams may find it useful to **designate one primary person to handle communications** with your partner. This can help streamline communication and minimize confusion while respecting the partner's time.

### **Tips & Tricks**

Whatever communication methods you choose, be consistent. Once you build expectations with your partner you want to keep them. If you deliver weekly updates by close of business Friday or daily updates through a standup, don't deviate from the schedule without a good reason.

Assign clear owners and deadlines for tasks. Make sure that for each task there is one, clear owner. It doesn't mean this is the only person who can or should work on a task, but they should be the one responsible for seeing it through, and asking for help when needed.

Notes:

## trust the process



## 07 trust the process

Through this course you'll be introduced to a lot of new concepts for the first time, and you may be asked to apply them before you fully understand these processes. This course and your project will move quickly, so it's important to trust the <u>agile methods</u><sup>17</sup> and human-centered design approach that you're learning.

Make sure you take the time to learn the basics of agile and human-centered design as you transition into your project work, and share what you learn with your partner. Remember that you're not alone: the adjustment towards human-centered design can also feel uncomfortable for your partner, and together you'll figure out the best way to leverage the insights gained towards the advancement of your work.

### **Tips & Tricks**

Read the <u>Agile Manifesto<sup>18</sup></u> and see <u>IDEO's Human-Centered Design Toolkit<sup>19</sup></u> to get a jump on understanding these approaches to your work.

Γ,	

# be willing to walk away



And scene.

## 08 be willing to walk away

In a fast moving project, your prototyping will start while you're still learning. You may find out why an idea won't work as you learn more. When you do, use what you've learned to explore a more promising direction.

Don't be afraid to walk away from a prototype if it no longer makes sense.

### **Tips & Tricks**

Use a <u>SWOT analysis</u><sup>20</sup> to help you sort through the viability of different approaches. Make sure you don't invest more time in products or services that don't help you address the user needs you've already identified.

Notes.

## the tech index

## Slack

Use **Slack** to communicate informally with your teammates and partners. Make use of the 'channels' function to create different topics of discussion - i.e. 'project, learning, random stuff'. The 'public' and 'private' functions can also help you regulate who has access to certain channels.

## **Gmail**

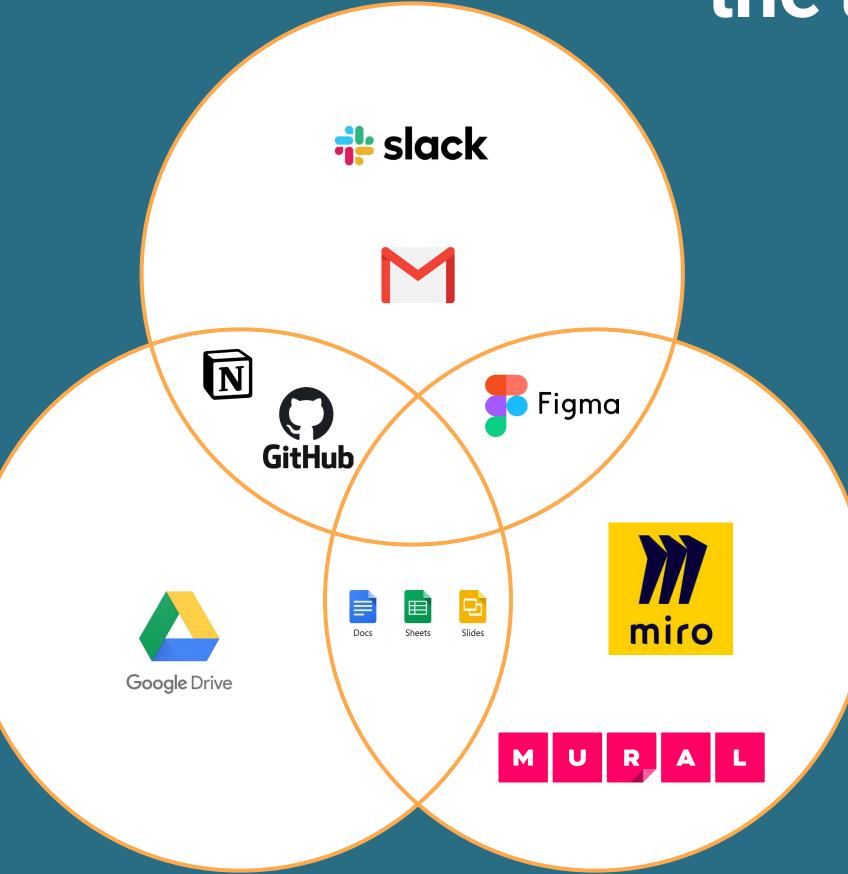
Use **Gmail** to communicate formally with your teammates and partners. Emails should be well structured, clear and concise. Often, over communicating will work in your favor.

## **Notion**

Use **Notion** for effective project management and task delegation/ monitoring. Notion has a lot of handy in built tools such as Kanban Boards and several templates for meeting minutes, note taking and daily stand-up meetings. You can also use the plug-ins to link Google Drive, Figma and other third party software into Noton.

## **GitHub**

Use **GitHub** for open source project management and development tools such as Kanban boards. GitHub also serves as a popular software coding repository.



communication

## **Figma**

Use **Figma** for the rapid prototyping of apps, websites and other visual platforms. It is a tool that can be operated directly out of your website browser and does not require a dedicated software. This makes prototypes easier to share with partners for demonstration and feedback.

## Miro / Mural

Use **Miro / Mural** for interactive and real-time brainstorming, workshops, dot voting and ideation. They have several templates which are quick and easy to use.

## Google

## **Docs / Sheets / Slides**

Use **Google Docs / Sheets / Slides** for easier collaboration and file sharing.

## **Google Drive**

Use **Google Drive** to for file sharing and management. You can edit permissions and create separate folders for team and partner access.

organization

collaboration & creation

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