Human-Centered Design @ KP

POCKET GUIDE

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When we
take time
to connect,
we thrive

Introduction

How to Use This Pocket Guide

Human-centered design is a creative problem solving methodology that puts people and their needs at the center of all solutions. Use this guide to identify ways to create experiences, products, services, and deliver outcomes that delight our customers while helping them thrive.

The pocket guide summarizes the mindsets and key methods of human-centered design at Kaiser Permanente and the shared language and approach we use across the organization. The information it contains can be used by anyone, regardless of role, job title, or background.

Who Are Our Customers?

When we say "customers", we mean anyone inside or outside our organization who uses the programs or services we develop. Customers can be our members, patients, their families, providers and staff, or outside companies and/or groups that we engage.

Kaiser Permanente's Opportunity: Delighting Our Customers

The landscape of healthcare is shifting rapidly. New technologies are reshaping our work, regulations are changing, and cost pressures continue to mount.

And, most importantly, our customers are ever more informed, mobile, and connected healthcare consumers who are empowered to choose. They want care and services that align with their preferences and meet their needs – and they are delighted by experiences and outcomes that exceed their expectations.

Engaging and delighting our customers is a critical part of the Triple Aim of improving population health and the care experience and making care more affordable. Delighting our customers is also essential for our capacity to continue to be a leader in our industry. To do so, we must partner even more deeply with our customers, act even more quickly and collaboratively, and deliver experiences, products, services, and outcomes that surpass customer expectations.

Leading organizations across industries are responding to similar changes by engaging more than ever with their customers. By deeply connecting to their customers' needs, they provide innovative and meaningful experiences, products, and outcomes.

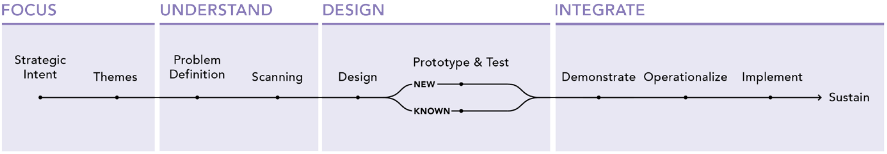
Our Strategy for Success

Kaiser Permanente has a rich legacy of continuous improvement and innovation in care delivery, organizational systems, and service offerings. We leverage a framework we call "Xcelerating Learning and Spread" or XLS to strategically focus on what's most important, deeply understand the current state, improve existing offerings or design new ones, and systematically integrate these solutions across the organization. Human-centered design is a suite of methods and mindsets embedded within the XLS framework that equips us to uncover and address the human aspects of problems and opportunities.

We apply human-centered design to develop new offerings, as well as to improve existing programs, systems and experiences. Human-centered design complements KP's robust systems for performance improvement and enables us to create holistic solutions that are solid from human and systems perspectives alike.

The unique contribution of human-centered design is that it excels at diving into ambiguous and messy challenges, improving existing solutions and developing new ones by centering on our customers' needs and values. It fosters an innovative, creative, and even more customer-centered approach that we can apply to critical opportunities at the local, regional, and national levels.

Xcelerating Learning and Spread

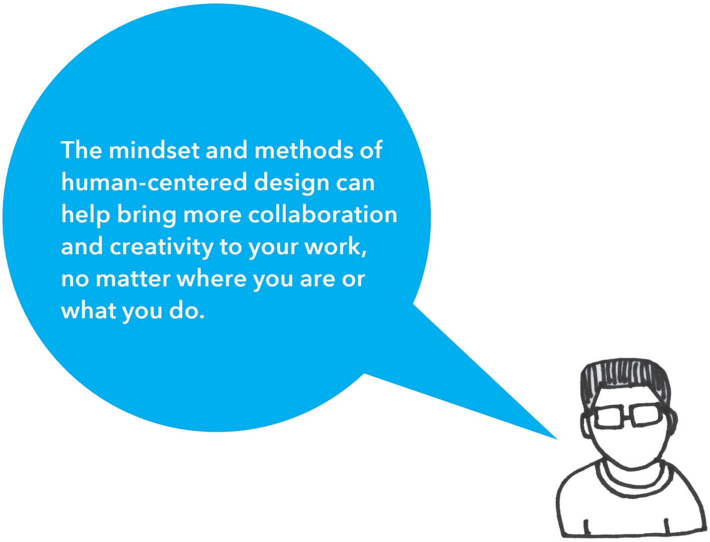


Evolution of Human-Centered Design at Kaiser Permanente

Kaiser Permanente is recognized as a leader in integrating human-centered design into healthcare. Beginning in 2003, we pioneered the application of human-centered design to improve and innovate care delivery for large scale organizational initiatives. We taught and spread novel practices such as video ethnography and CoDesign and created human-centered design catalysts.

Using human-centered design, we have significantly improved the care delivery space by making hospital-to-home transitions more patient-centered, created better nurse shift change processes, and gained new insight for innovation in the behavioral health space. We have transformed the design of our ambulatory clinics and hospitals and made them more people-centered. We have illuminated operational challenges in the procurement space, emphasizing not only systems but also the human factors that are key to developing new solutions and better processes.

We invite you to join us as we expand the reach of human-centered design across KP through shared language, the growing community, and deepening of competencies of our staff and teams in delighting our customers with great experiences and outcomes.

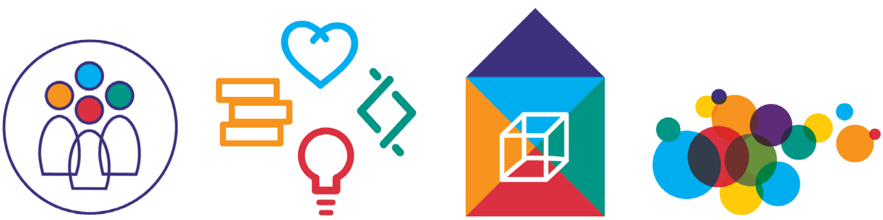


Human-Centered Design @KP

At Kaiser Permanente, we take the traditional approach to human-centered design to the next level by actively partnering with our customers all along the journey to design or improve care, systems and programs. CoDesign with our customers is a central principle in our application of human-centered design. This method is different than traditional approaches for gathering information by observing customers or asking them for feedback about possible solutions; our customers can be our partners at every step. We call this expanded approach Human-Centered Design @KP (HCD@KP) – and it is our commitment to work towards partnering with patients – and all our customers – throughout the human-centered design process.

Our Formula for Success

Spreading human-centered design in an organization is a purposeful effort that takes transforming the culture, embedding new skills, and creating spaces that support this way of working. To expand the reach of HCD@KP we are further empowering PEOPLE across Kaiser Permanente to think and work in new ways through the application of new skills and a culture of creative collaboration. We also apply a shared set of PRACTICES in environments or PLACES that nurture new behaviors and closer collaboration. These building blocks create new OUTCOMES that improve care and delight our customers by meeting their needs in inventive and meaningful ways.

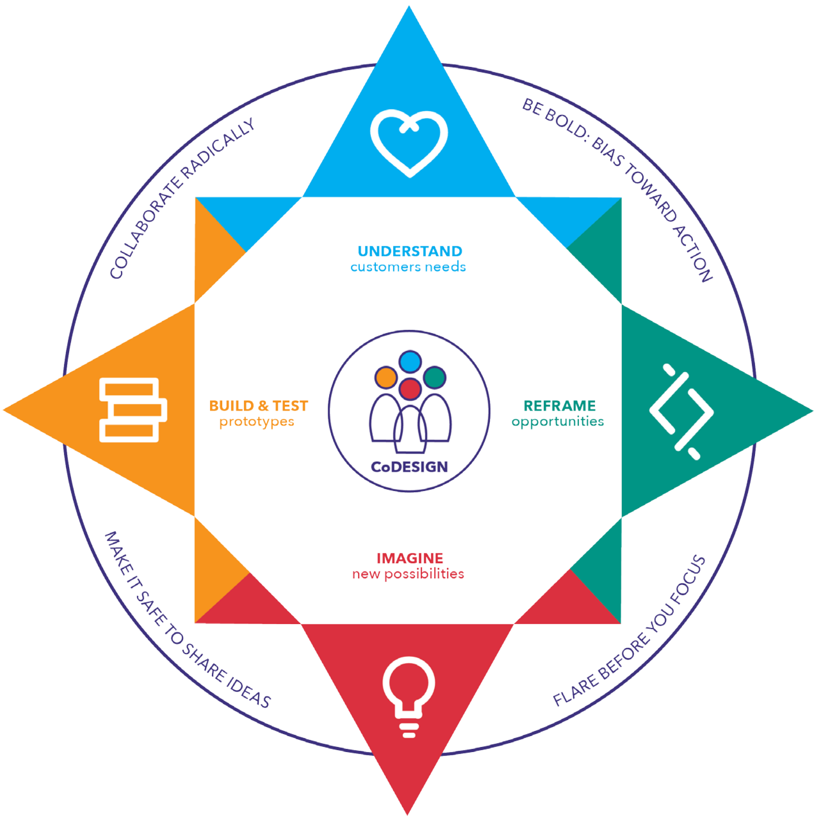


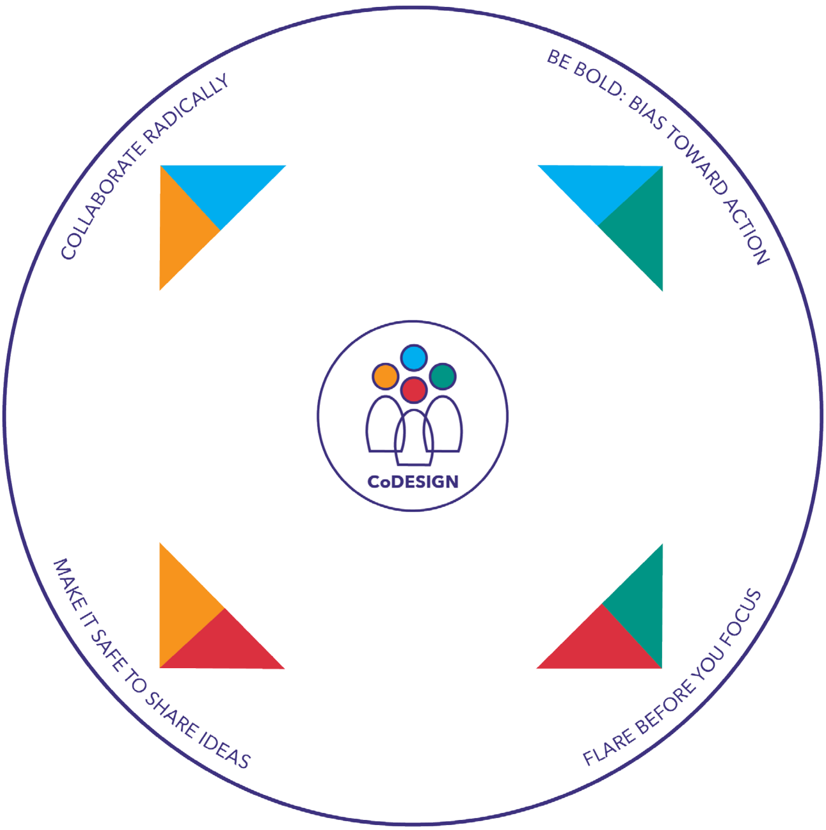
PEOPLE + PRACTICES + PLACES = OUTCOMES*

*From IBM Design (People + Places + Practices = Outcomes)

The Human-Centered Design @KP Compass

The HCD@KP Compass is at the heart of how we work. It builds on and embeds human-centered design within the KP Value Compass. The inner circle reflects PEOPLE at KP who are empowered by the skills and mindsets of human-centered design and the customers we partner with. The PRACTICES of Understand, Reframe, Imagine, and Build/Test are the human-centered design phases that teams go through, applying specific methods. The PLACES represented by the outer circle reflect the types of environments that best support the practice of human-centered design. Each element in this compass is unpacked in the sections that follow.




COLLABORATE RADICALLY
BE BOLD: BIAS TOWARD ACTION
CoDESIGN
MAKE IT SAFE TO SHARE IDEAS
FLARE BEFORE YOU FOCUS

Introduction to People

People are at the core of HCD@KP. We collaborate and communicate in new ways, helping to foster a culture in KP that supports creativity, risk-taking, and profound collaboration across diverse functions and roles. This section introduces a few actions you and your team can take to begin to reshape your work.

> Embrace team norms that support trust, collaboration, and creative confidence.

> Introduce daily behaviors that bring the methods of human-centered design into existing routines.

"Our Kaiser Permanente Northwest leadership knew that gaps existed. They also knew that the only way to truly close those gaps was to hear directly from patients. Using CoDesign, we brought together patients, caregivers, operational leaders, functional leaders, physicians, and front line staff – a true multidisciplinary team – to look at the end-to-end experience. The conversation deeply affected all participants. For many leaders in the room, it was their first time to partner in this way with patients, and they immediately saw the benefit. For the patients and caregivers present, it was part of the healing process. The outcomes to date have had a great deal more stickiness because the whole team was involved, as opposed to "us" speaking for the patient and hoping we got it right."

–Jonathan Bullock, KP Leader for Patient and Family Centered Care

Team Culture and Team Norms

Human-centered design is a team sport. It requires strong collaboration and communication within your team and across diverse teams. Here are four cultural norms used by Kaiser Permanente teams that support our ability to work as a creative team and effectively use human-centered design methods.

BE BOLD: BIAS TOWARDS ACTION

Effective teams don't get caught up in debate around a conference table. When questions arise about which direction to take, they take action: they talk to customers, build prototypes, and test ideas.

Sketch your ideas and create rough prototypes to help your team increase its ability to influence, communicate ideas, and ensure alignment in meetings. Expressing ideas visually helps reduce the risk that people are using the same language to describe different solutions.

MAKE IT SAFE TO SHARE IDEAS

Sucessful teams create a culture where it is safe to take interpersonal risks without fear of reprisal.

As a team, brainstorm behaviors that help make members feel safe. Establish a few team ground rules that support them. Examples might include:

> Publicly encouraging a team member who makes a mistake, focusing on what they learned rather than critiquing them

> Acknowledging and giving praise when team members share ideas that are different or unique

> Encouraging team members to ask each other for help

Everyone needs to feel that his or her contributions are valued, and team members feel safe to:

FLARE BEFORE YOU FOCUS

Even if your team is sure you understand the problem at hand, spend some time exploring it before looking for solutions. What issues are related? Who else is experiencing them? Is there a facet of the problem you don't fully understand? What similar – or different – issues can help deepen your understanding? Investing this time helps ensure that you're targeting the right problem.

Do the same thing with solutions. Rather than running with a preconceived idea, take time to seek inspiration from a variety of sources and brainstorm many possible solutions before filtering and deciding on a solution to test.

When starting a meeting, take a moment to clarify with your team whether the goal is to flare and explore multiple possibilities or focus and choose a path forward.

COLLABORATE RADICALLY

The greatest inventions often arise when people with diverse backgrounds and perspectives come together to share their ideas. Seek out different customers and colleagues from other departments and even other industries to help you imagine new solutions and bring in unique perspectives. Invite them to join your meetings in person or by phone.

Daily Behaviors to Support HCD@KP

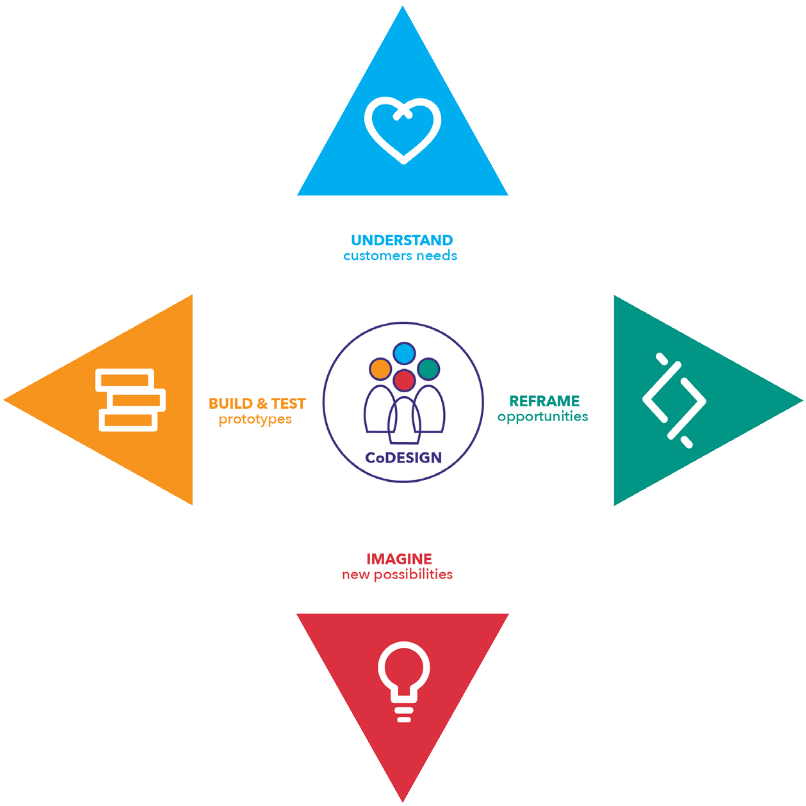
Anchoring small changes to existing routines is key for creating new habits. Here are some small behaviors that bring a human-centered design approach to your daily work:

WHAT DO OUR CUSTOMERS SAY?
When deciding on the next project or making decisions about your current one, ask yourself: Do we know what our customers need and what they experience? If you don't know what your customers' thoughts, needs and experiences are, find out!

HEAR ALL VOICES
When starting meetings, invite everyone to put their name badge on the table as a reminder that everyone's ideas are valuable and equally important, regardless of role or title.

YES, AND...
When a colleague suggests an idea, try to find something valuable in it and build on it. This is a good habit to allow ideas to grow and flourish.

I LIKE, I WISH, I WONDER
When you give feedback, use "I like, I wish, I wonder" to frame your feedback in a constructive way. For example, "I like the concept of virtual consultations, I wish I knew how our less technologically savvy customers might respond, I wonder if our app had a "Mayday" feature like Amazon kindles have?"


UNDERSTAND
customers needs
BUILD & TEST
prototypes
CoDESIGN
REFRAME
opportunities
IMAGINE
new possibilities

Introduction to Practices

Practices are the methods and techniques that create a shared language and approach to problem solving and identifying innovative customer-centered solutions. These practices also give us templates and frameworks to use in meetings and projects. In this section, you will learn how to create human-centered goals, CoDesign with customers, develop Metrics that Matter, and use human-centered design practices across the life-cycle of your projects.

While there are many human-centered design methods available, we've chosen a few key methods. We encourage you to start with these methods, which can be used from the start of a project – all the way through the end of a project cycle.

1. **Listen to customers:** Ethnographic interviews

2. **"Go and See":** Observation and shadowing

3. **Synthesize your learnings:** Empathy map, journey map, personas

4. **Frame the opportunity:** "HMW" statements

5. **Explore solutions:** Group brainstorm

6. **Share the story:** Storyboarding

7. **Bring your ideas to life:** Rapid prototyping

8. **Testing with customers:** Field testing

Method: Human-Centered Goals

Starting with the customer in mind

When we focus on our customers, it helps to start any initiative or project we do with the end goal that focuses on customers.

A good human-centered goal will serve as the north star for the project and keep reminding the team what we want to accomplish for the customer.

LET'S DO ONE

STEP 1: Decide on why you are starting to do a particular project. Have you learned something from customers already? Are you starting with organizational data? Write out your goal.

STEP 2: Now frame that goal from the human perspective. What will achieving this goal do for the customer? Rewrite your goal.

STEP 3: Display this goal prominently for your team members to see and ground themselves throughout working on the project.

STEP 4: Update the goal if needed. As you start talking to customers and learning more about their needs, you might uncover a different angle for the goal – or a different goal altogether.

TIPS & TRICKS

If you have customers on your CoDesign team, co-write the human-centered goal together.

Example of a reframed goal:

Systems-focused goal: Implement depression care management programs across KP.

Reframed to a human-centered goal: Any member who feels "off" emotionally can get trusted, personalized help, when, where and how they want it.

TIME

20-30 minutes

TEAM

Your team. Customers. Stakeholders.

TOOLS

Paper, pen, post-it notes.

Method: CoDesign with Customers

Side-by-side collaboration

Whether they are external – members, families, or purchaser groups – or internal KP staff and providers, CoDesign engages customers as partners with your team. By inviting your customers to partner with you from the beginning to the end of a project, you encourage them to engage more deeply and empower them to share their ideas. In turn, you gain a deeper understanding of their needs and of solutions that are best positioned to meet their needs.

LET'S DO ONE

STEP 1: Identify your customers. Who are the people who will be on the receiving end of the programs and services you are developing? Use the CoDesign toolkit (see link below) to help you identify, screen and recruit customers to be a part of your team.

STEP 2: Identify your stakeholders. Which KP staff or providers will be affected by the programs and services – or will have to make changes in their work to deliver those programs and services? Will caregivers of patients need to play important roles?

STEP 3: Decide on how you will run your projects: do you want your customers in all your working team meetings? Or engage them at key decision points? All are options.

STEP 4: Bring your customers, your stakeholders, and your team together to tackle the opportunity area.

TIPS & TRICKS

Invite customers who have had direct experiences with the topic you are focusing on – you want to hear their first-hand experiences.

When recruiting members or their families for CoDesign, start by asking staff and providers for referrals, browsing member education and support groups, and checking with patient advisory councils. Seek customers who are supportive of the KP mission and able to work well in a collaborative group setting.

Use human-centered design tools and activities to structure your CoDesign meetings. For more on the CoDesign session structure, see the KP CoDesign toolkit (see link below).

TIME

Throughout your project.

TEAM

Your team. Customers. Stakeholders.

TOOLS

Paper, pen, post-it notes, KP CoDesign toolkit: http://bit.ly/HCDatKP

Method: Metrics that Matter

Weave together metrics with meaning

How do you define a successful outcome for your project? You may already be clear what success is from KP's point of view (e.g. no surgical site infections) But for a patient, success may also mean being able to attend a wedding, or picking up a grandchild, or not having three different numbers to call after being discharged from the hospital to get answers. Both the organizational and customer metrics should be barometers of success. Develop a list of Metrics that Matter as you start to understand your customer needs – and continue adding to it as you start developing ideas and testing prototypes.

LET'S DO ONE

STEP 1: Review: Take another look at your notes from interviews, shadowing, observations and ideas – what mattered to customers? Write out those metrics in the customer's voice.

STEP 2: Validate: Use CoDesign sessions, interviews, and customer observations to ask them to share their responses to the following questions:

> How will we know we are bringing value to you with this idea?

> In what way would your life change for the better with this idea?

> What do you need to be able to do, see, or feel if the idea is implemented well?

STEP 3: Combine with any organizational or systems-focused metrics for a holistic set of metrics that matter to track success.

TIPS & TRICKS

Metrics that matter to customers could be tangible: "I need to be able to insert an intravenous line before I leave the hospital."

Metrics that matter can also be emotional: "I need to feel confident all my providers have the same information about me."

Write our Metrics that Matter to customers in customers' voice:

"I need to (do, feel, see…) _____________
____
____
____
__________________________________."

TIME

20-30 minutes

TEAM

Your team. Customers. Stakeholders.

TOOLS

Paper, pen, post-it notes.

Our human-centered goal is:

____

____

Our CoDesign partners are:

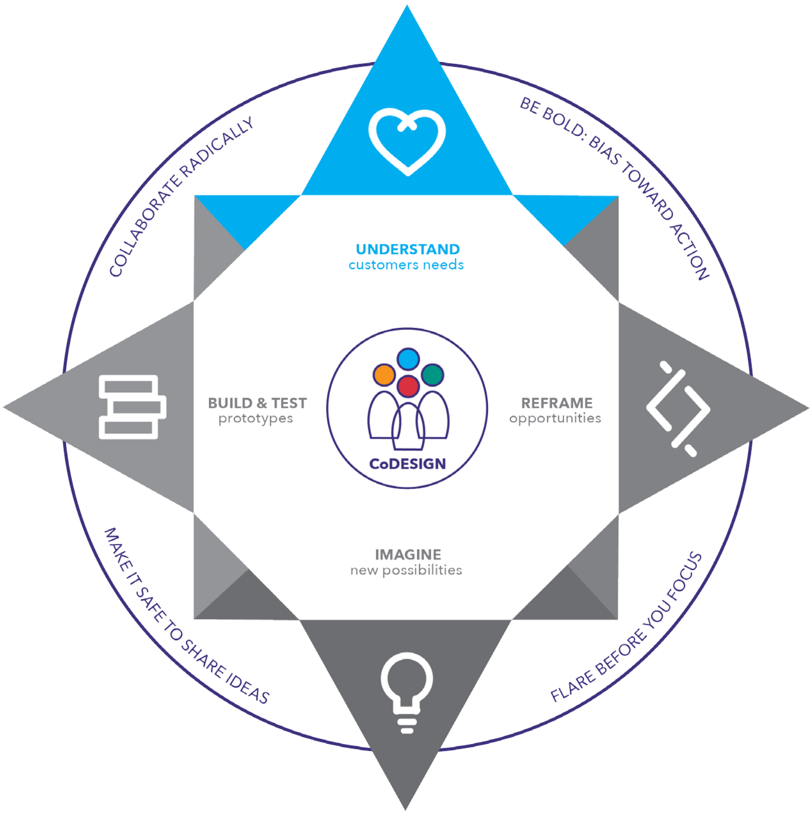
____

____

Metrics that matter to our customers:

____

____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customers needs
REFRAME
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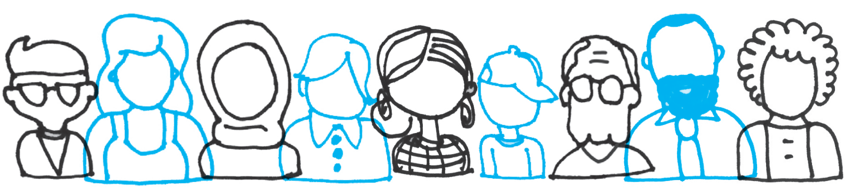
COLLABORATE RADICALLY



UNDERSTAND customer needs

This phase helps us:

> Uncover what our customers truly value

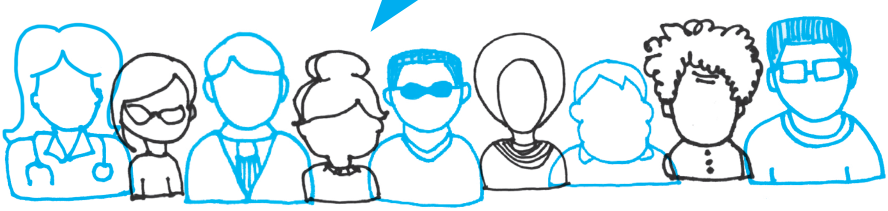
> Discover opportunities to meet "unmet" needs of customers

> Challenge our own assumptions by understanding the perspectives of others

> Feel confident that we are solving for the right problems before we invest in solutions

"As much as we try and think we are good at it, we cannot imagine our members' experience very well without engaging them. As part of a process improvement project using a CoDesign approach, we invited a Patient Advisor to walk us through the experience of being a patient transported to and from the cardiology treadmill testing room. The patient asked why he was only allowed to wear a hospital gown, and we realized there was no reason patients couldn't wear undergarments for this test. As a result, our project team added a note to the nurse checklist for the test specifying that patients should be dressed in pants and socks."

–Jenny Cunha, Performance Improvement and Innovation Consultant Greater Southern Alameda Area, KP Northern California Region



Method: Ethnographic Interviews

Listen to people

An Ethnographic Interview is an intentional conversation to understand a problem from different perspectives – those of your patients, stakeholders, customers, and/or colleagues.

Ethnographic Interviews are an essential first step at the beginning of a project and are useful throughout a project for gaining insight, building empathy, and finding inspiration.

LET'S DO ONE

STEP 1: Pick your topic: Decide on the aspects you would like to learn about. Write a short interview guide with questions you'd like to ask.

STEP 2: Find someone to talk to: Ethnographic interviews are best done in a person's natural environment: where they live, work, or where they experience the activity we want to understand. You might want to interview someone impromptu, e.g. in the waiting area – or schedule an interview.

STEP 3: Introduce yourself: "We are working on making medication pick up easier. Could I ask you a few questions about your experience with medication pick up?"

STEP 4: Have a warm conversation: Ask your questions in an open-ended way. Remember, you want to hear their story. Ask for concrete stories: "Tell me about the last time you came in to pick up your medications." Ask follow up questions: "Why is that?" "Would you tell me more?" "Would you be able to share an example?" Don't forget to make eye contact.

TIPS & TRICKS

Buddy up: A colleague can take notes, add perspective, and can be your debrief partner afterwards.

During the interview: Listen 90%, speak 10%, don't judge! Make it easy for the person to share any side of the story.

Dialogue: Good interviews use questions to both encourage storytelling and focus the discussion. Aim for a conversational feel – not a strict survey-like question and answer.

Privacy and compliance: If private information is being shared, make sure no else can hear. Offer to take the conversation to a more private place. Using photo, video, and audio needs extra preparation. Check out the tools section for how to prepare correctly.

Extreme users: Include "extreme users" in your interview list. These may not be your representative customers, but you can learn a lot from people who are using the system beyond regular expectations.

TIME	TEAM	TOOLS
15-60 minutes	1 Interviewer. 1 note-taker (if available). Avoid bringing more than 2-3 people – not to outnumber your customer.	Notebook and pen. KP policy for use of photos & videos: http://bit.ly/HCDatKP

Method: Observation and Shadowing

Seeing what people do, not just what they say

Observation reveals unmet needs, new opportunities, creates deeper empathy and provides insights that may not come up in conversations. With observation, you are a "fly on the wall", taking note of activities and behaviors that happen around you.

Shadowing is a version of observation where you ask someone to walk side by side with them as they complete a task in the real setting. Observation and shadowing is an important complement to interviewing.

LET'S DO ONE

STEP 1: WHAT: Identify the task, situation or an activity that you would like to observe.

"I'd like to see a patient get medications from a pharmacist."

STEP 2: WHO: Recruit a participant to share their daily experience with you.

"I'd love to see what your day is like and the challenges you may face getting your medications from the pharmacy. I'm here to learn not to evaluate."

STEP 3: WHEN/WHERE: Try to schedule the activity when you're likely to see what you're interested in. Like the morning rush? End of day?

STEP 4: SHADOW: See, Show and Tell: What do you see? What's in the environment? Out of place? Who is there? Ask your participant to explain what they're doing to understand their thoughts and feelings. Ask them to show you examples.

TIPS & TRICKS

Build trust: Have a conversation first about what you are hoping to learn and how you will use the information you gain.

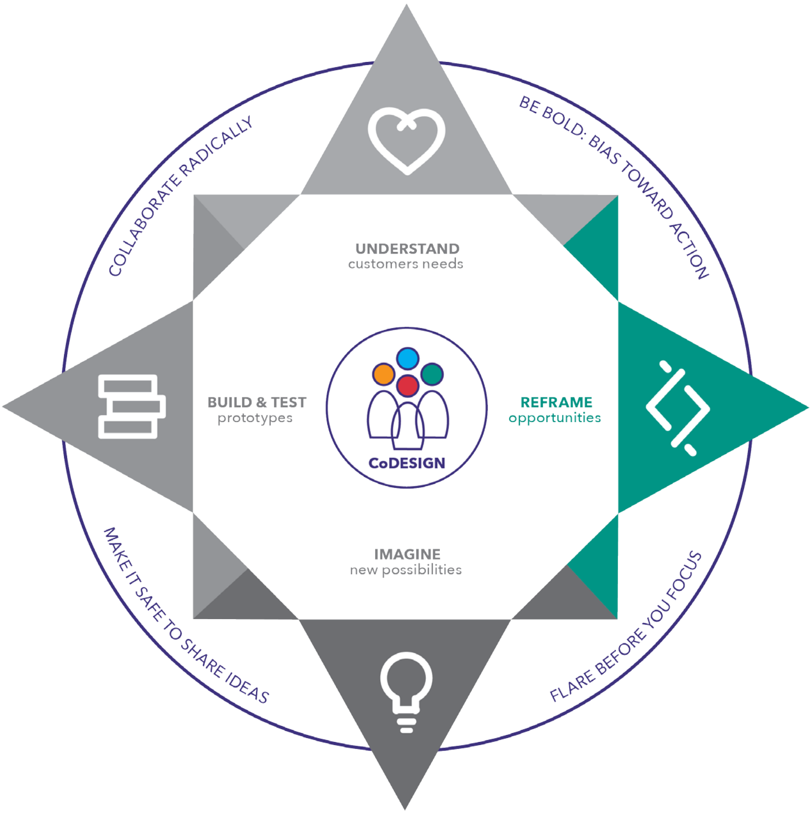
Ask for permission: Plan in advance. Check with the manager for permission to shadow staff or patients. Always get the participant's permission.

During the observation:

1. See with fresh eyes and use all your senses. What do you hear, smell, and sense?
2. Watch and listen 90%, speak 10%
3. Make sure staff are aware of why you are there and always ask for permission if you're not sure of something. Remind them that you are there to learn to improve and innovate.

Collect artifacts: Where appropriate, ask to collect artifacts, such as form blanks, photos of signage or environments. For appropriate use of photo and video, please refer to the Tools section.

TIME	TEAM	TOOLS
30-60 minutes shadow 10-30 minutes debrief	1-2 people (not to overwhelm the person you are shadowing).	Notebook and pen. KP policy for use of photos & videos: http://bit.ly/HCDatKP



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REFRAME opportunities

This phase helps us:

> Organize customer data from multiple sources and look for trends and opportunity areas

> Identify new opportunities and customer needs before jumping to solutions

> Align teams and leadership around the problem to be solved

> Keep teams open to multiple possible solutions, rather than fixating on a single solution

"We did a project on expediting the hospital discharge process for elective surgical patients. The challenge seemed to be a scheduling issue: "How might we efficiently get all the necessary care team members to the patient's bedside in a timely manner for discharge prep?" After talking to patients, we learned that discharge was delayed for non-clinical things, like checking to see if homes were safe for recovery and whether patients had access to meals and caregivers. Our new challenge became: "How might we prepare people and their homes for discharge before their surgeries?"

–Kat Khoo, Innovation and Design Lead,
Los Angeles Medical Center, KP Southern California Region

Method: Empathy Map

SAY * THINK * DO * FEEL

Empathy Maps are useful for synthesizing learnings and starting to apply inductive thinking to your customer research. This is a visual process to refresh your empathy and begin to define actionable categories defining your opportunity space. An Empathy Map is a great space for group synthesis, where all members of your team can deposit their insights.

LET'S DO ONE

STEP 1: Prep: Scan your interview/observation notes for quotations, key words, and things you saw. Write them on post-its. Prep can be individual, but all other steps should be done as a group. **Draw your map:** Take a sheet of paper and draw a graph with four quadrants. Label each quadrant with **SAY**, **THINK**, **FEEL** , **DO**.

STEP 2: Now place your post-its, artifacts, and notes into the appropriate quadrant. Think critically beyond the literal meaning. Consider the meaning behind what you collected.

STEP 3: Look for patterns or similarities in each quadrant and cluster post-it notes with similar themes together.

STEP 4: Label each cluster with a phrase that captures the core meaning you are seeing in each cluster. These will form your core insights.

LET'S DO ONE

Encourage your team to add direct customer quotations into the **SAY** quadrant, customers' assumptions and expectations into the **THINK** quadrant, their emotions into the **FEEL** quadrant, and what customers are doing or struggling to achieve in the **DO** quadrant.

Draw an empathy map in your notebook and use the strucutre to take notes during your observation and shadowing.

The number of post-its in each quadrant can tell you a lot. For example, if you step back and see that the **FEEL** quadrant is full of post-its, pay attention to it – could it be that your customers don't have a good outlet for their concerns and accumulate a lot of feelings about the issue?

Invite your customer to see your empathy map – or co-create with you.

TIME

Prep: 10 minutes or more
Activity: 30-60 minutes

TEAM

Your team - and any relevant stakeholders you'd like to include. Split into small groups of up to 6 people. 1 facilitator per group.

TOOLS

Paper, pen, post-it notes.

Method: Journey Map

Your customer's journey

A journey map helps you visualize the emotional experience of some-one going through the sequence of steps it takes to complete a task.

Journey maps are great for capturing insights from processes because they identify bright spots in a process that work well, and pain points where the customer's experience can improve.

LET'S DO ONE

STEP 1: Setup: (e.g. on a series of flipcharts) mark the key touchpoints that the customer experiences throughout the process (e.g. making an appointment, checking in, waiting in the waiting room, etc). Draw a horizontal line that separates positive experiences (at the top) and negative experiences (at the bottom).

STEP 2: Extract experiences from the interviews and observations into short phrases and write them on post-it notes (one experience per post-it note). Mark the emotion associated with the experience. Add a note with any additional context you learned from your interviews and observations. Place the post-its onto the journey map.

STEP 3: Identify key points on the journey map where customers have negative emotions or unmet needs. These areas will often help you develop your How Might We statements.

TIPS & TRICKS

Positive experiences are just as important – they can tell you what you should continue to keep doing – or spread more broadly.

Depending on your audience, working with a designer can help to create a higher fidelity version that can become a useful communication tool for sharing customer experiences to many audiences.

A Journey Mapping session can be done live with a group of customers, where customers themselves write their experiences and emotions on post-it notes. This can be another way of gathering insights from customers, in addition to interviews and observations.

TIME

20 minutes
to several hours

TEAM

Your team – and any relevant stakeholders you'd like to include. Split into small groups of up to 6 people. 1 facilitator per group.

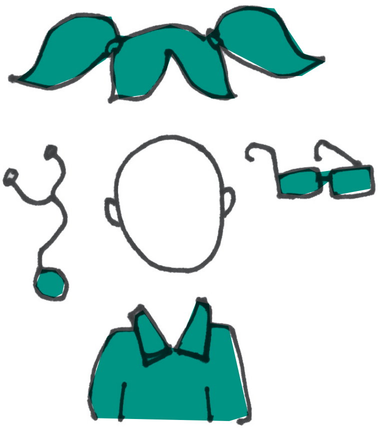
TOOLS

Paper, sharpies, post-it notes.

Method: Personas

A composite image of your customer

Creating a persona can help your team refocus on who your customers are. Personas take behaviors, attributes, and needs gathered through research into many customers and assemble them into one or a few short profiles that represent common themes (similar to a baseball card). Personas help your team strike a balance between creating one-size-fits all solution and focusing too much on individual customization.



LET'S DO ONE

STEP 1: Review: Look at your customer insights and group them into clusters of similar themes. See if one type of a customer persona emerges, or multiple.

STEP 2: Create your own persona: Create a short "profile" of your composite customer (for example: recent college grad, first-time pregnant mother, frequent traveler). What motivates them? What are their existing routines or behaviors? What matters most to them? Give your persona a name and a face (e.g. an online stock photo).

STEP 3: Display: Post the persona in your project space. When making design decisions, reference the persona. Would the solution being proposed address the needs of this population?

TIPS & TRICKS

Put all your data up on a wall so you can see it visually.

It's often useful to copy your key quotes and ideas from notes to post-its for easy reorganizing and visualization.

Have you learned customer needs or preferences that are different, or even opposite from each other? Create several (2-4) personas that capture the big buckets of needs and focus on creating solutions that meet the needs of each persona.

TIME

30-40 minutes

TEAM

Your team – and any relevant stakeholders you'd like to include. Split into small groups of up to 6 people. 1 facilitator per group.

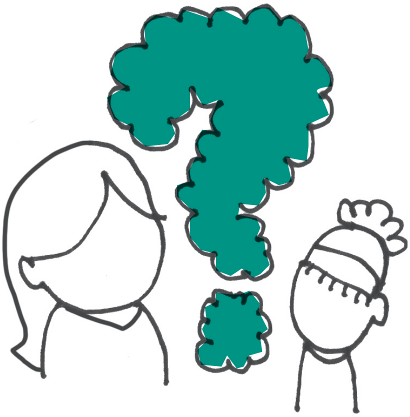
TOOLS

Flip chart, post-it notes, sharpies, research notes.

Method: How Might We Statements

The right question for meaningful solutions

A How Might We (HMW) statement is a problem statement that crystallizes customer needs in one concise, customer-focused and aspirational statement that can guide your team in developing solutions. A HMW statement can help your team re-frame customer needs from what you might have originally thought them to be to be – to what you discovered they actually are through learning from your customers. It can also help frame the scope of the opportunity you are tackling.



LET'S DO ONE

STEP 1: Pick one: From all your needfinding, identify a need or opportunity to address.

STEP 2: Write the opportunity/challenge/insight in HMW language in a way that is not too broad and gives your team direction, but is not too narrow. For example:

Too Narrow: How Might We play soothing music in ER rooms so patients are not stressed?

Just Right: How Might We reduce uncertainty patients feel in ER waiting rooms?

Too Big: How Might We improve ER facilities?

STEP 3: Test your HMW statements with a quick brainstorm. Can you easily generate 6-7 ideas in under 3 minutes? Are the solutions aspirational? If yes, this may be a good HMW to move forward with.

STEP 4: Make sure to write down and save your HMWs as they will drive your brainstorming.

TIPS & TRICKS

Focus your HMW statement on the people. What do you want the customer to be able to achieve as the end goal? Stay away from systems language (e.g. "improve the process").

A good HMW statement should inspire the team. Don't worry about the statement being too thorough – keep it short and connected to the heart of the problem.

Don't stop! It's better to start with a draft HMW than waiting to write a "perfect" one. You'll know quickly it isn't working if the brainstorming session stalls.

Test it: Does the HMW have a solution baked into it? If it does, rephrase it so it is solution-free. This will open your team up to exploring a wider landscape of solutions.

Invite customers to join you in crafting and choosing the HMW statement. If they can't join, share it with them to see if you are on the right track.

TIME

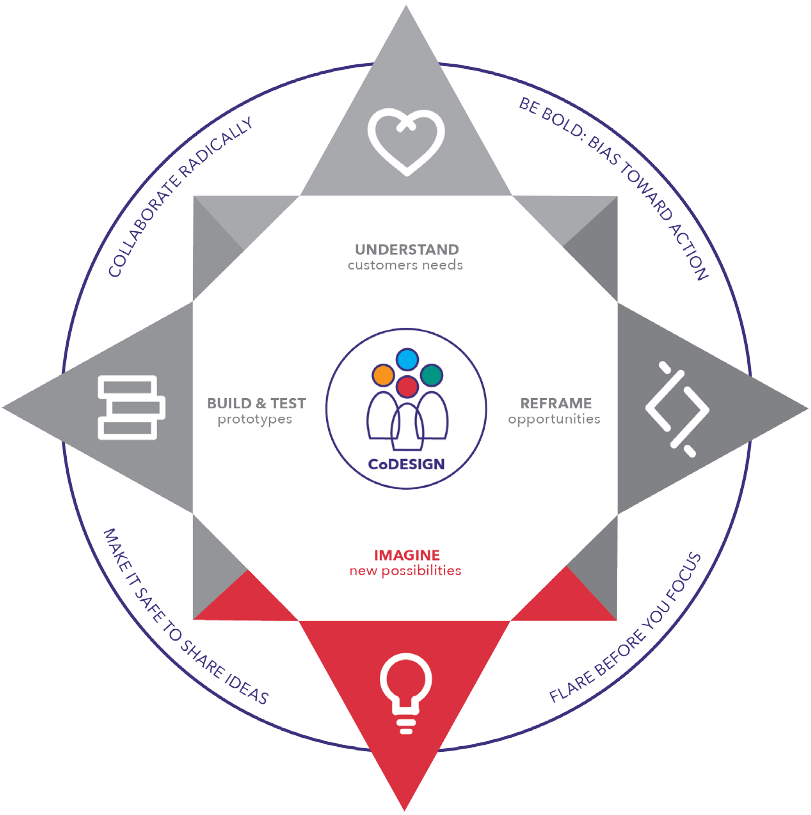
30-90 minutes

TEAM

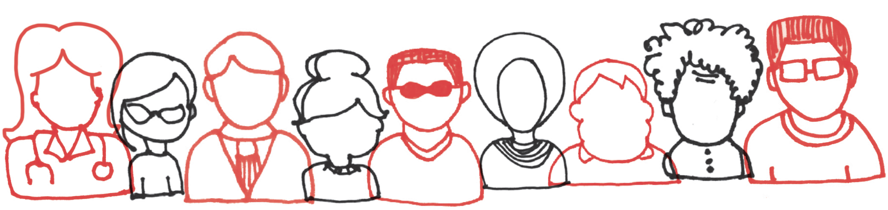
Your team. Customers. Stakeholders. Split into small groups of up to 6 people. 1 facilitator per group.

TOOLS

Flip chart, post-it, sharpies, research notes.



COLLABORATE RADICALLY
BE BOLD: BIAS TOWARD ACTION
UNDERSTAND
customers needs
BUILD & TEST
prototypes
CoDESIGN
REFRAME
opportunities
IMAGINE
new possibilities
MAKE IT SAFE TO SHARE IDEAS
FLARE BEFORE YOU FOCUS



IMAGINE new possibilities

This phase helps us:

> Generate many possible solutions to create a larger idea portfolio for further exploration

> Bring together diverse perspectives from multiple team members in a collaborative and structured way

> Encourage bold and inventive thinking to generate new and innovative solutions by drawing inspiration from other industries and disciplines

> Design outcomes that solve for customer experience, not just performance metrics

"When we were trying to reduce distractions nurses experienced while they gave medications to patients we wanted to be inspired by other industries. We decided to visit a commercial Flight School – an industry that has a very good safety record. In this field trip we learned about the "Sterile Cockpit" – the time between take-off and reaching 10,000 feet. During this time the cockpit was not allowed to be interrupted and focused only on safely taking the plane off and reaching 10,000 feet. This helped our team explore new ways to show when the nurse was busy and led to the development of non-interruption wear at KP through our KP MedRite project."

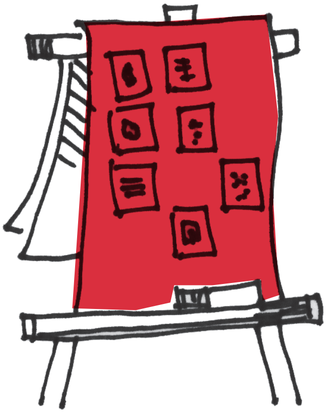
–Scott Heisler, Design Strategist

Method: Group Brainstorming

Go for quantity!

Brainstorming is a structured approach for group creativity to effectively generate lots of diverse ideas in a focused burst of time.

Brainstorming is also useful to align stakeholders, team members, and customers to collectively generate multiple solutions to the problems that affect us all.



LET'S DO ONE

STEP 1: Facilitator Prep: Find a room or space with a blank wall where you can post your HMWs, flip charts, and post-its. Move chairs if you have to.

STEP 2: Identify your best How Might We statement or statements and write each HMW on top of a flip chart on the wall.

STEP 3: Give everyone a post-its and a sharpie. Stand in a semi-circle facing the wall.

Review the rules of brainstorming:

1. **Defer judgment:** The most important rule! Remember, this is the stage when the team is in the generative Flare stage.
2. **Be visual:** Write or sketch each idea on a post-it, say it to the group, and put it on the wall.
3. **Build on ideas of others:** say, "To build on that idea…", put your idea next to theirs.
4. Take turns to speak- no side coversations.

STEP 4: Now set a timer for 7-10 minutes and brainstorm!

STEP 5: Have the team vote on ideas to choose the top 1-3 to prototype.

LET'S DO ONE

Time to think: To give your team some individual time to come up with ideas, you can start with 5 mintes of individual brainstorming, then jump into a group brainstorm.

Analogous thinking: Expand your thinking by getting inspiration from how other industries solve similar problems. How does the airline industry solve this? How would a kindergarten teacher solve this?

Constraints: If your team feels stuck, add a constraint. For example, what if we used no electronics to solve this? What if this happened on Mars? Sometimes even seemingly silly prompts can encourage creativity.

Choosing ideas: To select top ideas, try dot-voting. Another tool is to arrange ideas on a 2x2 grid (e.g. feasibility versus customer delight).

Remember Metrics That Matter: Now that you have specific ideas to prototype and test, find out from customers what metrics you should be tracking when testing these ideas that matter to them.

TIME

10-20 minutes
per How Might We

TEAM

Your team. Customers. Stakeholders.
Split into small groups of up to 6 people.
1 facilitator per group.

TOOLS

1 Post-it pad per
participant, sharpies,
flipcharts, timer.

Method: Storyboarding

Mini-comics for change

Storyboarding is a simple visual technique to communicate how a new idea for a program, service, experience, or product would play out and meet the needs of the customers.

Storyboards are extremely flexible tools for sharing. They are useful, for example, to help a team think through the steps and interactions a customer would experience with the new idea. They can also help align team members around one common vision of the new idea or help plan how the idea will be implemented.

LET'S DO ONE

STEP 1: Sketch out 8-10 boxes on an 11x17 sheet of paper or a flipchart.

STEP 2: In each box, sketch out your concept, step by step. Consider the customer interaction and experience at each stage and capture the different roles and activities of others (e.g. KP staff) at each step.

STEP 3: Consider breaking the story into phases. What does the initial interaction look like? What happens in the middle? What will be the last thing that the member experiences? Consider using the touchpoints from your Journey Map.

STEP 4: Storyboards are scripts: Once you've sketched out a storyboard you can try "body storming" and act out with the group each stage drawn in the storyboard to bring them to life. Assign roles and have some serious fun. You will also learn a lot about the idea by doing this.

TIPS & TRICKS

Everyone can draw: People are often scared of drawing; remind them that stick figures are fine. It's often helpful for the facilitator to draw something simple to break the ice.

Storyboarding can be a group or individual activity: Try having each member of your team draw their own storyboard to start. This can help explore multiple ways that a concept might take shape, and gives each individual the chance to reflect and think about an idea in greater detail before coming back together.

Post-it notes: You can use post-it notes to populate your storyboard – it can make it easier to experiment with different scenarios – and also assemble a story-board from different contributors.

TIME

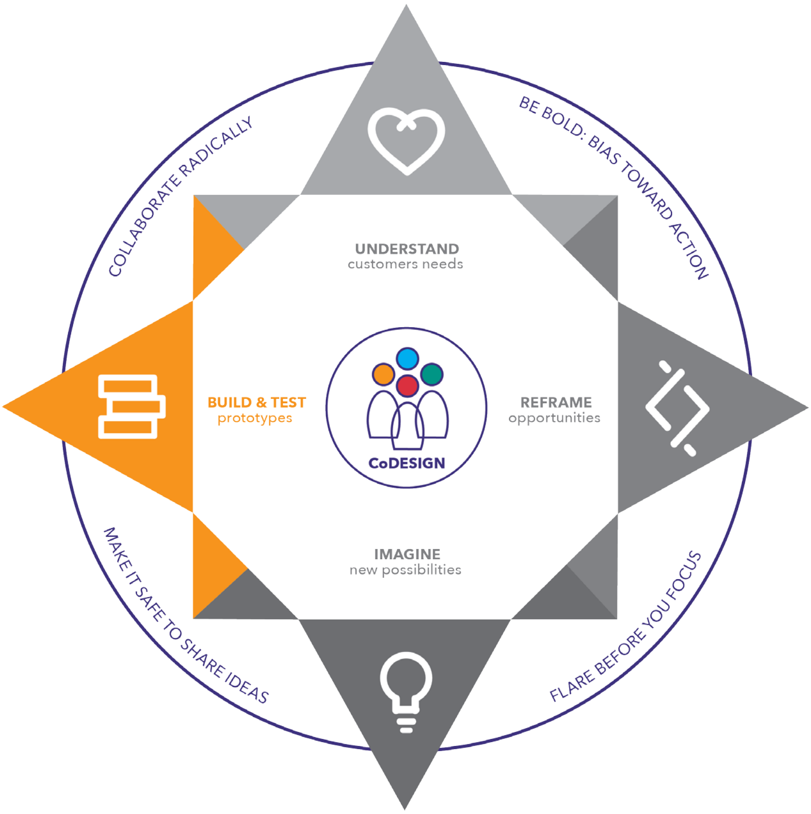
15-30 minutes

TEAM

Your team. Customers. Stakeholders.
Split into groups of up to 4 people.
1 facilitator per group.

TOOLS

11x17 paper, markers.


UNDERSTAND
customers needs
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IMAGINE
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BUILD & TEST
prototypes
CoDESIGN
COLLABORATE RADICALLY
BE BOLD: BIAS TOWARD ACTION
FLARE BEFORE YOU FOCUS
MAKE IT SAFE TO SHARE IDEAS

BUILD & TEST prototypes

This phase helps us:

> Challenge assumptions about new ideas through building simple prototypes we can quickly test with customers, rather than only talking about ideas around conference tables

> Bring conceptual ideas to life quickly and flesh out details that may not be apparent on a PowerPoint slide or a post-it note

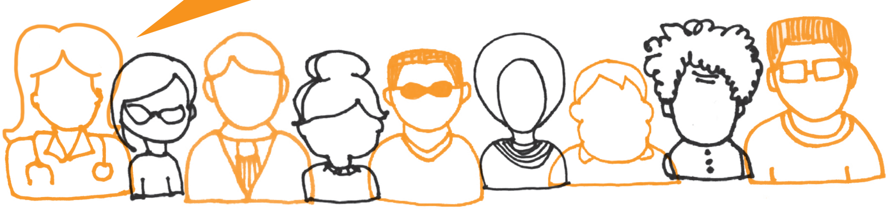
> Refine concepts rapidly and inexpensively through multiple iterations

> Test assumptions quickly and with few resources before launching pilots

> Field test new ideas with customers in the clinic or other real settings to get their feedback and reactions, and learn how they experience our prototypes

"Our team was building a resource list for caregivers to help them support their loved ones through the challenging transplant journey. We didn't have ready access to a designer, so we decided to start with basic content typed into a Word document. At first I was hesitant to show something so basic to our members, but it got us started. Our caregivers were immediately able to react to the content and gave us great insights quickly. We later engaged a designer to create something more engaging and professional as the final version, having more confidence we were on the right track."

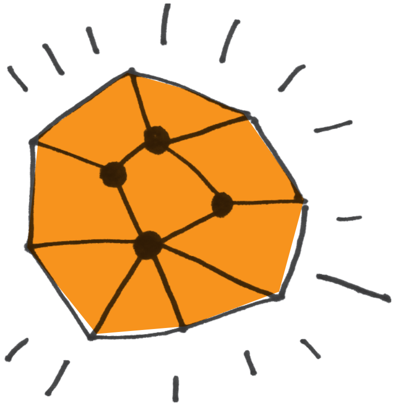
–Alice Ducey, Executive Consultant



Method: Rapid Prototyping

Decide by making

Rapid prototyping makes ideas tangible so you can refine and develop your concept. Learning rapidly and inexpensively through iteration is crucial to making the decisions required to get your idea ready for pilot testing and implementation – or to decide if its is worth pursuing at all.



Rapid prototyping uncovers assumptions and suggests answers about the form, function, and social interactions necessary to bring a solution to life.

LET'S DO ONE

STEP 1: Identify a concept: Pick an idea from brainstorming that you or your group would like to explore and bring to life.

Decide on the type of prototype: Want to make an object like a new stethoscope? Then use foam core or string. Want to try a new type of experience for a patient visit? Then re-arrange furniture, and room signage to prototype the experience. Want to create a new digital interface? Use sheets of paper for different screenshots, with buttons drawn in.

STEP 2: Share the prototypes: Have people share their prototypes with the group. The group asks open-ended questions to help shape the idea and grow it.

STEP 3: What other interactions or services might be important to the final solution? For example, a team prototyped a "celebratory dance party" for new mothers. Prototyping answered key questions about timing, and location of the event.

STEP 4: Identify key questions or assumptions revealed during prototyping.

TIPS & TRICKS

$5 dollars and 5 minutes: Prototyping is all about learning by doing – quickly. It is rough and rapid. $5 and 5 minutes is not about getting it 100% right, it's about getting it made.

> Use paper to draw the screens for an app or computer program.

> Create a new oven using cardboard and fake buttons with stickers.

> Re-arrange the room and draw a storyboard of a new way for a patient to get diagnosed.

Body storming: Skits are a great way to prototype services- and processes. Members of your team can play different "roles" and act out a service scenario. Body storming can prototype different interactions that might be important.

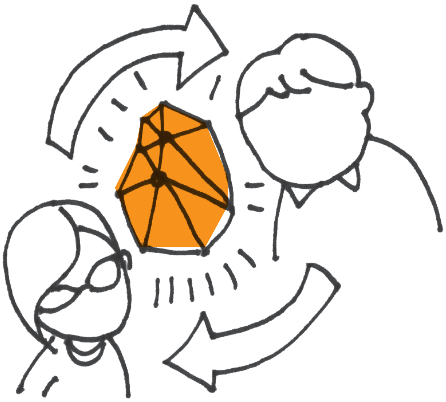
One of the goals of prototyping is to land on a solution that works. Another goal is to eliminate solutions that don't work - and eliminate them early. Create multiple different prototypes to explore different solutions.

TIME	TEAM	TOOLS
30-60min	Your team. Customers. Stakeholders. Split into small groups of up to 4 people per group. 1 facilitator per group.	Scissors, tape, cardboard, chairs, desks, computers, shelves, etc.

Method: Field Testing

Make it or break it!

Prototype testing is all about getting contextual feedback from customers and key stakeholders to generate new insights about your solution. Each new insight will help to improve your solution.



Prototype testing is essential to reduce bias and instead focuses on discovering evidence to validate a clear direction for decision-making. It also reinforces customer empathy while generating the inspiration needed to power implementation.

LET'S DO ONE

STEP 1: **Identify a prototype** or service design to get feedback on and recruit participants to test it.

STEP 2: **Getting real:** Consider where the prototype will be used or take place. Try to get as close to real life as possible. For example if your idea is a product meant for home use, arrange a home visit to test the prototype in a participant's home.

STEP 3: **Set the stage:** Inform your participants that you are exploring some new concepts. Emphasize you don't know yet if this is a good idea, and that you want their honest opinion.

STEP 4: **Do and tell:** Have your participant try the prototype and talk out loud as they experience it. Use your observation skills and look for what they, **SAY**, **THINK**, **FEEL**, and **DO**. Remember how someone uses and interacts with a prototype maybe different than what they say about it.

TIPS & TRICKS

Don't worry about high fidelity prototypes. People are more likely to share honest critique and feedback on less polished prototypes.

We all want to help someone use our ideas the way we know it's "supposed" to work. Don't intervene, don't over-explain, you want them to experience it as true to life as possible.

Don't oversell your solution: Avoid asking questions such as "Do you like it?"

Focus on open-ended questions:

"What parts spoke to you and which didn't?"

"What do you think is supposed to happen?" "What is the first thing that comes to mind when you look at this?"

"Show me how you would you use it?"

"How would you make this better?"

Giving people several options to choose from can help them be more open with providing critique. "Which one works better for you? Why?"

TIME

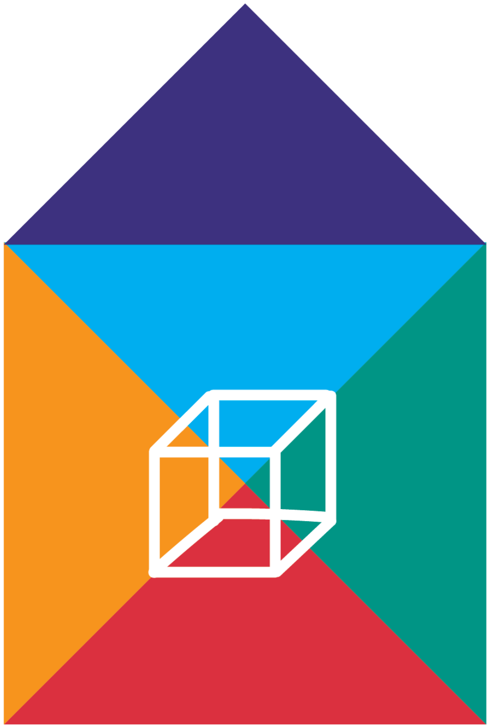
15-30 minutes

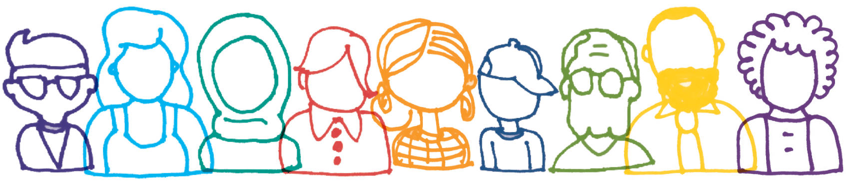
TEAM

2-3 people from your team: one lead tester, the other(s) to capture observations and quotes.

TOOLS

Prototype materials, notepad for recording feedback.





Introduction to Places

Our physical and emotional environments influence how we work. The spaces we work in can encourage ways of working that are more collaborative, creative and interdisciplinary – or limit them. Places bring People and Practices together in environments enabling teams to rapidly solve complex challenges and work on projects in new ways.

This section of the Pocket Guide offers some concrete suggestions on how you can create a space to support the practices and behaviors of human-centered design for yourself and your team, leveraging the resources and constraints that are available to you.

Read on to learn how to:

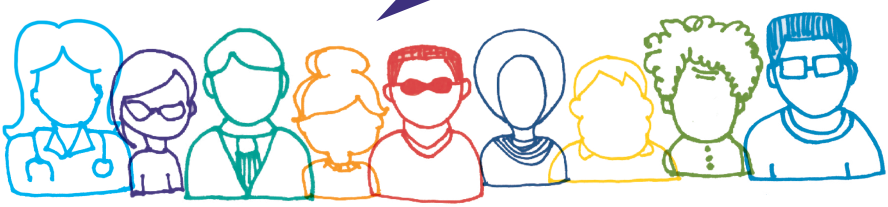
HACK YOUR SPACE: Modify your existing space to encourage new behaviors and increase your team's ability to collaborate and create together.

CREATE A POP-UP STUDIO: Use inexpensive and readily available materials to create an experimental or trial studio.

CREATE A FORMAL STUDIO: Establish a dedicated space that can support workshops, brainstorming, and prototyping and serve as a home base for project teams.

"A conference room is the old way of doing things. If you want people to work differently, you have to give them an environment that's different."

–Jennifer Lo, Managing Director
Improvement Support Team



Hack Your Space

Duration: A few hours – a few days

Make any existing space, such as a conference room or team work area, into a temporary studio space that sets the tone and supports the mindset of people working in it. Try these things to signal to participants that conventional meeting "rules" no longer apply, even if it is for just for the time they are in the studio.

THINGS TO TRY

1) Rearrange existing furniture (or use foam core boards) to create a space that encourages participants to work collaboratively. Think about a space that encourages meeting participants to stand up and write ideas on the wall spaces or flipcharts instead of sitting around a conference table.

2) Bring in flipcharts to put on the walls (and use foam core boards to create more wall space) to have a visual way to document insights from customers, ideas, and prototypes. Capture project work visually in a way that everyone in the space can see.

3) Post "Rules of Engagement" that encourage participants to embrace working differently, e.g., defer judgment, work visually.

4) Use the Method Cards in this guide to encourage teams to solve problems in a human-centered way.

TIP: BREAK AWAY FROM THE NORM

Be prepared to try new things and push people outside of their comfort zone. It can be fun to try new things and work differently. Encourage people to try new ideas and embrace if they don't work. Work visually by drawing out ideas instead of just writing or talking. Develop low fidelity prototypes to quickly test ideas.

Create a Pop-Up Studio

Duration: A few days – a few months

You don't need a dedicated space to set up a studio. Teams across Kaiser Permanente have developed low-cost solutions that support human-centered design project work in locations where permanent space is not always available. A project studio can support a project for a few days or a few months, depending on the project needs.

THINGS TO TRY

1) Create an ask for space. Connect with local leadership to make sure your project is aligned with facility/regional priorities. Aim for an unusual space: an old kitchen or unused storage area are often an easier ask then formal conference room space.

2) Think about licensed versus adjacent space. Some teams prefer to work on site, while others appreciate the distance of adjacent space.

3) To keep costs low, reuse surplus furniture and low cost items from Ikea or Amazon.

4) Set the space up with portable project boards made from foam core, where teams can save their synthesis, brainstorm, and storyboarding artifacts between working sessions.

5) Create a mix of different work areas to support different work streams such as brainstorming, synthesis, and prototyping.

6) Remove hierarchy by leaving badges and titles at the door. In a studio, all opinions are equally valuable.

TIP: USE EXISTING RESOURCES

Utilize the Resources section of this guide to access studio resource materials (such as the studio pitch deck to make an ask for a studio space, an inspirational video about studios at KP, and studio tool kit).

Formal Studio

Duration: A permanent resource

A growing number of teams at Kaiser Permanente are establishing studios in their national and regional offices and within medical centers. Having a more established studio enables your team to host multiple projects, serve as a collaboration space shared by mutiple teams, and a great resource for conducting workshops in human-centered design with people outside your team.

THINGS TO TRY

1) Reflect on learnings from pop-up studio experiments. What worked well for your team and what needs to be changed?

2) Space should be designed for flexibility; it should be easy to switch between different activities and projects.

3) Like a pop up studio, it is important that work being done in a formal space is aligned with facility/regional priorities.

4) Talk with facilities planning and leadership to explore what spaces might be available.

5) Think about projects you're working on and plan space accordingly.

   > Will you need space to host customers for CoDesign sessions?

   > Do you want to visualize your project work in a central space where it is easy to bring colleagues by for feedback and sharing?

6) Use learnings from other teams with permanent space. Ask what they like about the space and what they would change.

TIP: GET INSPIRED

Visit the Garfield Innovation Center in San Leandro – or a Regional or local studio that you might know of – to get inspired.

Many other companies have created design studios to support their work. Check out companies such as IBM, Citrix, Intuit and others for inspiration and ideas.

RULES OF ENGAGEMENT

Work visually: Less talking, more sketching – visualize every idea that you want to be heard

All opinions are equal: every post-it has the same weight

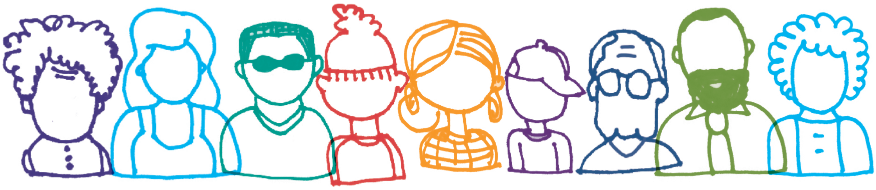
A safe zone: don't shoot down ideas – focus on generating more ideas

No cell phone zone: preserve the state of flow without interruptions

Build in the Team Culture and Team Norms into how you work in the studios

KEY STUDIO INGREDIENTS

These are needed for any studio space: Post-its, sharpies, flip charts, foam core boards, tape, paper, moveable seating, scissors. For more information about studio supplies please visit: http://bit.ly/HCDatKP



Resources

Latest versions of this guide and additional resources are available on the internal wiki to KP staff at http://bit.ly/HCDatKP

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ACKNOWLEDGMENTS:

We thank the many staff and leaders across KP who played a significant role in developing the shared approach to Human-Centered Design @KP that we present in this pocket guide. We are also especially appreciative of the IBM Design team who inspired us after our visit to their Studio in Austin, Texas. IBM is the originator of the People + Places + Practices = Outcomes formula. We are grateful for their encouragement, generous sharing and valuable insights on spreading human-centered design across a large complex organization. For more information on their approach, visit www.ibm.com/design/

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