Ardent

DESIGN THINKING:

A Field Guide for Learning and Development Professionals

Why a Field Guide to Design Thinking in L&D?

As more organizations require learning solutions that consider a range of perspectives to better meet target audience needs, Design Thinking has emerged as a powerful tool for Learning & Development (L&D) professionals.

But what is Design Thinking? Both a method and a mindset used to solve complex problems, Design Thinking is a human-centric, team-based approach to exploring ideal future states and designing innovative learning solutions that can feasibly meet the learners' needs and desires. As L&D professionals, we have the power and the responsibility to improve the design of our learning experiences, and Design Thinking is a tool in our kit that can help us do just that. It also raises the bar if everybody's equipped with a minimum language of Design Thinking.

In this Field Guide, we will:

- Discuss what sets Design Thinking apart in the L&D world

- Review the basic Design Thinking framework

- Describe how to run a successful Design Thinking workshop

Chapter One

What Sets Design Thinking Apart in the L&D World?

Have you ever wondered why some learning solutions inspire and serve us, while others confuse and frustrate us? The strength or weakness of the solution likely comes down to an incredibly powerful, but not immediately obvious component: Its design.

As design critic and author Alice Rawsthorn wrote, "Design is one of the most powerful forces in our lives, whether or not we are aware of it, and can also be inspiring, empowering, and enlightening."

Although it's called "Design Thinking," the practice is not an exclusive property of designers. Anyone can use Design Thinking to aid in extracting, teaching, learning, and applying human-centered insights as a foundation for creative problem-solving.

In the L&D world, Design Thinking is set apart by the:

- **Focus:** Rather than a content first approach, Design Thinking seeks to know who will be using the solution, how they will be using it, and why they will be using it—why and how before the content.

- **Participants:** The process involves learners, teams, and the interactions between them.

- **Goal:** The goal is to provide learner-centric solutions while embracing change.

- **Key components:** The products usually include Learner Journeys or Learner Experience Maps, Learner Personas, Problem Statements, and "How Might We?" questions.

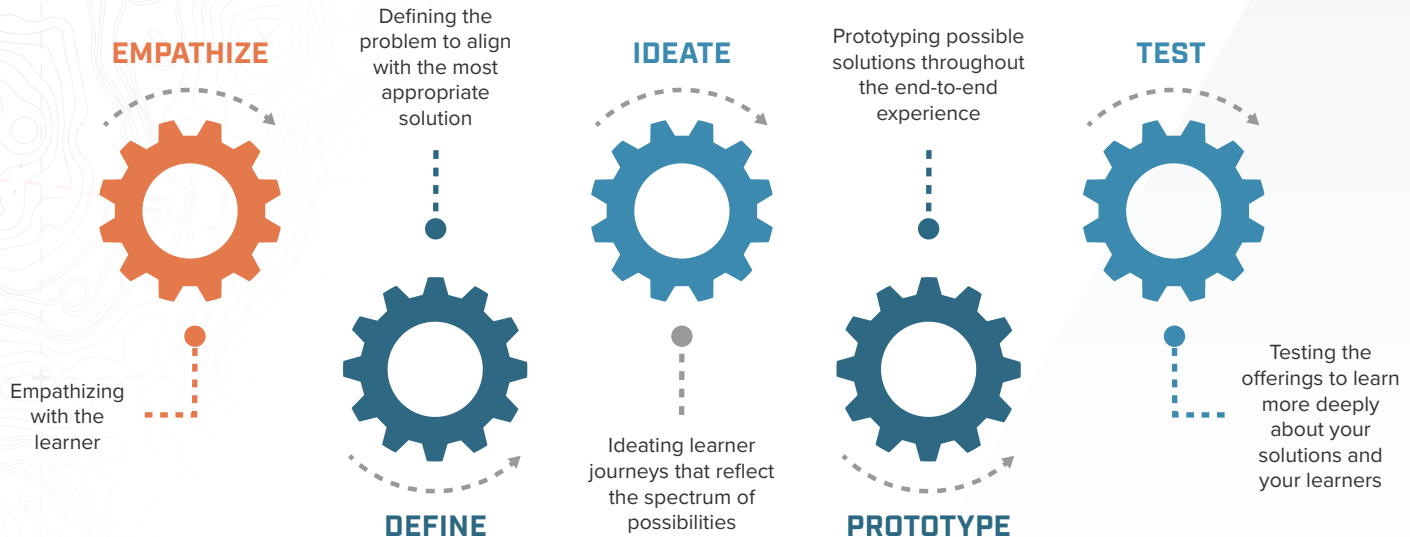**With Design Thinking, the outcome is bottom-up, personal, and desirable.**

During the development, this approach also provides guidelines to re-frame the problem in human-centric ways, encourage diverse ideas through brainstorming, and apply a test-and-learn model that tolerates failure.

As with any approach, we need to be selective about the type of projects suitable for Design Thinking. We should leverage Design Thinking when there's a need to create learner-centric solutions that don't exist yet or without many parameters in place.

Chapter Two

Design Thinking Framework

As all phases of Design Thinking evolve together and complement each other, it is better to view them as flexible spaces rather than linear steps.

EMPATHIZE

Defining the problem to align with the most appropriate solution

IDEATE

Prototyping possible solutions throughout the end-to-end experience

TEST

Empathizing with the learner

Ideating learner journeys that reflect the spectrum of possibilities

Testing the offerings to learn more deeply about your solutions and your learners

DEFINE

PROTOTYPE

EMPATHIZE

Industrial designer and design educator Paul Beckett succinctly summed up the foundational role that empathy plays in the Design Thinking process, writing, "Great designers are great empathizers. It's what separates a design that has soul from one that's simply well-realized."

Here are some tips that can help you become a better empathizer:

- **Observe** learners in their environment. Notice their verbal and non-verbal language, the patterns, the conflicts, the interactions, and what's missing.
- **Identify** the extreme cases of learning needs and desires so we can "solve for one, extend to many."
- **Interview** learners to dig deeper and know more about their situations. Pay attention not only to what they say but also to the silence, the pauses, and the conflicts between their words and actions.
- **Live** the real-world experience of the learners. Be them and identify their underlying needs.

If you are looking for alternative ways to empathize, you can try the Photo Journal or Collage methods. These activities use visual techniques such as taking pictures of anything relevant to the topic or creating a collage to share their thoughts, involving learners from the onset.

Once you have gathered the insights, you can start sharing them with stakeholders through the Learner Personas or Gallery Walk methods. Visually putting all the information together helps the design team to connect the dots and discover the problems or the weak points that may not be obvious. These visual activities also invite the team to interact and challenge individual takeaways so the team can reach a shared interpretation of the learners.

DEFINE

Once you have a picture of who the learners are, it's time to think about the problems you need to solve and define the goals to work towards. Using Problem Statements can help the team converge and stay focused on the topics. Although there are a few ways to structure problem statements, the rule of thumb is to answer the 5Ws.

See the example Problem Statement below.

A new hire feels overwhelmed daily,

| WHO | WHAT | WHEN |

because there are too many conflicting priorities at work,

WHAT & WHERE

which lead to negative feelings and emotions about their work and the work environment.

WHY

1 **Who** does the problem affect?

2 **What** is the issue?

3 **When** does the issue occur?

4 **Where** does the issue occur?

5 **Why** is it important that we fix the problem?

After identifying the problem areas, you can reframe your problem statements as How Might We? (HMW) questions. By doing this, you are turning those challenges into design opportunities. The HMW format suggests a variety of possible solutions. A well-framed HMW question doesn't point to a particular solution but offers the perfect frame for creative thinking. Make sure your HMW question isn't too broad or too narrow. A good one should give you direction to brainstorm and enough room to explore wild ideas.

You can write multiple HMW questions for one problem statement. Let's translate the problem statement into different HMW questions.

How Might We...

help new hires understand that having more time management and prioritization skills can help them feel less stressed?

How Might We...

help new hires recognize symptoms of low emotional intelligence, and identify how low emotional intelligence negatively influences themselves and others?

How Might We...

help new hires reframe their negative emotions/ reactions regarding work and channel them into more positive ones?

How Might We...

help new hires use people management and communication skills to respond positively to their stakeholders and their emotions?

IDEATE

Once the goals are clear, the question becomes how to brainstorm creative ideas. At this stage, it is important to diverge as much as our creativity and imagination can take us. The purpose isn't to agree on a perfect, practical, and immediately actionable idea, but rather to come up with lots of ideas through collaboration and openness to wild solutions. Divergent thinking aims to get beyond easy answers and find options that might be truly innovative. Although extreme options are rarely chosen, they can be stepping stones to more-practical solutions.

Here are some tips for a successful ideation session:

- **Encourage wild ideas and go for quantity.** Consider an approach called the Seven Ways—identifying at least seven options when brainstorming possible solutions. This can give the team a creative leap and lots of ideas to choose from.
- **Build on the ideas of others.** Choose one or a few ideas that resonate the most with you and build on them. This will open up conversations and thought processes, which eventually lead to potential solutions.
- **Stay focused on the topic.** Diverge with a clear goal in mind or the team can get lost in a sea of irrelevant ideas that can't be used to solve the problem.
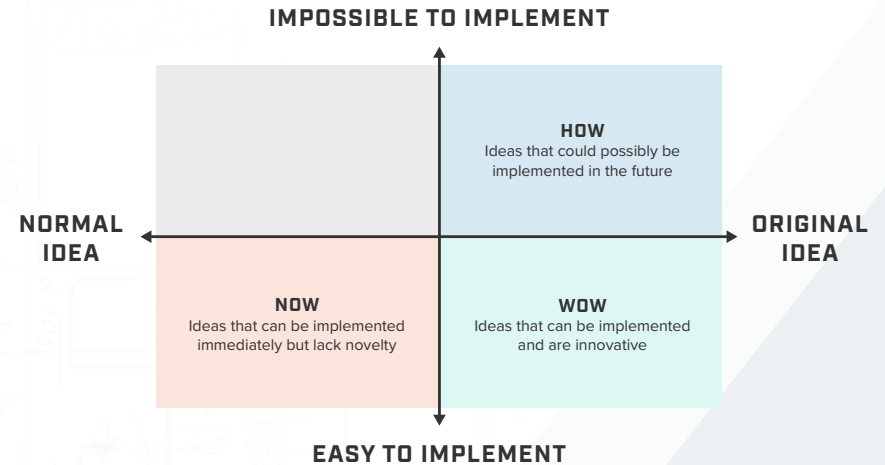
At the end of the ideation stage, converge and choose a few ideas to focus on. Not only will this avoid overwhelming everyone, but also align the team on the next steps. Do a quick and simple activity, such as anonymous voting, and use the results to decide the potential solutions.

Prioritization Matrix

HIGH

IMPACT

Big Bets

Stars

Lower Priority

Quick Hits

LOW — — — — HIGH
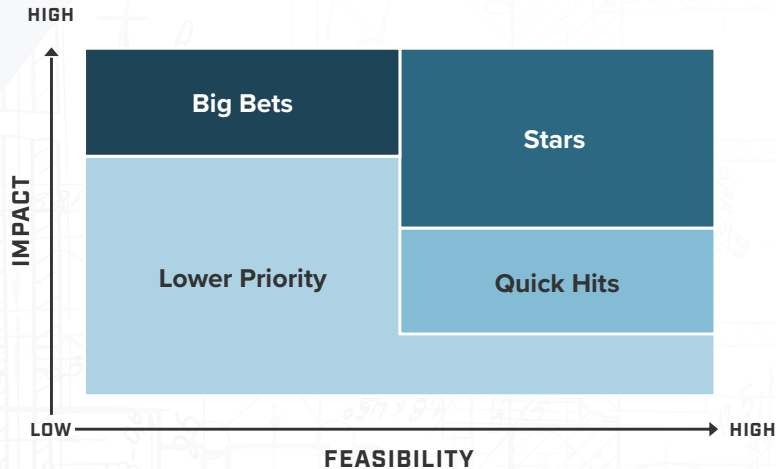
FEASIBILITY

You can use the Prioritization Matrix to group the ideas into various categories depending on their feasibility and impact. Afterward, the team can agree on short-term vs. long-term ideas to meet learners' needs, the project requirements, resources, and its timeline.

Now How Wow Matrix

IMPOSSIBLE TO IMPLEMENT

NORMAL IDEA

ORIGINAL IDEA

HOW
Ideas that could possibly be implemented in the future

NOW
Ideas that can be implemented immediately but lack novelty

WOW
Ideas that can be implemented and are innovative

EASY TO IMPLEMENT

Similarly, you can leverage the Now Wow How Matrix to reach the group consensus on which idea to implement, when, and how.

PROTOTYPE

In the book [HBR's 10 Must Reads on Design Thinking](#), Tim Brown wrote that prototyping is like "rehearsing new futures." By creating low-cost, flexible, and incomplete prototypes, we express our ideas vividly and invite stakeholder interactions. It saves us time, effort, and investment, yet still proves itself useful for generating feedback and evolving a solution. The goal of prototyping isn't to share a complete solution. It is to learn about the strengths and weaknesses of the idea so that we can decide to take on a new direction or alter the current one.

Here are some tips for rapid prototyping:

- **Identify or create opportunities for prototyping.** Imagine the end-to-end experience of the learning solution you're designing for. Pay attention to significant moments of delight we could present to the learners at any touchpoint during their learning journey.

- **Visualize the learning journey.** Sketch the learning journeys out and bring them back to the learners or stakeholders for validation and feedback. You can try some popular design collaboration tools such as Miro, Mural, Figma, Padlet, InVision, or Lucidchart to draw out the entire journey with learning events and different touchpoints.

- **Create storyboards.** Remember the significant moments you've identified in the learning journey earlier? Choose one or a few and create a storyboard or simple mockups for them using quick design tools like Canva. The key is to visualize and get into more details so you can understand what it takes to implement the solutions. This will help you focus on the moments of impact and decide the next steps.

- **Build a minimum viable product (MVP).** Once you've gained more confidence in the solution and its components, start developing your MVP for certain learning assets. As the most basic version of the learning solution with enough content and features, MVPs can be used to invite stakeholders to experience your ideas and give you meaningful feedback before designing for the bigger group or taking on the full-scope solution.

TEST

Testing your learning solutions means gaining validation and buy-ins along the way. That's because we're getting feedback and inputs from the people we're designing for—our learners and their stakeholders.

Here are some tips for an effective iteration process:

- **Understand that you won't get it right the first time.** Testing and iterating allow us to explore and learn from our failures yet ultimately arrive at a desirable solution with a high adoption rate.

- **Measure the impact of learning and learner satisfaction when testing.** When designing and rolling out the MVPs, we need to incorporate some mechanisms to collect data and encourage learners to share their feedback with us. This will allow the design team to smartly prioritize which concepts and solutions we're going to put our attention and effort into for future implementation. Measuring the results and gathering feedback can be as simple as post-event surveys, learners' action plans, or more elaborate learning dashboards. The key is to know what data we are looking for when we decide on the feedback channels. At the same time, we also need to understand and know how to read the data we gather for actionable insights.

- **Test with a small group of learners.** We test our solutions because it allows us to keep discovering. Instead of betting that the learning program we design is going to be a hit, we share it with a small group of learners and let them be our guides. Consider rolling it out as a beta to a focus group, gathering their feedback and any other inputs to iterate, and improving the solutions before implementing it to an entire audience.

- **Iterate.** By continually iterating, refining, and improving our solution, we'll have more insights and be able to arrive more quickly at successful solutions.

This process of testing and iterating allows us to not only collaborate with our learners, but also deploy learning solutions to them just in time to meet business requirements and the learner's needs while excelling the quality.

Chapter Three

How to Run a Successful Design Thinking Workshop

A successful design thinking workshop might hold different meanings for different groups of audiences. Each of us can also run our workshops in different ways—and that's the beauty of diversity. Regardless of how we run the workshops and who the audiences are, running a Design Thinking session in the L&D world usually involves three phases: preparation, facilitation, and post-workshop.

PREPARATION

- Identify and consider key stakeholders for a successful workshop.

- Ensure you have a good mix of L&D and business stakeholders in the room so they can bring a diversity of perspectives and inputs.

- Understand your stakeholders' level of comfort and familiarity with Design Thinking processes. You might need to adjust some of the steps or simplify your approaches to make them suitable for the group and time constraints.

- For the best outcomes, invite no more than 10-12 people.

- Do your homework and collect as much information as you can about the topic, what's already available, what are the risks and barriers, etc.

- Do preliminary research about your personas and verify with those closest to the learners if you don't have access to them.

- Decide which tool you want to use for live collaboration and how to capture the inputs.

- Develop your presentation and the materials needed.

FACILITATION – A WORKSHOP CHECKLIST

Keep these tips in mind while running a Design Thinking workshop.

Empathize (Learner Personas):

☐ Ensure you address positive and negative behaviors in your learner personas.

☐ Limit the number of personas you create.

☐ Keep an eye on the time and don't go too deep, you can always come back to a persona after the workshop.

☐ Don't create a persona based on someone in the room.

☐ Don't let stereotypes take over.

Define (Problem statement and HMW questions):

☐ Take the time to properly define the problems or challenges that are relevant to your learners.

☐ Statements need to be broad enough for creative freedom yet narrow enough to be manageable and provide direction.

☐ They need to be human-centered.

☐ Use authentic statements.

☐ Always tie them back to your personas.

☐ Use the 5Ws.

Ideate (Learner Journey):

☐ Infuse industry trends and learning and performance models.

☐ Don't over-manage the process; encourage wild ideas.

☐ Have learner personas visible to the group.

☐ Brainstorm ideas based on your "how might we" questions.

☐ Use stickers to categorize and prioritize ideas.

☐ Have fun!

POST-WORKSHOP

• Be open to the non-linear nature of the Design Thinking process—continuously build and expand on the insights.

• Move beyond ideas—working prototypes and testing are key measures of success.

• Master the concept of MVP.

• Embrace changes—check in with the team and adjust.

• Confirm personas, conduct learner testing, and keep iterating.

Chapter Four

Beyond Design Thinking

Although the power of design is real and increasingly important, Design Thinking is not a panacea or an elixir that works magically for all learning projects. Here are some thoughts to consider about the limitations of this approach.

DON'T USE DESIGN THINKING ALONE

Design Thinking doesn't replace other forms of analysis, planning, and strategy, but complements them for better and more holistic results. It must be integrated with other skills and capabilities to build a solid foundation for innovation. As no single approach can achieve outstanding outcomes in this ever-increasingly complex world, each organization needs to have a new generation of cross-functional teams of design thinkers flexibly blending the spheres of experience design, technology, and business. Instead of having separate conversations, now we can have integrated ones.

KNOW THE BOUNDARIES OF DESIGN THINKING

Use of Design Thinking varies by industry, function, the level of design awareness of the co-creators, and the needs and requirements of the projects. In some cases, it's possible to go too far and overinvest in design, which makes it misaligned with the business objectives.

Design Thinking can also become risky when we explore a problem statement that is too broad or poorly defined. It's dangerous to diverge without converging. Do not lose sight of the bigger picture when following the design activities.

KNOW WHEN TO STOP

Design Thinking usually involves building a personal connection with the users. However, to those who are used to being rational and objective, the process can become too subjective and overly personal. Although we want to understand our learners, too much emotional connection without a focus can feel uncomfortably emotive and sometimes overwhelming to the design team and the business.

In some other cases, goal-oriented people may find divergent thinking unnecessarily ambiguous. Leaders and designers need to help them overcome their insecurities and worries. The open-endedness of Design Thinking is a way of stretching for solutions, not a lack of direction.

Like any powerful tool, Design Thinking comes with a duty to use it responsibly.

Looking Ahead

Creating learning experiences doesn't stop with the learning designers or the L&D team, especially in this new world of work. It is a joint effort rooted in the organizational culture. By creating and supporting a design-driven culture, we invite innovation and opportunities into our doors.

In a podcast about the power of Design Thinking, two McKinsey leaders, Jennifer Kilian and Hugo Sarrazin, shared that a design-driven culture becomes more like a learning-driven culture. Design is all about learning and endless possibilities. Every interaction is an opportunity to learn and explore something. When you design without bias, judgment, or assumptions, you learn something new about yourself, the stakeholders, and other team members.

If we all approach and reframe the problem differently, we create more mutual wins rather than being in constant negotiation.

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ACCELERATING BUSINESS
RESULTS THROUGH LEARNING