

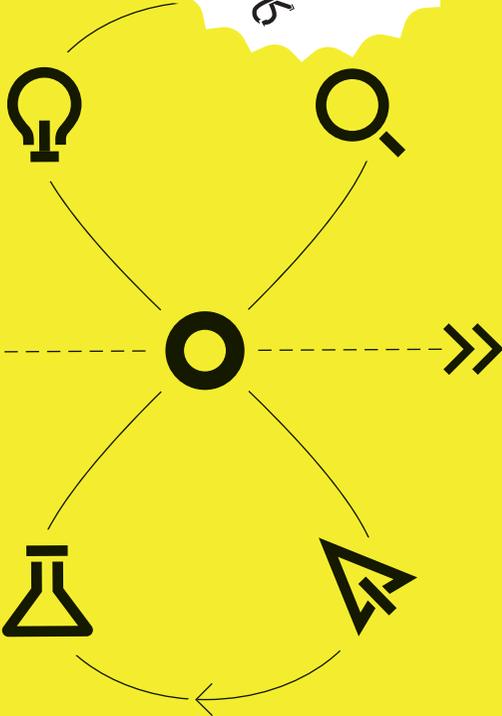
NEW TOOLS, SKILLS AND MINDSET  
FOR STRATEGY AND INNOVATION

DESIGN A

> **BETTER  
BUSINESS**

Written by Patrick van der Pijl, Justin Lokitz, and Lisa Kay Solomon  
Designed by Erik van der Pluijm & Maarten van Lieshout

INCLUDING  
PERSONAL INSIGHTS  
AND EXPERIENCES OF  
**30 DESIGNERS**  
AND THOUGHT LEADERS



WILEY

**DESIGN A  
BETTER BUSINESS**



# **DESIGN A BETTER BUSINESS**

NEW TOOLS, SKILLS, AND MINDSET FOR STRATEGY AND INNOVATION

Written by Patrick van der Pijl, Justin Lokitz, and Lisa Kay Solomon

Designed by Maarten van Lieshout and Erik van der Pluijm

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Cover design:

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Does this page make you feel uncertain or freak you out?  YES  NO

# HOW TO

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# USE THIS BOOK

FILLED WITH **PERSONAL STORIES**  
**AND EXPERIENCES** FROM **29**  
**DESIGN PRACTITIONERS** AND  
THOUGHT LEADERS SUCH AS...

STEVE BLANK  
SERIAL ENTREPRENEUR,  
AUTHOR, LECTURER  
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DOROTHY HILL  
VP OF STRATEGY, ING BANK  
P63

ROB FITZPATRICK  
AUTHOR, *THE MOM TEST*  
P89



## TOOL ICON LEGEND



**PERSONAL**  
This tool requires personality.



**TANGIBLE**  
This tool helps you build something.



**GENERATE OPTIONS**  
This tool helps you to create options.



**CREATE FOCUS**  
This tool helps you to decide and select.



**NORMAL SESSION**  
Normal work session.



**PRESSURE COOKER**  
High-intensity session.



**TEAM SIZE**  
Small or large team sizes.



**REVISIT**  
How often do you need to revisit this?

We've designed this book with you in mind! Unlike most books, this one can be read in several ways.

For one, you can read this cover to cover. The chapters build on each other. You can also scan for things that interest you, like new tools and skills. Additionally, we've included fast passes in this chapter (page 22) in case there is something specific you want to learn about right now.

**START  
READING!** 

**UNCERTAINTY:  
YOUR SECRET  
WEAPON**

The world around you – and your business – is filled with uncertainty. But within that uncertainty exist innumerable opportunities to design (or redesign) game-changing businesses. These opportunities are there for the taking, if you know how to look for them.

The world has changed. Not only are consumer habits, technologies, and other trends uprooting once-thriving businesses, entire markets are shifting and emerging out of the uncertainty and unpredictable nature of today's network economy. Interestingly (and infuriatingly to some), many of the companies leading the charge – and the change – did not exist two decades ago. It's not that these new players are just lucky or employ smarter, more capable people. So, how is it that they've found gold in some of the most unlikely places? In a word: design.

Design is fundamentally about enhancing the way you look at the world. It's a learnable, repeatable, disciplined process that anyone can use to create unique and qualified value. Design is not about throwing away the processes and tools you have. In fact, quite the opposite is true. Just as design has enabled countless upstarts to create new business models and markets, design will also help you decide when to use what tools in order to learn something new, persuade others to take a different course, and at the end of the day, make better (business) decisions.

Most of all, design is about creating the conditions by which businesses thrive, grow, and evolve in the face of uncertainty and change. As such, better businesses are ones that approach problems in a new, systematic way, focusing more

on doing rather than on planning and prediction. Better businesses marry design and strategy to harness opportunity in order to drive growth and change in a world that is uncertain and unpredictable.

This book will provide you with new tools, skills, and a mindset to harness opportunities born of uncertainty in order to design a better business. We've included tons of real-world examples of people who have mastered the fundamentals of design, as well as case studies of companies that have created change using design as the underlying foundation for decision making. And, just as design is a repeatable process, this book is meant not only to guide you on your design journey, but also to provide an ongoing reference to help you scale the design beyond one project or product to an entire company. ■

---

**YOU'VE GOT  
EVERYTHING TO GAIN**

---



# BECOME A DESIGNER



## WHAT'S ALL THIS (DESIGN) BUZZ ABOUT

Design is quickly becoming one of those words like “innovation.” It has different meanings to different people. It can be a noun, an adjective, and a verb. Design is ultimately an empowering approach of looking at the world and igniting new possibilities to make it better.

Design is both a process and a mindset. It's an intentional set of practices to unlock new, sustainable value from change and uncertainty. It allows individuals and organizations to be more flexible and resilient in the face of constant change. Unfortunately, the flip-

side of design is where we often find ourselves: scrambling when unforeseen change happens to us.

### WITH GREAT POWER . . .

The good news is that you are already a designer, at least some of the time. Every time you intentionally develop strategy or make a decision based on insight, you are acting as a designer. The not-so-good news is that many of the tools that you have probably been using to help make those decisions are likely not as useful as they once were, at least not on their own. So, what do designers do and what tools do they use that help them make better decisions?

### ITERATION

The key to design – and design tools – is that it is an **iterative** process by which designers, like you, start with a point of view, go out and observe the world to inform that point of view, create options that may address the opportunities you see, validate those options, and execute the ones that best address the opportunities. Most important, designers never focus on simply scaling the execution of the chosen option. Design is continuous and iterative; it's built to deal with ambiguity and change in a long-term way. ■

---

**DESIGN IS A DISCIPLINED APPROACH TO SEARCHING,  
IDENTIFYING, AND CAPTURING VALUE.**

# DESIGNER: A REBEL WITH A CAUSE

## THE 7 ESSENTIAL SKILLS

### IT ALL STARTS WITH THE CUSTOMER.

Observing customers to understand them will give you fresh insights into their needs. You must ask the right questions to get the answers you seek.

### THINK AND WORK VISUALLY!

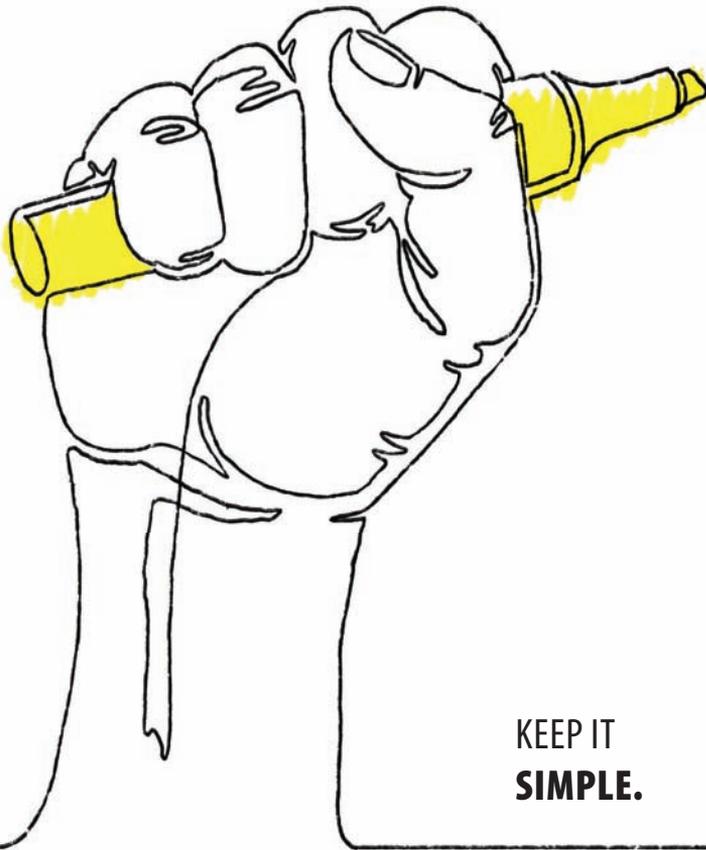
Working visually helps you to see the bigger picture, gain clarity on complex topics, create a visual anchor for your strategic conversations, and engage with your audience.

### DON'T FLY SOLO. YOU ARE NOT SMARTER THAN EVERYONE ELSE.

Gather different insights by working together. Connecting the brains in the room and in your market will enable you to uncover hidden opportunities.

### TELL STORIES AND SHARE THE EXPERIENCE.

Stories have a clear beginning and end, and most likely they have heroes your audience can connect with. Cool stories stick. Cool stories will be told by others. Cool stories spread.



**KEEP IT  
SIMPLE.**

Just start. Don't try to build the final product. Don't add features that don't solve real problems.

**SET UP SMALL  
EXPERIMENTS AND  
LEARN SHIT.**

Every little iteration and trial will net tons of useful new insights – things you wouldn't have learned if you just started building. Reality is different than what you assume.

**EMBRACE UNCERTAINTY.  
IT'S CANDY FOR  
THE BRAIN.**

Except for change, there is no such thing as certainty in business. Accept this and harness opportunities from uncertainty.

# DESIGN A BETTER

## CONNECTING INNOVATION, BUSINESS, AND STRATEGY

So, now you're a designer who's been imbued with the goal of designing a better business. What does a better business look like? And, how would one go about designing a better business?

Many existing, established businesses, especially non-startup businesses, focus solely on getting products to market while reducing costs and increasing margins. In these businesses, strategy is executed in a linear way: prepare; execute. What's often missing in this story is the customer on the other side of the transaction, as well as the person designing and developing products and services to satisfy some need for the customer.



**POINT OF VIEW** P46

Designers, on the other hand, are always thinking about the customer. They approach people and problems from a particular perspective, one informed by design-specific tools like ideation, prototyping, and validation. They use human-centered tools, skills, and a mindset to search for, design, and execute new value propositions and business models based on what they've learned. Designers do this continually, iterating constantly to uncover opportunities within the fog of uncertainty.

# BUSINESS

In this book, you'll find the designer's journey represented in a new way. Your point of view is at the center of the design process, which is always influenced and informed through understanding, ideation, prototyping, and validation. This process is iterative and cyclical.

So, what's a better business? A better business is one that puts the person at the center and connects design tools, practices, and processes.

To do this you must employ a design rigor – using your new tools, skills, and mindset – to guide business decisions and outcomes rather than solely driving day-to-day (business as usual) execution.

In doing so, your options for the future will become much clearer; as a designer, you will unequivocally begin to see opportunities within the fog of uncertainty. >>



**UNDERSTAND** P82



**IDEATE** P124



**PROTOTYPE** P152



**VALIDATE** P180

There's a continuous search for new customers, value propositions, and business models – with business execution and scale. As a designer, it's your job to make this connection. It's your job to consider and test new options for business sustainability and growth (by design). It's your job to consider the person you're designing for, which will inform your own unique point of view.

# THE DOUBLE LOOP

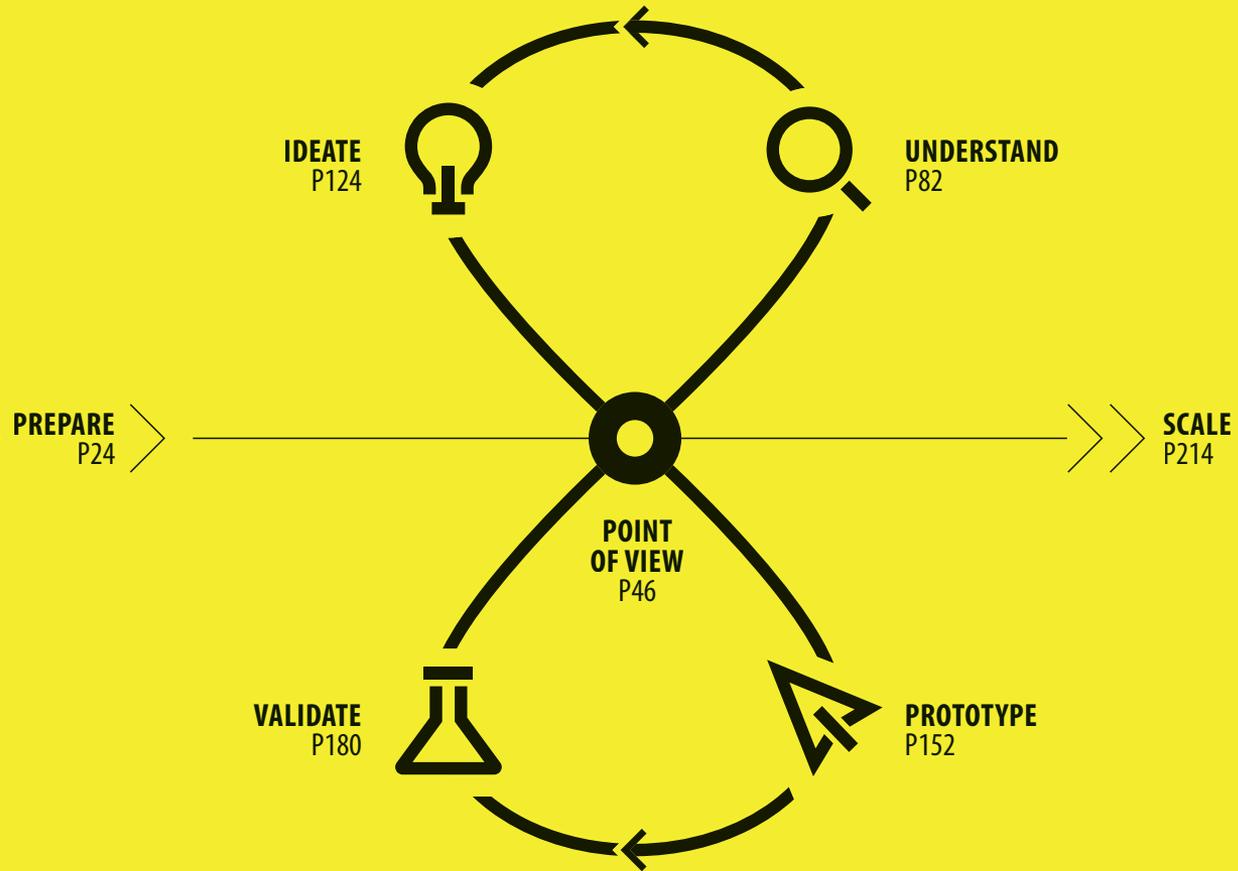
## A DESIGN JOURNEY

The double loop is founded on a simple observation: every project, product, company, change, or idea starts with a point of view. It might be based on fact. It might be based on assumptions. Whatever your point of view, using it to create lasting change requires work and a movement toward the goal line.

The double loop takes your point of view into account, while adding rigor and continuity to the design process. This means that your point of view is always informed by understanding and that that understanding will spark new ideas, further enhancing your point of view. These ideas are prototyped and validated to test and measure their effectiveness. This, in turn, further informs your point of view and enables you to execute your ideas successfully.



Every design journey also has a beginning and . . . a goal. In the case of this design journey, the beginning starts with preparation, at the left of the design loop. Preparing yourself, your team, your environment, and the tools you'll use is essential for your successful journey. At the right of the design loop is the goal: scale. In this book, scale refers to two things. First, we talk about scaling the execution of your idea or change; this begins with your point of view. Second, we talk about scaling the design process. This is, after all, a book about designing better businesses. Design is at the core. And it is design that is meant to scale. ■



# THE DOUBLE LOOP LANDSCAPE

## POINT OF VIEW P46

Design is human. The journey you take will help to inform your point of view going forward.

## UNDERSTAND P82

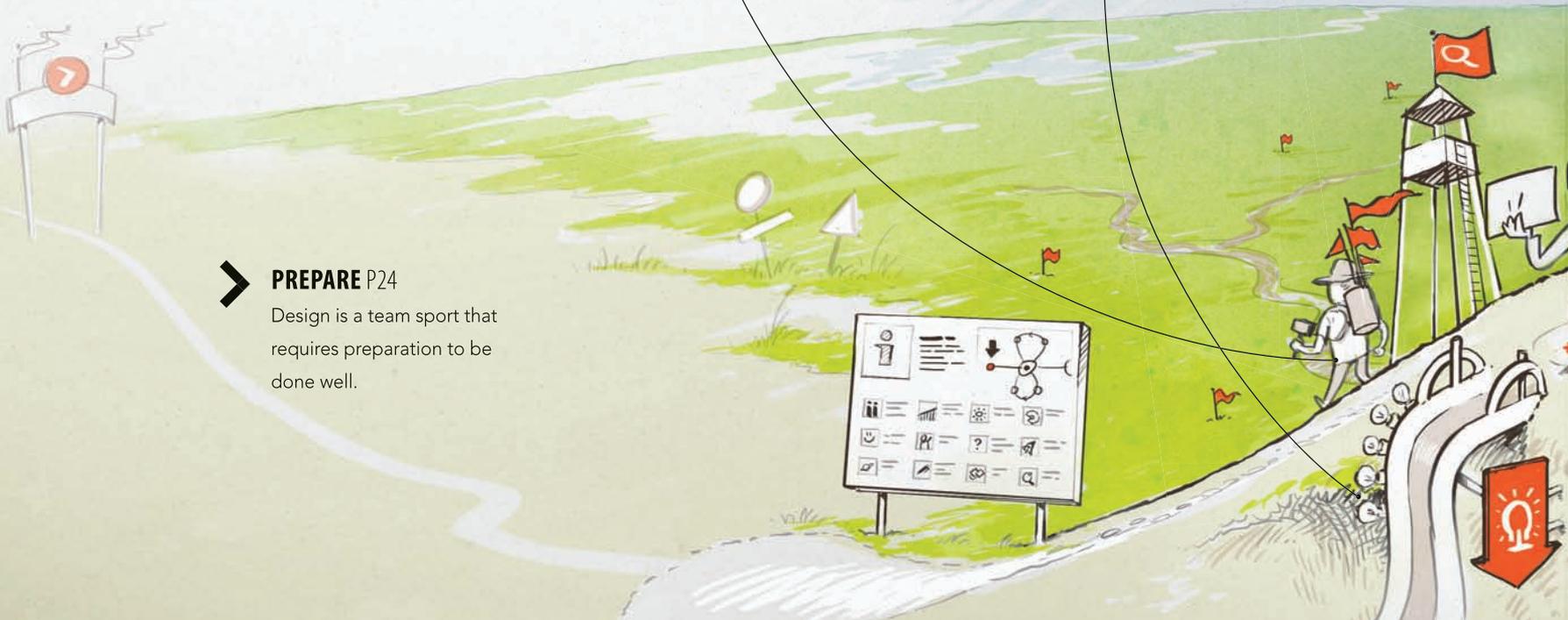
All design journeys start with the customer, context, and your business in mind. Understanding these is the key to designing something better.

## IDEATE P124

There is no single right solution. Ideation will enable you and your team to unlock and build upon each other's ideas.

## PREPARE P24

Design is a team sport that requires preparation to be done well.



**SCALE** P214

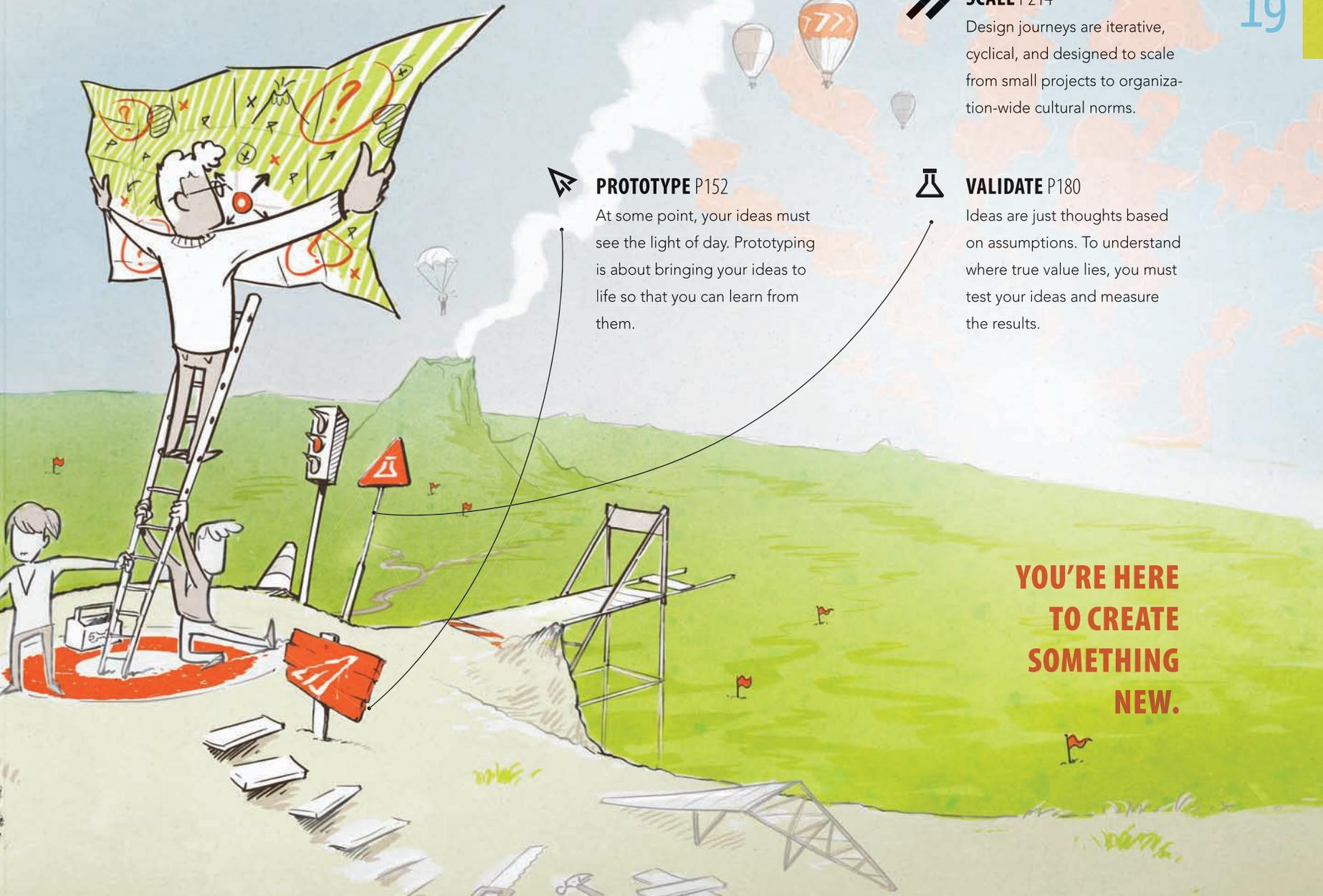
Design journeys are iterative, cyclical, and designed to scale from small projects to organization-wide cultural norms.

**VALIDATE** P180

Ideas are just thoughts based on assumptions. To understand where true value lies, you must test your ideas and measure the results.

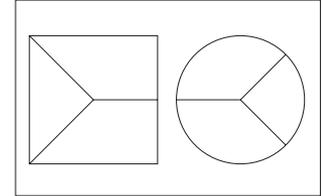
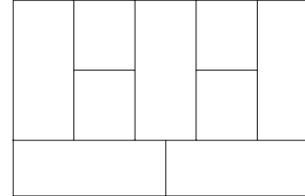
**PROTOTYPE** P152

At some point, your ideas must see the light of day. Prototyping is about bringing your ideas to life so that you can learn from them.

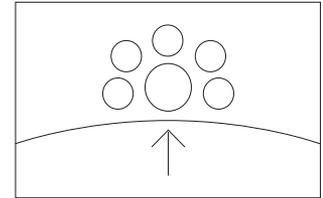


**YOU'RE HERE  
TO CREATE  
SOMETHING  
NEW.**

# YOUR TOOLS



As a designer, your first mission is simply to step out of the box you're in and observe the world and your customers in their natural states. Don't come at this with preconceived notions about what your customers are trying to achieve or how the world is ordered. Just watch and listen.



The first tool comes from skills we already possess – observation. When was the last time you stepped back and just watched and listened to your customers? Try it. We're sure you'll learn something new.

## CREATING IMPACT

As you're watching and listening, start to look for patterns as well as interesting, unexpected actions, events, or occurrences. These create fodder for anecdotes that you can use to draw your manager or other team members into the human stories behind your products. If you've never used actual customer anecdotes and stories in a presentation, we can tell you that you're in for a great surprise.

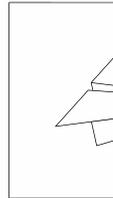
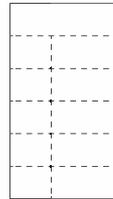
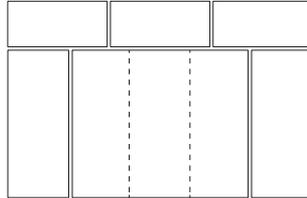
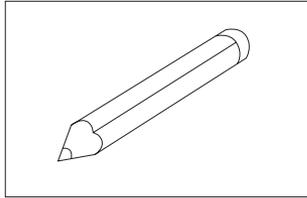
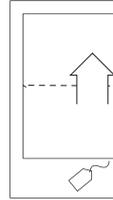
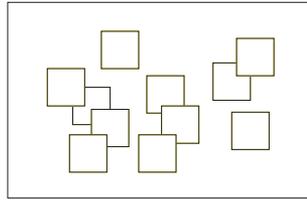
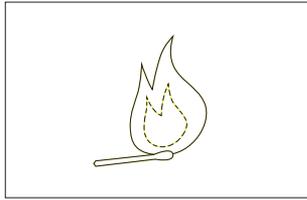
All people like stories and will be more interested and invested than they would if they were presented with only data. In fact, in the next chapter you'll find a tool specifically meant to help you design stories to deliver the impact you're looking for.

## NOT OBSOLETE

As you become comfortable simply watching and listening to your customers, it's time to start using some new tools – design tools. Rest assured, you **do not** have to stop, nor should you stop using the tools that you're comfortable with. In fact, just as you cannot hope to change your company overnight, it's very unlikely you'll get everyone to believe your current tools are obsolete; and they're probably not. Instead, just as you might employ a new set of tools to work on a project at home, start to add a few new design tools to your belt (you wouldn't use a screwdriver to measure a wall, would you?!).

## USEFUL DESIGN TOOLS

First, employ observational tools. These include tools that help you capture people's wants, needs, pains, and ambitions. You might also add to your belt tools for questioning and problem framing. After all, you can't expect to learn everything about your customers by simply watching them. Beyond observational tools, other design



tools include ideation tools, prototyping, and validation tools, as well as decision-making tools. These concepts might be quite familiar to other people on your team who have been designing for a while. But, no matter. We've included a variety of incredibly useful tools in this book to help you take business design to the next level.

## GROW COMFORTABLE

As you become more comfortable using some of these tools, you'll no doubt notice that your old tools are becoming auxiliary or backups. You might even couple your old tools with your new (designer) tools to complement each other. For instance, you can use market data to bolster the anecdotes you gather in the field. Imagine the possibilities! The key here is that you start small and slowly develop mastery of the new tools and practices that at first may feel uncomfortable to wield. Don't worry, after you've used your designer tools a few times, they will become easier and more comfortable to use. And, through your new design-colored glasses, we are confident that you will begin to see the world in a whole new light. ■

## THERE IS NO **TOOL CULTURE** (YET)

Where accountants, doctors, and surgeons are trained to use tools, business people are well trained for operations. They think they can innovate, but they lack the right skills and tools to do so.

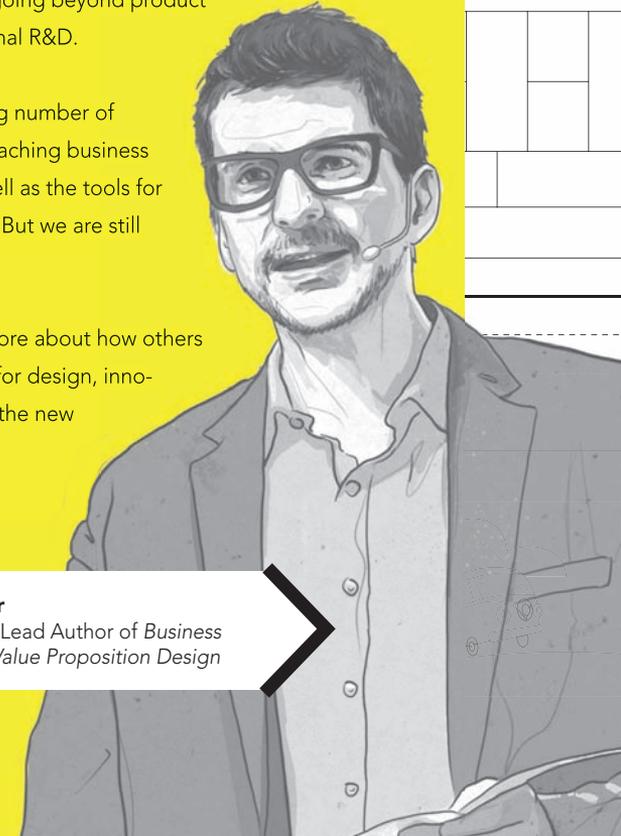
Whereas Apple and Amazon continuously reinvent their business models and are successful in doing so, other companies are helpless. Their traditional corporate structures conflict with design processes and innovation. It is in nobody's P&L so they just don't care. Sure, companies innovate their products. But they have a hard time going beyond product innovation and traditional R&D.

Nowadays an increasing number of business schools are teaching business model innovation as well as the tools for design and innovation. But we are still very much at the start.

I am excited to learn more about how others develop and use tools for design, innovation, and strategy as the new drivers of business.

### Alexander Osterwalder

Co-founder Strategyzer, Lead Author of *Business Model Generation* and *Value Proposition Design*





FLIGHT NO. **BM 1106 03.21** START BOARDING GATE **J30** SEAT NO. **18E**

# FAST PASSES

FAST FREQUENT FLYER

## WANT QUICK ANSWERS?

We have provided you with some fast tracks so you don't have to stand in line waiting for your future. These fast tracks will guide you to the relevant tools, skills, or case studies. Learn from the experience of others and apply it now.



FLIGHT NO. **BM 1106 03.21** START BOARDING GATE **J30** SEAT NO. **18E**

## I WANT TO DESIGN A STRATEGY

I need a plan of action to take my team to our desired future state.

### STEPS:

- » Understand your current business model(s) and understand your customers by observing and asking questions **86**
- » **Develop a point of view** by creating your 5 Bold Steps Vision® and transforming your vision into a story and seeing if it resonates **58**
- » Ideate new business model options **142**
- » Prototype new value propositions **152**

### PAGES:



FLIGHT **DB BIZ8** TIME **05MAR** GATE **G13** SEAT **19B**

## I WANT TO DO BUSINESS PLANNING

I want to move **beyond spreadsheets** and explore business planning with my team.

### STEPS:

- » Map the current context you operate in **110**
- » Understand your current business model **114**
- » Understand your (future) customers **98**
- » **Revisit your company's vision** **56**
- » Design future business model options **142**
- » Propose ideas to prototype **152**

### PAGES:

FAST P  
BOARDING

4.11  
TIME 20:00 SCREEN 03 ROW SEAT 15 21

## I WANT A STRONG & SHARABLE VISION

I want to develop a **North Star** with my team so we know where we are headed.

STEPS:	PAGES:
>> Develop your point of view and make a Cover Story vision® with your team	64
>> <b>Validate your cover story in- and outside your company</b>	180

## I WANT TO CREATE A SWOT OF MY BUSINESS

What are the **strengths, weaknesses, opportunities, and threats** for my business?

STEPS:	PAGES:
>> Understand the context of your business	110
>> Understand your business model(s)	86
>> Determine strengths and weaknesses	116

UNIQUE OFFERING! -FAST PASS-

## I WANT TO INNOVATE /GROW MY BUSINESS

There are no shortcuts, but we do provide you with some fast tracks so you don't have to stand in line waiting for your future.

STEPS:	PAGES:
>> Do the Double Loop	16

## I WANT TO WORK AS A STARTUP

Here's how you can work lean and mean when you want to bring your idea to market. **Learn from startups.**

STEPS:	PAGES:
>> Prepare your <b>point of view</b>	48
>> Understand: observe and ask questions (!)	86
>> Ideate your business model options	142
>> Sketch a low- and high-fidelity prototype	172
>> <b>Validate, validate, validate</b>	180
>> Tell stories during your journey	72



USE A  
FAST PASS  
OR PREPARE  
FOR A FULL  
JOURNEY >>>

**PREPARE**



# THE DESIGN JOURNEY **PREPARE**

PREPARE YOUR **TEAM**

PREPARE YOUR **ENVIRONMENT**

PREPARE **HOW YOU WORK**

INTRO	<b>EVERY JOURNEY STARTS WITH PREPARATION</b>	P26
	<b>PREPARE YOUR TEAM</b>	P30
	<b>PREPARE YOUR ENVIRONMENT</b>	P32
SKILL	<b>MASTER FACILITATION</b>	P34
SKILL	<b>MANAGING ENERGY</b>	P36
TOOL	<b>PREPARE HOW YOU WORK (TOGETHER)</b>	P38
TOOL	<b>SCREENPLAYS</b>	P40
TOOL	<b>TEAM CHARTER</b>	P42

# EVERY JOURNEY STARTS WITH **PREPARATION**

---

Whether you're about to go on a journey of exploration to understand your customer or design new business models for your future, preparation is key. You wouldn't go into battle without preparing first. Likewise, you'll need to prepare before launching a design (or redesign) initiative.

## **DESIGN IS ABOUT PREPARATION**

The design process requires preparation in order for it to run well. You must prepare to observe and understand your customers, business, and context. You must prepare to ideate, prototype, and validate. What this boils down to is that to set yourself and your team up for success, you must prepare your team for the journey ahead, prepare your environment for the work that will ensue, and prepare your tools so that you'll get the best results from everyone.

## **SET YOURSELF UP FOR SUCCESS**

The design process may be different from many of the other processes you're used to. For one, it is not really linear; it's cyclical and iterative. It's about embracing uncertainty. Not everything can be planned or controlled. It is also a full-contact team sport. Teams that take the time to prepare often enjoy much better results and outcomes. Design also requires physical space to work in. And not just people hunched over computers. The people designing the better business will need space to ideate, prototype,

and validate. It also requires that you employ new tools, which also necessitate preparation in order to achieve the best results. Last but not least, design requires that you get used to a new way of working and a new project structure. It's not about planning. It's about maximizing the chance of a positive outcome and empowering others to make real change. There are things you can control and things you can't. **Set yourself and your team up for success by controlling what you can;** don't leave things up to chance.

## **PREPARE YOUR TEAM**

Babe Ruth, the famous American baseball player, once said, "The way a team plays as a whole determines its success. You may have the greatest bunch of individual stars in the world, but if they don't play together, the club won't be worth a dime." The same can be said about designing great businesses: the best businesses are the products of great teams.

That said, not just any team will do. A team that will generate the most useful ideas from its key findings, and that will most

---

thoroughly prototype and validate those ideas, is made up of a diverse group of unusual suspects (think the *A-Team*, not *Friends*). They will find diamonds in the rough where no one else has. They will challenge each other. And, by virtue of their diversity, they will bring with them a network of other people and resources that will come in handy when it's time to get down and dirty.

### SEARCH FOR THE REBEL

When it comes to big hairy questions or initiatives, most of us are unwilling to take a leap and try something new to achieve the outcome we dream of. In order to do this, we need a rebel. A rebel is someone who is willing to stand up and announce that the time has come to take a new approach to solving a problem or answering a question. This person has the ability to carve out time and broker for resources for the design journey. The rebel is the one who will persist and ensure that you're able to try something new before going back to the old way of doing things.

**TIP!** Not just any team will do. The people on your design team must want to be there. Otherwise, they'll push for business as usual.

### PREPARE YOUR ENVIRONMENT, YOUR SPACE

By now you're aware that design is not linear. It is an iterative process in which you will constantly need to refer to artifacts that have been developed along the way. Carting these around the office and sticking them on different walls every other day not only is it a pain in the neck, but it also reduces the time you have to actually design. This reduces overall productivity. Having a "war room" where the team can get together and see progress will boost productivity and efficiency tremendously.

### PREPARE HOW YOU WORK (TOGETHER)

Tools like the screenplay – introduced later in this chapter – will help you design your meetings (or design sprints) to maximize your time together. Visual artifacts like the customer journey and Business Model Canvas will help your team hold more focused strategic conversations. Taking the time to think through how you'll use these tools will help you maximize their value. It's not hard work – but it's essential. >>

## EVERY JOURNEY STARTS WITH **PREPARATION**

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### **SO, WHERE SHOULD YOU START?**

**Think big, but be willing to start small!** Most people approach big projects and new processes by seeking commitment from the board or an executive committee. This is fine and may work in some cases. Design doesn't require a certain outcome. Instead, it's about the journey, the findings you obtain along the way, and the options you generate and validate. With that in mind, here are some ways others have started their design journeys.

### **WITH THAT IN MIND, HERE ARE SOME WAYS OTHERS HAVE STARTED THEIR DESIGN JOURNEYS.**

Of course, you could also start big and go straight to the board. If you decide to take that route, ask for a budget to train your team in design thinking for strategy and innovation. Whether or not there is an appetite for design in your organization, your colleagues will certainly develop skills and take journeys that deliver better business results, however small or incremental.

### **1 FIND YOUR SPARK**

Change starts with a spark. Something in the world shifts, and someone reacts to that shift. Whether it's for yourself or your company, to start your design journey, you'll need a reason to take the journey in the first place.

### **2 FIND AMBASSADORS**

Business as usual doesn't leave much room for design process if you don't have ambassadors on your side. Socialize your idea with a few potential ambassadors. If you get them on board, your journey will be a whole lot smoother.

### **3 RECRUIT THE RIGHT TEAM**

Design is not a journey to be taken alone. Success in design comes when a team of people are in it together and are collectively compelled to see the process through. You'll need varying points of view, skills, and a good network to tap into. Build your team with this in mind and you can't go wrong.

### **4 RAISE ALL BOATS**

Organize a targeted (not generic) training course or bring in a thought leader to help ignite interest in business model innovation or strategy design.

## FIND YOUR **AMBASSADORS**

Courses and master classes are great ways to learn new ways of working while becoming familiar with a new set of tools, skills, and mindsets. Oftentimes you'll learn about other organizations that have employed design successfully. Use this insight to evaluate where and how you might further introduce design into your organization.

### **5** DESIGN WORKSHOP

Organize a design workshop focused on business model innovation or strategy to immerse yourself in the design process and determine where the goal is for you and your team to co-create a concrete deliverable. This could be the design of a vision, a business model, or a value proposition for a new concept.

### **6** FIND THE STRAGGLERS

Pick one of your existing products or services that's struggling to generate revenue (or profit). Run a workshop with a diverse team to generate new business model ideas.

### **7** GET OUT OF THE BUILDING

Get out of the building and talk to customers to understand what matters to them. What do they say? What do they think? Present your findings to others in your organization. ■

Preparing for a small team is one thing. Preparing for a large company is quite another.

So how do you best prepare for an innovation journey as an established company? We asked organizations like 3M, Lufthansa, SAP, ING Bank, MasterCard, GE, Philips, and Toyota how they have been nurturing and supporting cultures of innovation and design thinking. They shared their findings during a summit in New York, February 2015.

Their biggest takeaway: in order to prepare for innovation and design thinking, it is an absolute must that companies identify champion users of design tools, such as the Business Model Canvas, the vision canvas, and other human-centered tools. The champions, or ambassadors, must be proficient in the "lean" approach to design and development and carry with them a designer's mindset at all times. No problem is too big or too small for these ambassadors.

When your goal is to scale design throughout your organization, it's essential to find and train more than one ambassador. In fact, you'll need to create an army of ambassadors who are familiar with and passionate about the new ways of working. They need to adopt and help spread design approaches to business by doing more than they talk. ■

# PREPARE YOUR **TEAM**



You won't win a soccer match with 11 strikers or a football match with only quarterbacks. The same holds for business. Whether you're trying to win in sports or in business, it's crucial to employ players with varying skills (and superpowers) – the team needs to be multidisciplinary.



Don't forget to have fun together! Hey! Who brought the drone to the party?!

Unusual suspects: that new graduate you just hired; a high-energy up-and-comer; or someone young, with interesting ideas, that you think of as an idealist.

Sales and marketing gurus who know the customer.

## **BUILD A MULTIDISCIPLINARY TEAM**

The ideal team will be able to cover a wide range of tasks. Need someone to write a proposal? Add that person to the team. How about someone to design a pitch deck? And maybe we need a coder . . . You get the picture.

The more viewpoints the team brings to the table, the more options that team will be able to generate. There is no one single right solution in any design, business or otherwise.

## **FIND THE UNUSUAL SUSPECTS**

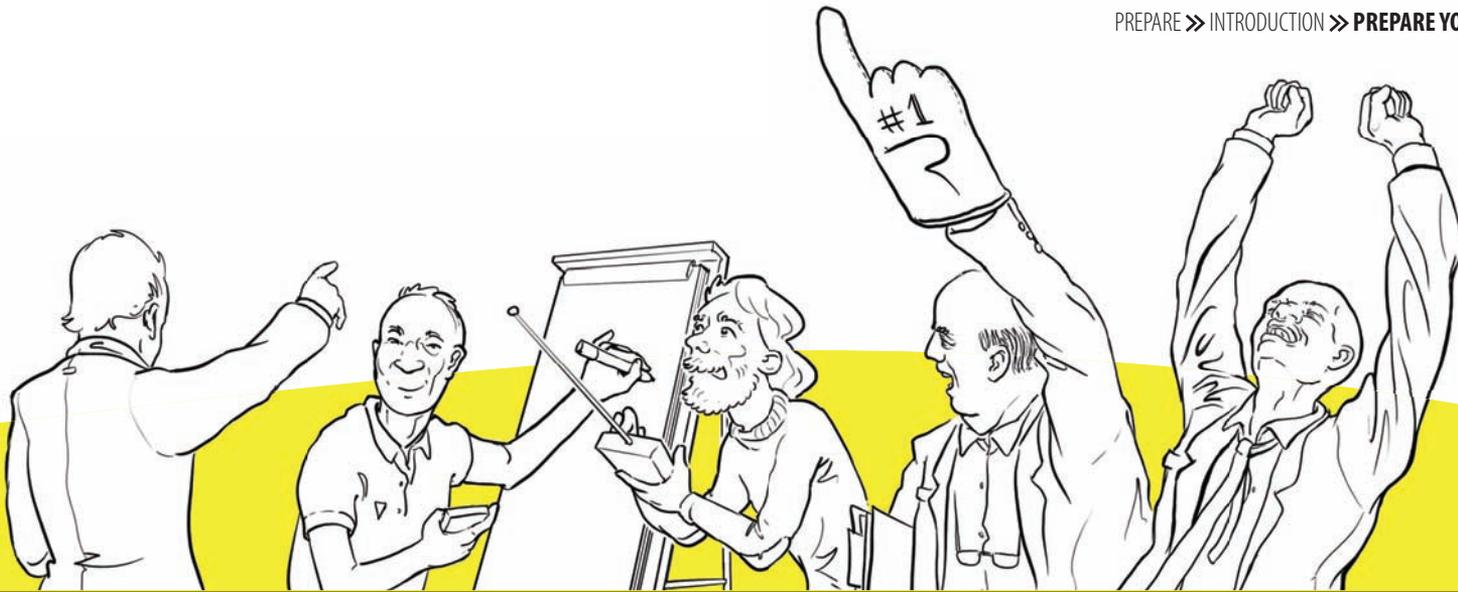
If every team member has the same exact life experiences, skills, knowledge, and viewpoints, the range of options they will zero

in on is incredibly narrow. To avoid that, intentionally design your team to include people from different departments – and with different skills levels, backgrounds, cultures, and mindsets.

## **ROLES: IT'S NOT ON YOUR BUSINESS CARD**

When you look at a business card, what do you see under the name of the person? Likely a title, and that title is very likely not that person's role.

Roles describe the responsibilities that someone takes on, either formally or informally, as part of the team. They play a central part in getting things done. Roles, not titles, are critical to your success. It is important that each team member take ownership



A strategist or product manager who always has the North Star in mind.

Kickass visual facilitators to drive the project forward, harnessing all of the energy.

Lateral thinkers, mavericks and rebels, hackers, developers, and designers.

An executive sponsor takes responsibility when things get tough.

Ambassadors and fans to increase engagement.

of the design, both while working on the design and when it comes to pitching ideas to other stakeholders. Designing the right roles helps team members understand how and where they can best contribute to the end result. The roles people play on your design team will vary from ambassadors to sales, and from visual thinkers to engineers.

Just as you'll intentionally design who's on the team, you also need to design the roles people play on that team. When your team doesn't know the plays, you can't score a touchdown.

## WHEN TO ASSEMBLE A TEAM

When considering your design team, it's essential that you assemble the right people, with the right attitudes, at the right

time. You'll need this team for design workshops, brainstorming, and fieldwork: when you need to get out of the office to understand what your customers want, need, and do. You'll need to assemble a team to design and produce prototypes.

Unlike in most corporate settings, do not assemble a team for a project or to simply join meetings or discussions. Do not assemble a team to engage in planning if that same team is not going to engage in the design process. Do not assemble a team for project communication; that's what the facilitator is for. Your design team's goal is to do and make and learn and deliver results. ■

# PREPARE YOUR **ENVIRONMENT**

Design is not business as usual. The spaces your team designs in must be able to handle a new way of working.

## **A SPACE FOR PEOPLE**

If design is a contact sport, then the environments you play in must be able to handle the frequent interactions of the team. Design isn't about meeting, sitting, talking, and leaving the meeting to go back to email. It's about standing, interacting, writing on sticky notes, going outside, crunching numbers together, and assembling to update each other before doing it again.

The best design environments take into account how people interact – not just while they're seated, but also while they're standing, evaluating a canvas on the wall. These environments leave space for working together and presenting concepts. The best design environments are dedicated for a specific project, so that all of the design artifacts can be left as is, enabling the team to quickly track its progress.

## **HOME BASE**

However you prepare for your environment, your goal is to create a home base where your team can be creative, soak in the information, and have meaningful discussions about it. When-

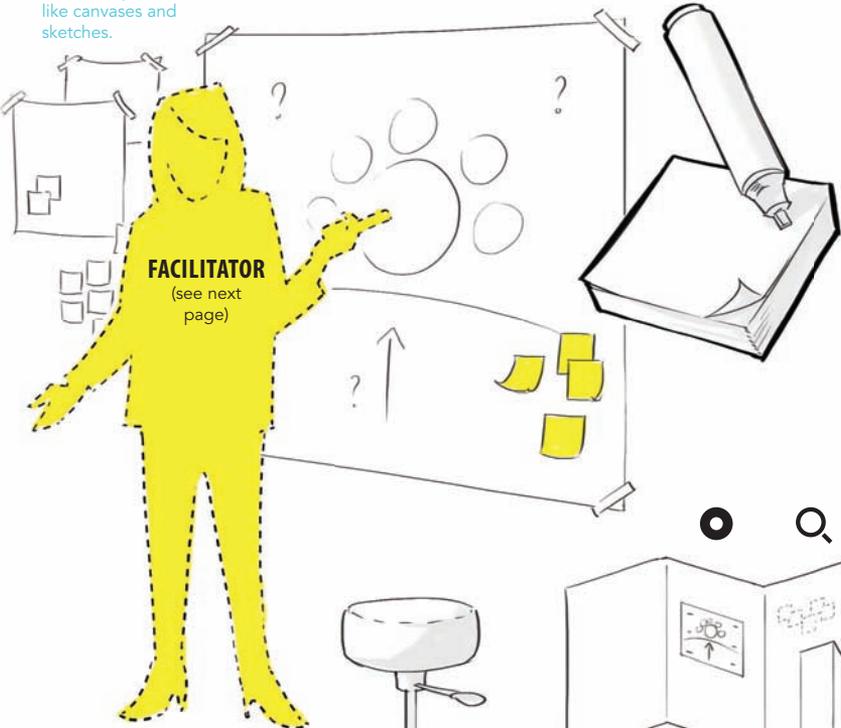
**A PLACE TO HUDDLE**  
There should be places to huddle in order to think through and discuss new ideas.



**GET ENOUGH SPACE**  
Does the room have the capacity to hold your entire team comfortably while sitting as well as moving around?

**WALL SPACE**

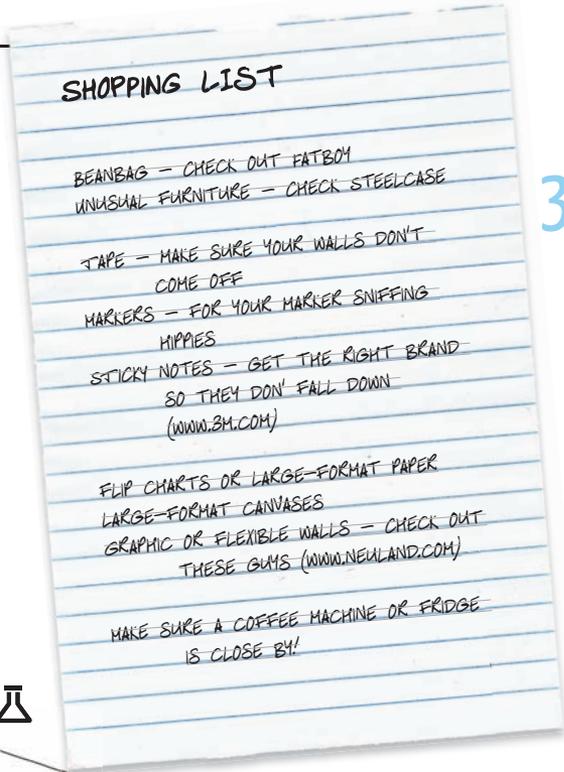
Any design environment must have ample wall space to hang or tape artifacts, like canvases and sketches.



**FACILITATOR**  
(see next page)

**TOOLS**  
Do you have all of the necessary tools for design: sticky notes, paper, markers, canvases, etc.?

**KEEP IT UP**  
Ideally, your artifacts should be left in the room during your project.

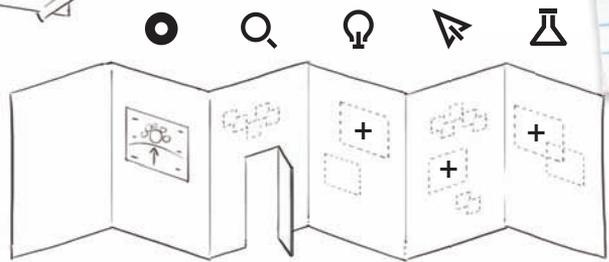


**SHOPPING LIST**

BEANBAG - CHECK OUT FATBOY  
UNUSUAL FURNITURE - CHECK STEELCASE  
TAPE - MAKE SURE YOUR WALLS DON'T COME OFF  
MARKERS - FOR YOUR MARKER SNIFFING MIPPES  
STICKY NOTES - GET THE RIGHT BRAND SO THEY DON'T FALL DOWN (WWW.BH.COM)  
FLIP CHARTS OR LARGE-FORMAT PAPER  
LARGE-FORMAT CANVASES  
GRAPHIC OR FLEXIBLE WALLS - CHECK OUT THESE GUYS (WWW.NEULAND.COM)  
MAKE SURE A COFFEE MACHINE OR FRIDGE IS CLOSE BY!

**VERSATILE FURNITURE**

You must be able to rearrange the tables and chairs in the room to facilitate different modes of working.



ever possible, design a war room: a physical space in your company where people can meet, work, and see the progress visually. Alternatively, you can design temporary, popup spaces that can be rolled into and out of rooms efficiently. You will see the team start to work and think differently. ■

As you move along your design journey, your war room (should) be the heart of the progression.

# MASTER FACILITATION

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The design journey is all about preparation, and it's the facilitator's job to make that preparation and the journey ahead easy for everyone involved. A skilled facilitator is the master of ceremonies as well as the keeper of the light – the energy and intentionality in the room. It is up to the facilitator to help the team achieve the outcomes expected efficiently and effectively.

## MASTER OF CEREMONIES

A facilitator (you or someone else) must run meetings according to a screenplay while also providing space for the team to discuss and make decisions along the way, always being cognizant of the time (and need for frequent breaks, coffee, and food). The facilitator must also capture (or elect a scribe to capture) salient points of view, ideas, and decision points along the way.

Of course, there are many ways to do this. Using a whiteboard, chalkboard, or large flip charts, you can capture short bullet points about what's been said.

## BECOMING A FACILITATOR

If you want to run a design process on strategy and innovation smoothly, engage with your team members, and develop leadership opportunities, you need facilitator skills. The more you know about how to design and run a good learning process, the more team members will feel empowered about their own ideas and participation. They will take on ownership and responsibility, resulting in better outcomes.

## 1 LEARN TO MANAGE ENERGY

Facilitation is first and foremost about managing energy. To maximize output, the team must feel energized. "Energy," in this case, describes how willing and able people are to contribute. "Good" energy helps the process. A discussion at the right time does just that. But hold a discussion at the wrong time, and exhaustion will quickly set in. The core skill of the facilitator is to manage the balance between going into the weeds and building energy.

## 2 IT'S MORE THAN JUST THE MEETING

Facilitation isn't about simply facilitating a discussion or a meeting; it's about facilitating the whole process. You'll need to become the mastermind of the operation. It's not about being right; it's about being effective in how you help teams by designing and managing the process. Facilitation is about the environment, information, the network, the team, and the energy. This includes communicating each step the team will take, as well as the promises made.

## DOING THE DISHES

In a meeting you have two types of people: the ones with “focused eyes” and the ones with “absent eyes”; business people versus designers. They play different roles in a meeting, but both are indispensable in a team.

The former are often misjudged to be shortsighted and judgmental, when they are actually taking things at face value (by nature). They give their opinions freely and have quick answers to everything. The latter’s glazed-over looks are certainly not signs of disinterest. In their heads they are building on ideas and visualizing opportunities before speaking out.

From an outsider’s perspective, it’s hard to see how these people can work together effectively. In fact, you need both kinds of people on a team: fast movers and thinkers. It is my job to bridge those two worlds: Make them combine their brainpower and get them to share the same vision. When I see these situations arising, I offer a spark (or fire starter) to help steer them in the right direction. Then I step out to do the dishes while they perform miracles together.

**Markus Auerbach**  
Director, Audi Innovation Research

### 3 WEAR THE RIGHT HAT AT THE RIGHT TIME

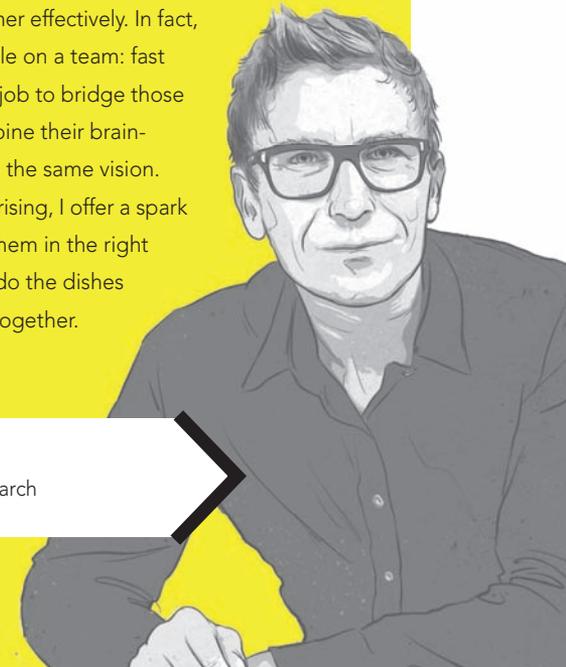
There are times to be utterly optimistic and there are times to be critical. For instance, as ideation is about idea creation and expansion 90% of the time and evaluation and selection 10% of the time, it’s vital that everyone on the team is wearing their optimistic hat at least 90% of the time, during idea creation.

But when it’s time for evaluation and selection, it’s okay for everyone to put on their critical hats. And in both cases, it’s the job of the facilitator to ensure that optimism and criticality are employed at the right place and time in the journey.

### 4 VISUAL FACILITATION

The spoken word is intangible. What has been said five minutes ago only exists in memory. This prompts participants to repeat their argument over and over again.

David Sibbet, the pioneer of visual facilitation, found that by capturing the arguments on a big flip chart, big enough for all the participants to read, the need for repetition vanishes. Take a marker and write down what has been said, to allow the discussion to move on. ■



# MANAGING ENERGY

## TIME MANAGEMENT

As with any process, the design process is deliberately designed with time in mind. When you're aiming for a goal, you're doing so with an eye on a specific date and time; you wouldn't ideate or validate forever. As a facilitator, it's your job to manage the timing of the process.

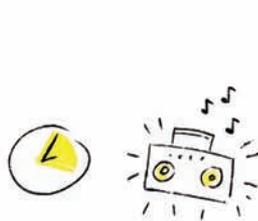
To keep everyone on the same page when you're working together, create an agenda using a flip chart and big permanent markers, and stick (or tape) it to the wall. Keep to the times and don't skip any breaks. You'll find that as people get more used to this structure, they'll deliver better results together.

## DETAIL VS. OVERVIEW

While there are always big thinkers and strategic thinkers in groups, most often, the same people who think big and strategic thoughts are also stuck in the proverbial mud of the current operational execution engine. Of course, it's important to have people like this on board. But, this often becomes a challenge for the facilitator to steer the team forward into the expansive waters of strategic options.

This is especially true in big companies, where a constant balance exists between "let's move to action" and "let's make sure we are acting on the right things." This requires the facilitator

## TIP! USE PUSH AND PULL TO MANAGE ENERGY



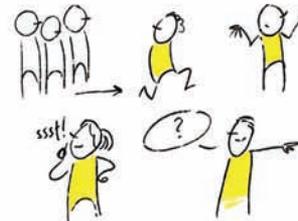
### TIME MANAGEMENT

The best trick for time management is to put the participants in charge of keeping time. They'll start to work toward being efficient.



### PUSH

Actions that push: moving into the group, putting words into people's mouths, making the group jump through formal hoops and structures, and arguing.



### PULL

Actions that pull: taking a step back, not immediately having an answer, being silent, and asking honest, open questions.



### HOLDING THE MARKER

Holding the marker means you have the power to frame the discussion and to move on – the arguments are recorded and need not be repeated.

and the participants to be able to bounce quickly between the big picture and the detail. This is one reason securing a core team, agreeing to a charter, and being transparent throughout the design process are so important. This is where the real facilitation takes place!

### MAKE IT VISUAL

We humans are visual, spatial creatures. To really have an impact and sum up discussions and decision points so that they'll be remembered forever, do what David Sibbet says, and capture what's been said (at least some of it) visually.

The saying “a picture is worth a thousand words” was never truer than when you're trying to record and replay important context from a meeting or design sprint. An added bonus of holding the pen is that it will help you keep the center of attention on the whiteboard, flip chart or wall.

Furthermore, simply reviewing images allows you to replay entire conversations with nary a written word on the page. Whatever you decide, what's important here is that you capture the moments and decisions that lead to outcomes. ■



For more information on visual facilitation, read:  
*Visual Meetings* by David Sibbet

## IT'S LIKE JAZZ

David Sibbet says visual facilitation is like jazz, playing within steady beats and formal structures that empower spontaneity and vitality.

Like live jazz, spoken words flow on. In meetings this often prompts repetition and hopes for real listening. Sibbet finds that capturing these words on large charts acknowledges the listening. The need to repeat diminishes. And a group memory is created. This frees the discussion to move to new levels.

Sibbet is one of the pioneers in visual facilitation, and practiced and taught in this space in the 1970s, when he started The Grove. Visual facilitation is a key to inspiring and engaging groups, supporting big-picture thinking, and the enacting what comes from having a group memory.

Some of his tools, such as the Cover Story Vision Graphic Guide® and the Context Map Graphic Guide®, are featured in this book.



### David Sibbet

Author, Founder, and Chairman of  
The Grove Consultants International

# PREPARE **HOW YOU WORK** (TOGETHER)

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You've put together a team and secured an environment to work together in. Now it's time to actually work together, efficiently and effectively. To achieve the best results as a team while continually staying on the same page, you'll need some design tools.

## **THE DESIGNER'S ESSENTIALS**

There's a very good reason designers and creative types carry around sticky notes and big permanent markers. Sticky notes are expendable, additive, stick to anything, and have the added value of being constrained by size, while permanent markers are, well, permanent, and make what's represented on each sticky note more readable. Hand stacks of each of these tools to everyone and let the ideas fly. By the end of the day you should have a wall of ideas and a floor piled high with half-starts. You get bonus points for getting everyone to draw their points of view (visually) on sticky notes. For some simple sketching tips, check out the profile on Dan Roam, in the prototyping chapter.

## **FRAME DISCUSSIONS USING A CANVAS**

In just about every chapter of this book you'll find canvases, like the Business Model Canvas, Value Proposition Canvas, as well as others that can be used for visioning, storytelling, validating, etc. These visual artifacts will help spark interesting conversations while framing the ensuing discussions.

These tools are not tools to be filled out and put away. As essential design tools, the canvases provided here are also living,

breathing records that document your design journey. When you pair people, sticky notes, markers, and sketching, not only will the design process be faster and easier, you'll get much better results and learn to speak in a new shared language.

## **BETTER MEETINGS VIA SCREENPLAYS**

Meetings have become a (bad) habit for most large organizations. In fact, this habit extends to the way we work: we sit behind our desk working independently from others. We send lots of email. We make a few phone calls. And when we're not sitting at our desks, we're in meetings.

Meetings are not necessarily bad, but more often than not, they are simply planned – not designed. In turn, nothing really happens at the meetings we show up to. There is no clear structure. What's the purpose of this meeting? Who is in the room? How do we make sure we get things done in this time slot? How do we know what is expected from us in this meeting? Those questions rarely get asked – and all the while, we have rooms full of people wasting time, resources, and energy.

## IMPROVISE LIKE A **CHAMP**

After I speak on stage or appear on television and radio shows, people often approach me and say, “You make it look so easy, as if you improvise on the spot! How do you do that?”

The answer is simple. It takes time. I invest a lot of time in my screenplay. Why? You are responsible for designing the flow of an event. When you go through it step by step, you feel where you need to give more energy, where you need to go slow or go fast, and where you can go in deeper.

Once you have a clear path and target in mind, you can take crossroads. In other words, once you get the basics right, you’ll find places where you can improvise. A screenplay forces you to think about how you cut your message into digestible pieces and how you design for energy and interaction from the audience.

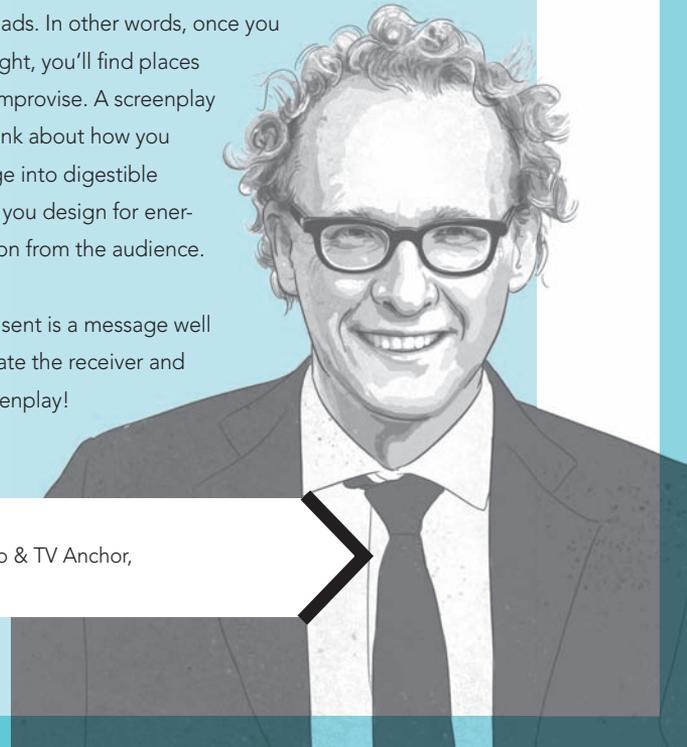
A message well sent is a message well received. Facilitate the receiver and work with a screenplay!

**Rens de Jong**  
Moderator, Radio & TV Anchor,  
Entrepreneur

**TIP!** Have a walking meeting. When walking or standing up, not only is the body more mobile, but so is the mind. It is much harder to become entrenched in an argument when you are mobile.

What’s more, using meetings to share information is also a waste of time. Meetings are more often social and political. We feel badly if we exclude colleagues when sending invites for a meeting. Instead of thinking about who are the right people to be in the room, we think about who we don’t want to exclude. Not having the right people in the room – or having too many people in the room – leads to slow progress. This wastes everyone’s time.

The key to good meetings – and even better workshops – is to create a screenplay. Not to be confused with an agenda, a screenplay details who will work on what when. Most notably, it will help you design a meeting based on the results you wish to achieve. ■



# TOOL SCREENPLAYS



**FOCUS**

define screenplay



**± 45 MIN**

work session



**1-2**

people

Just like it does in movie-making, a screenplay provides an efficient and effective way to design a meeting. The more thorough the screenplay, the better the meeting.

## THIS IS YOUR FACILITATION DESIGN TOOL

Screenplays help you to design a meeting or workshop and share this with the key stakeholders and facilitators. Well-designed screenplays enable you to gain clarity about what can be done during a workshop in order to make decisions about time, activities, and topics to be covered. Most important, a screenplay is a visual tool to help you design for results while managing all of the information in one simple document.

## DESIGN FOR FLEXIBILITY

One misunderstanding is that the screenplay is fixed and therefore not flexible. That's not true. The screenplay should be co-created with the core team to help everyone design a results-driven meeting or workshop. In this way, a screenplay will actually help you to be flexible.

## I LOVE IT WHEN A PLAN COMES TOGETHER.

// Hannibal, A-Team

Moreover, when you design your screenplays in blocks of time/activities, it enables you to shift to new blocks should the expected-unexpected occur, like lateness due to traffic jams, etc.

### BE EARLY

Make sure to arrive at least an hour before the start of the workshop to make sure everything works, that there is coffee and water available, and to test the wifi and the projector.

### AGENDA, ROLES, RULES

Always start with agenda, roles, rules, and outcomes. Agree on these with the team.

### TIME SLOTS

The minimum length to schedule is 15 minutes, but preferably work in 30-minute increments.

### STRATEGIC VISION

You can design strategic vision. For more info look at the vision section in Point of View, page 58.

### COFFEE BREAKS

Never skip coffee breaks. And yes, they really take 30 minutes. People need a break!

### WRAP-UP

In the wrap-up, come back to the objectives and make sure everything is covered.

## CALL SHEET

Who	Role
Marc McLaughlin	Host & Moderator
Maarten van Lieshout	Visualizer
Eefje Jonker	Strategy designer
Mr. Wolf	Facility manager
Josephine Green	Catering

## SCREENPLAY

Workshop S

Location: Amsterdam  
Time: 09:00 - 12:30

Time	Topic
09:00 15 min	Setup and introduction

09:15  
90 min

**Team Exercise Strategic Visioning**  
What is our long-term vision and ambition level? What impact does this have on our business model? What are the implications of our ambition level for the business model?

10:45  
30 min

**Break**

11:15  
60 min

**Share your vision story!**

Teams will present their visions to others and get feedback

12:15  
15 min

**Wrap-up**

Workshop STRATEGIC Visioning for <Client> on <Date>

	Responsibility	Contact Details
tor	Inspire & guide throughout the day	<Phone> <Mail>
er	Visual facilitation	<Phone> <Mail>
ment	Achieve best possible outcome	

STRATEGIC Visioning for <Client> on <Date>

Activity	Who?
<b>Short background</b> – Why are we here? Agenda (drawing) Roles and rules Outcome of workshop	Workshop host
<b>Explain exercise</b> What is vision? (5 minutes) Explain strategic visioning map, 5 Bold Steps Vision® (10 minutes)	On screen by Strategy designer
<b>Team exercise</b> Divide into groups of 4–6 people Put sticky notes on vision, vision themes, and how this shows up (60 minutes) Determine the 5 bold steps (15 min)	Supported by facilitator
<b>Capture</b> Collect flip charts and take pictures – mark captured flip charts.	Strategy designer
<b>Plenary presentations</b> Plenary presentations by teams (30 min) Identify top 3 makers & breakers (15 min) Determine design criteria (15 min)	Teams present Strategy designer connects
<b>Wrap-up</b> Wrap-up of learning this morning. Next steps. End the workshop.	Strategy designer

**CALL SHEET**

Make a call sheet with the most important people needed during the day. Take special care to become friends with the location's technical people – they can save your day.

**LOCATION CHECK**

Always check the location before you run a workshop there. Nasty surprises will ruin the outcome of your session.



**DOWNLOAD**

Download example screenplays and call sheets from [www.designabetterbusiness.com](http://www.designabetterbusiness.com)

**LOCATION CHECKLIST**

- LOTS OF WALL SPACE
- ABLE TO TAPE TEMPLATES TO THE WALL
- SPACE TO WALK AROUND
- DAYLIGHT AND FRESH AIR
- NO DISTRACTIONS
- REFRESHMENTS
- TABLES NOT AS CONFERENCE BUT TABLE GROUPS
- ABLE TO PLAY MUSIC DURING EXERCISES

**CHECKLIST**

- Check the lengths of the time slots and breaks.
- Clear actions per time slot.
- Call sheet.

**NEXT STEP**

- > Run your workshop, meeting, or offsite.

# TOOL **TEAM CHARTER**

---



**PERSONAL**

get to know your team



± **30 MIN**

session



**3-5**

people per group

Now that you've put all of these unusual suspects and diverse characters together in one room, how will you agree on your goals, expectations, and values? And how will you deal with challenging situations? Design a team charter together!

## **SIGN THE CHARTER**

You don't always get to decide with whom you work with. Even if you do, there's no guarantee that you'll be successful. Conflicts of interest and differing values or goals often get in the way of a team's progress.

A team charter will help you create a blueprint for the engine behind a project: a well-balanced team. As a co-created document, the team charter will help clarify the team's direction while establishing boundaries.

The team charter serves two purposes. Firstly, using the charter as an inward-facing document, team members can point out why the team was established in the first place, what the main focus is, and

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## **GOOD TO KNOW WHO YOU'RE TRAVELING WITH!**

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what direction the team will take to achieve its stated goals. Secondly, as an outward-facing document, the charter can help to educate managers and other organizational leaders about the focus and direction of the team.

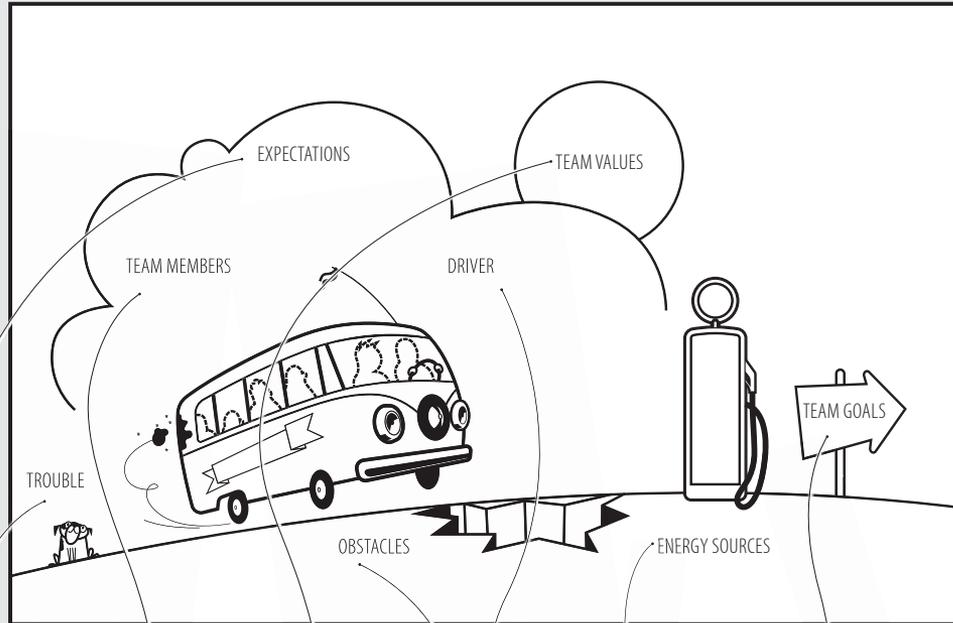
## **TEAM VALUES**

Together, you'll need to decide on the values your team upholds as part of its collaboration. These values will help form the foundation for a successful team, which will make it easier to reach the goal while reducing confusion about the team's objectives. What's more, the charter will provide clear guidelines about how team members will work together and what each person will contribute, which will help ensure the team moves forward and not backward.

Some of the things you'll want to include in your team charter are the following: team members; team goals, expectations, and the purpose for existing in the first place; team values; how the team handles trouble and obstacles; who the team leaders are. Don't be afraid to add things like "have fun!" and energy sources, like "team dinner once per week." These will go a long way in helping the team gel.

Whatever form your team charter takes, just make sure you're all on the same page. In the end you want to have a team of people who build off each other, not a group of people just doing a job.

## TEAM CHARTER CANVAS



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### TROUBLE

What will you do when the shit hits the "van"?

### EXPECTATIONS

What do the team members expect from each other in order to be successful?

### TEAM MEMBERS

Who is on the bus and what will each person individually bring to the team: e.g., role, personal core value, skills, personal slogan, character trait?

### TEAM VALUES

What are the values the team lives by? Are these values recognized by all team members?

### DRIVER

Who is behind the wheel? Who is navigating?

### OBSTACLES

What could prevent the team from working together fruitfully and reaching their goal?

### ENERGY SOURCES

What generates energy in the group? What gets everybody running and going for the best results?

### TEAM GOAL

What is the goal the team wants to reach? When are all the team efforts successful?



### DOWNLOAD

Download the team charter template from [www.designabetterbusiness.com](http://www.designabetterbusiness.com)

## CHECKLIST

- You defined the team goal.
- You defined the driver, team members, and values.
- You defined obstacles and energy sources.
- You had everyone sign the charter.

## NEXT STEP

- > Go get started with Point of View!

## YOU NOW HAVE . . .

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- PREPARED **YOUR TEAM** P30
- PREPARED **YOUR ENVIRONMENT** P32
- BUILT **YOUR TEAM CHARTER** P42

## NEXT STEPS

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- **DEVELOP A POINT OF VIEW** P46  
It will help you decide how to approach your design journey.
- **DESIGN A VISION** P58  
Formulate an actionable vision with your team.
- **APPLY DESIGN CRITERIA** P68  
What are the principles and the benchmarks of the change you're after?

## RECAP

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DON'T FLY SOLO. **THE LONE GENIUS IS DEAD.**

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PREPARE. SET YOURSELF UP FOR **SUCCESS.**

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**BUILD A MULTI-DISCIPLINARY TEAM.**

DIVERSITY IS KEY.

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**FIND AN EXECUTIVE SPONSOR.** CREATE AMBASSADORS.

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**WORK VISUALLY.** YOUR BRAIN WILL THANK YOU FOR IT.

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**MANAGE THE ENERGY.**

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**NOW,  
LET'S GET  
STARTED!**

