EXPERIMENTATION SESSION HANDBOOK

Aalto University Design Factory

INTRODUCTION

This handbook with templates guide you through an experimentation planning session step by step.

We've chosen a few of the methods that we love to use, but feel free to customize your session with any conceptualisation and prototyping methods you would like to use.

WHY?

Experimentation can be a tool to validate new products or services, but more often, it is relevant to start experimentation earlier in the process. Early experimentation is meant to maximize learning and to understand what works, what doesn't, and most importantly, why. By learning before investing, the stakes and costs remain low to make adaptations. Overall, experiments can support concretizing an idea to understand which aspects of the idea prove difficult or impossible to implement, receiving early use feedback to make appropriate changes, or to create buy-in and build momentum for the chosen direction.

FOR WHOM?

These tools are free to use, created for anyone who wants to develop better solutions.

We recommend that each experimentation session has an organizer and facilitator who focuses on running the session rather than planning the experiment. (This is particularly important if you have more than one group working in the same session.) This handbook guides you through what to do.

However, you can use this toolkit so that you take part in the experimentation planning as well. If this is the case, share the cheat sheet and consider sharing the handbook, too, with the entire team taking part in the session. This way, if you get too absorbed in the tasks, they can help in reminding that it's time to move along.

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Design Factory

BEFORE THE SESSION

1

READ THROUGH THIS FACILITATOR GUIDE TO ORGANIZING AN EXPERIMENTATION SESSION

EXPLAIN WHY THE INVITEES' PRESENCE WOULD BE VALUED AND IMPORTANT FOR THE GOAL!

preparations

1 hour

2

INVITE PEOPLE TO THE EXPERIMENTATION SESSION

Consider inviting a diverse group of people, such as a design team, production staff, sales and customers – more diverse participants produce more diverse ideas.

- A good group size is 3-6 people, but you can have several groups in one experimentation session. Aim for diversity in each group.

- If you want to take part in the tasks, is there a colleague you could invite to facilitate the session?

Explain the goal and outcome of the session to set clear expectations. Typical goals:

Experimenting to...

- *communicate, just to make sure we're all on the same page.*

- *clarify what the problem and solution is about, by visualizing or physically exploring.*

- *involve users early, and get feedback by asking questions, or observing responses.*

- *get people enthusiastic for a change.*

- *get people involved in co-development.*

Either way, we experiment to learn before we invest.

3

PREPARE THE MATERIALS YOU'LL NEED FOR THE SESSION

A short welcoming speech or presentation.

Physical experimentation session materials: pens, post-its, printouts of the templates, flip chart paper/ whiteboard, background instrumental music and refreshments, camera (e.g. on phone) to document results.

Digital ideation materials: download templates to Miro/Mural or similar digital whiteboard with the ability to have digital post-its seen and edited by the whole group.

- If you use digital platforms, make sure all of your invitees are familiar with them! If not, send a small tutorial and/or a signup link so that the session itself will run smoothly.

DURING THE SESSION

THIS SESSION IS ORGANISED INTO FOUR STEPS:

1

First, we lay the groundwork for a good session by **setting the stage**: setting expectations and looking into the idea or concept direction that we will create an experimentation plan for.

2

Second, **we create clarity**, starting with a low-threshold warm up, followed by diving deeper into what this concept is about by creating a storyboard. In preparing for experi-mentation, collective agreement abouwhat we know and what we should find out, is most important!

3

Third, we start developing the **experimentation plan**. We formulate the questions we want answered, define what type of prototype could support us in doing so, and make sure we learn from our test set-up. Experiments can go according to plan or not, but there is always something to learn.

4

Finally, we **divide the roles and draft a timeline**, to ensure we can easily continue after the session.

preparations

1 hour

ENJOY THE
EXPERIMENTATION
SESSION!

SETTING THE STAGE

30 min

INTRODUCTION

WELCOME TO THE SESSION!

1

INTRODUCE THE CHALLENGE OR OPPORTUNITY THAT YOU WANT TO GENERATE IDEAS FOR

Why is this an important, meaningful or timely idea or solution direction?

- For example, is this tied to your strategy? Have you gotten feedback about the idea? What would this solution enable? Whose life would be improved if this solution was implemented?

What do we already know about the idea or solution direction?

- If you have any related research results, such as market surveys, or user feedback on the idea, now is a good time to share a few highlights.

- What are constraints around the experiment? Thinking creatively is important, but it's also good to stay focused.

Remind of the goal of the day
(already shared in invitations)

2

INTRODUCE THE WAYS OF WORKING

Rough is good mentality. Today is about creating an experimentation plan in which one or a few core elements of your idea can be isolated and tested meaningfully, not about creating a manufacturing plan.

The goal is to have a clear overview of how the idea might work and which elements are key to its success, to decide what is worth experimenting with.

Although diverging is still possible, this is the time to make decisions and focus on small experiments to learn more with input from others.

In experimentation, quality comes from good planning – we're aiming for a clear plan to test certain elements of the idea, rather than trying to test everything at the same time, to make it easier to learn what works and what doesn't.
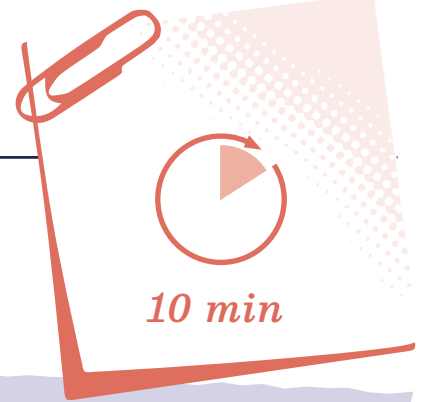
WHY ARE WE DOING THIS?

Motivation hinges on seeing the value of what we are trying to do - this section clarifies why participation in this session matters and why addressing the challenge or opportunity matters.

Sharing the ways of working sets the tone of the session and can help reduce fixation (getting stuck in one direction) or wandering aimlessly (suggesting plans outside of the scope).

materials:

Welcome speech/ presentation

WHO'S AT THE TABLE

5 min

!
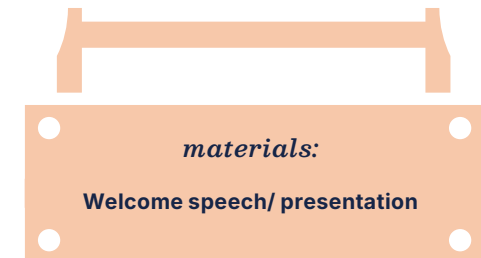
IF THE PARTICIPANTS DON'T KNOW EACH OTHER, HAVE EVERYONE INTRODUCE THEMSELVES TO ONE ANOTHER IN THE GROUP

You can also ask everyone to share an experience or how they are connected to the challenge.

In a face to face session where the participants don't know each other, we recommend making first-name name tags.

WHY ARE WE DOING THIS?

Psychological safety is needed for people to freely share their thoughts and ideas – having names and real people behind the names makes it easier!

TIP!

If you do not have a separate facilitator, assign a timekeeper in the group and share the cheat sheet with the group at this phase!

materials:

If you have a larger amount of participants divided into several groups, have team tables or virtual breakout rooms prepared
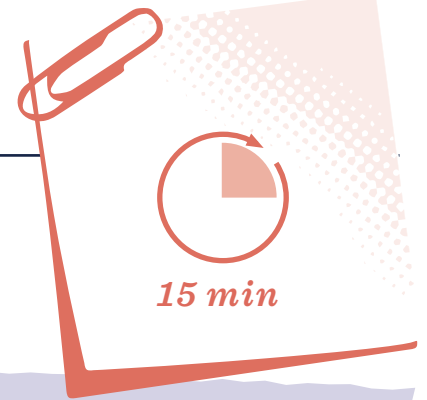
Name tags if needed

FRAMING

!

FIRST WE SPEND SOME TIME DETAILING THE IDEA OR SOLUTION DIRECTION INTO A CLEAR CONCEPT

A good rule of thumb to create a clear description is that it should be understandable for others who haven't gone through your process.

Spend 15 minutes with the team talking through the concept detailing template.

WHY ARE WE DOING THIS?

To design a meaningful experiment, it is important to have a clear understanding of what the concept is. The concept might evolve as you go through the next steps of further detailing.

Don't worry about agreeing on every detail at this stage, this is primarily intended to get all noses in the same direction.

materials:

Concept detailing template

CREATING CLARITY

40 min
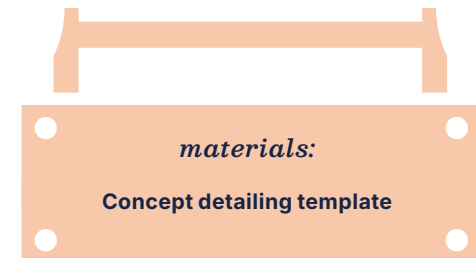
ACCELERATOR

WITHOUT PREPARATION, SHARE YOUR VISION FOR THIS CONCEPT IN 30 SECONDS, ONE TEAM MEMBER AT A TIME.

SET THE SCENE AS FOLLOWS:

5 min

1 Pretend like it is 5 years from now, and you all haven't seen each other since you implemented your concept. You're now suddenly running into each other in the elevator;

2 In 30 seconds, as you are on your way to your floor, share why or how this concept has been a huge success for you;

3 Be enthusiastic, you are happy to see the others, remember that today was the start of this amazing journey;

4 Others can respond, but not interrupt or take over the elevator pitch.

!

Be strict with the time, after 30 seconds you have reached the floor you were heading to, so it's time to step out of the elevator. You go around the group until everybody has shared their vision with the others. If you have the space, try acting out stepping in and out of the elevator to immerse yourself more in the exercise.

WHY ARE WE DOING THIS?

By sharing your vision in 30 seconds, you can only communicate those elements that are important to you. Pretending like it has already happened, removes mental barriers, and makes the stories more vivid and explicit.

These stories may be different for everybody, and that's okay. This is all about understanding each others' interests in this project by focusing not on the concrete concept, but on the meaningful impact it might have for each individual.

STORY WRITING & DOT VOTING

10 min

1

INDIVIDUALLY, WRITE THE STORY OF YOUR CONCEPT IN 6 DISTINCT STEPS

Write each step on a separate sticky note. Start the story with the issue your user is experiencing, then describe how they interact with your concept.

Describe in detail, in an exemplificatory and narrative manner, how the user is going to interact with the service during a specific situation. Mention what is happening, where, how, with whom, why, and what kind of emotions it evokes.
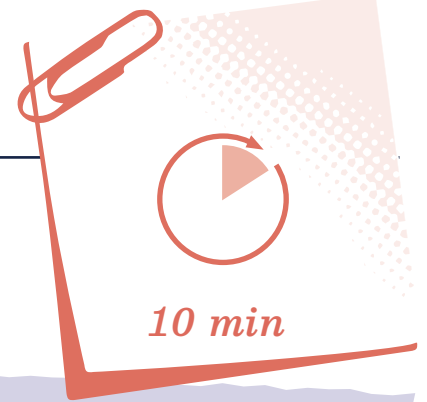
In the last step, make explicit how or why the user is content with the outcomes of using your concept.

2

TAKE STOCK OF ALL OF THE STORIES

Individually, vote for the 5 most interesting steps to continue working with by placing a dot on the sticky note.

You don't need to select steps that go well together.

WHY ARE WE DOING THIS?

Individual writing out the story is a fast way to communicate what you imagine the experience of the concept to be like. This makes it easy to discuss different perspectives and inspire new ideas.

It's not worth it to develop every storyboard in detail. With voting on the steps you can take those elements forward that the group is excited about, even if they are not all part of the same storyboard.

materials:

Post-its

Pens, voting dots

STORYBOARDING

15 min
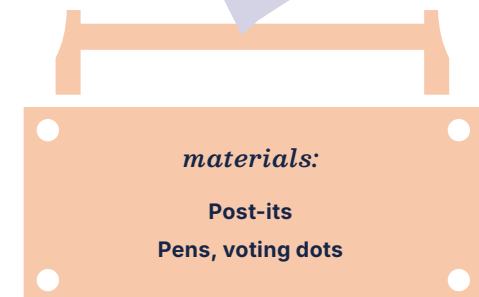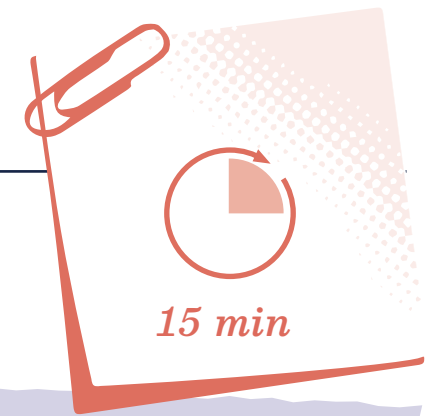
NOTE:

Your sketches should be very basic, focused on communicating the user experience. It is more important to have the flow clear, than to create beautiful, artistic drawings.

ALTERNATIVE:

Sometimes a storyboard might not be the way to go, especially if you don't like drawing. Depending on the available materials, you could consider creating a desktop walkthrough, a paper prototype, or a role play.

AS A GROUP, CREATE ONE STORYBOARD INSPIRED BY THE MOST POPULAR STEPS

Which steps got the most votes? Can you combine them somehow?

This is not a forced fit exercise, be smart about which elements from the steps go well together, and what needs reimagining.

When you create the storyboard, combine text with visuals. You can draw sketches or search for images if you are working on-line. A good rule of thumb for a storyboard is that it should be understandable for people outside of your team.

WHY ARE WE DOING THIS?

We make things visual to get another perspective on the content. Sometimes things get lost in translation when we use just words, and we might imagine different things when reading the same words.

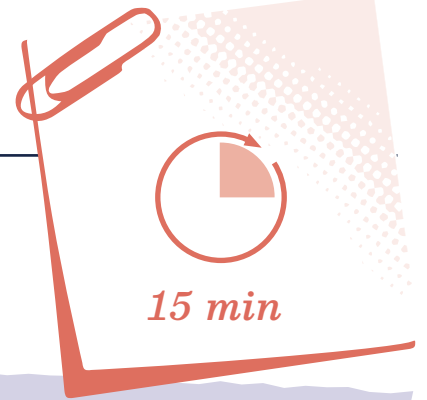*Making it visual is a way to communicate our concept in a different way and enhance clarity amongst the team.*

materials:

Storyboard template
Pens, paper

HIGHLIGHTING ASSUMPTIONS

15 min

!

AS A GROUP, DEFINE ASSUMPTIONS

Go through your storyboard, and for each step, list the assumptions or uncertainties about your storyboard.

These can be for example about the concept's desirability, whether people would want to interact with the concept as intended, or about the technical feasibility, whether these steps are possible in the foreseeable future, and implementable by your team or organisation.
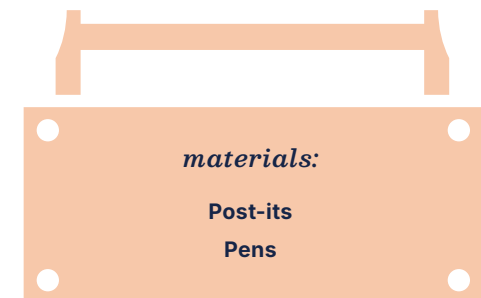
WHY ARE WE DOING THIS?

When we design an experiment, it should be about those elements that we are uncertain about, not about what we already know.

Everything we have assumed, or made educated guesses about, are worth exploring more in an experimentation context, so we can learn more about them.

materials:

Post-its

Pens

BREAK

This is a good moment to have a short coffee break
to come back refreshed to the final work stages!

5-10 min

# DEVELOPING EXPERIMENTATION PLAN

35 min

DECIDING WHAT TO TEST

15 min

!

AS A GROUP, DEFINE: TRUE OR FALSE?

Once you have made the assumptions embedded in the concept visible, think about ways you could test whether these hold true. You do not need to launch into a long and complicated series of testing, but rather review which assumptions are the most crucial ones to explore before proceeding further in developing the idea, and start from there.

Asked another way, what does the effectiveness of the idea hinge on? What would make it useless?
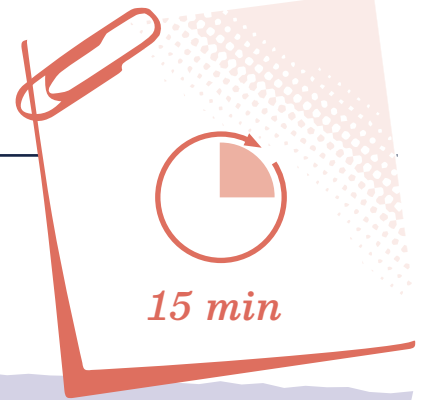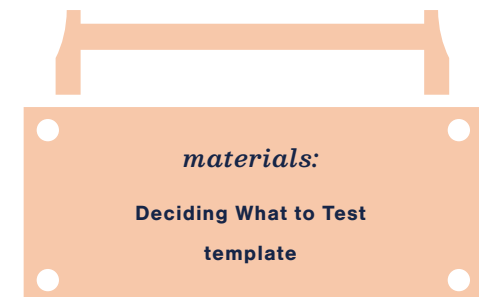
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materials:

Deciding What to Test template

PLANNING EXPERIMENT

PLAN THE EXPERIMENT

Keep your eyes on the prize - what do you want to learn, and how will you know what you have learned? This template can be used to plan potential experiment plans. Again, we encourage you to plan more options that you intend to execute, so that you can mindfully select which ones make the most sense with your needs and constraints.

The key to success is to break ideas down into sub components which can be quickly tested. Identify low hanging fruit, assumptions that can be tested with for example cardboard mockups, desktop walkthroughs, or role plays, before coding entire interfaces or creating beautiful prototypes.
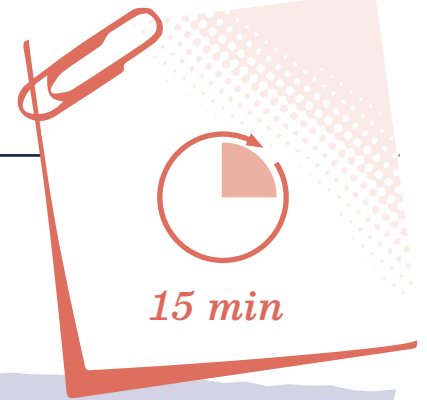
WHY ARE WE DOING THIS?

Spending time thinking about asking the right question and designing the experimentation context is important to make sure you learn from the experiment, even if it doesn't validate your assumptions. A common pitfall is to test too much in one experiment. Focusing on either function, role and context, or look and feel, makes it easier and faster to interpret the results. Thus, the purpose is to create a series of quick prototypes and tests in the initial exploration phases.
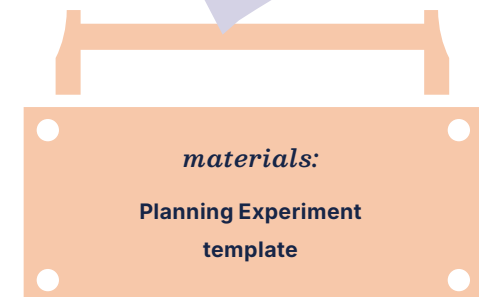
materials:

**Planning Experiment
template**

PREPARING FOR EXECUTION

10 min

WRAP-UP

10 min

1

WHAT HAPPENS TO THE PLANS NOW?

Will you share them with the participants and/or with someone else? How?

- If you have more than one group in the session and you can reserve more than 2 hrs, it's a good idea to have groups share one-minute pitches of their final 2 experimentation plans immediately with everyone present in the session

2

KEEPING CONTACT

Agree how to stay in touch, and when you will meet again to discuss the progress and decide on further steps. How will your development effort proceed? What's the next step in your project? Will the experimentation session participants hear from you again later on in the process?

- **I**f you are organizing the session with your project team, you can use this time to decide on these matters!

WHY ARE WE DOING THIS?

A sense of progress is the best predictor of subsequent development motivation, so you want to make sure everyone knows what their efforts have contributed towards.

Thank the participants for their time and insights.

AFTER THE SESSION

< 1 hr

AFTER THE SESSION

1

**IMMEDIATELY
AFTER THE SESSION ENDS**

Take photos of produced storyboards and templates or save digital files to make sure you can later return to all of the great ideas produced in the session.

For other steps, overviews are enough, but for the final experimentation plan, you might want to add notes on anything else you remember related to them from your group discussions.

2

**SOON AFTER
THE EXPERIMENTATION SESSION**

Soon after the experimentation session: With permission from the participants, summarize the results of the session and share the ideas documented in more detail with at least all of the participants of the session.

Consider also who else might benefit from hearing about these potential experiment directions.

Someone in your organization working on similar issues, who could use the inspiration? Communicating progress to project management and leadership? Offering sneak peeks behind the scenes to your customers or collaborators?

Just make sure you have the participants' permission to share anything that might identify them.

3

LATER ON

Try to follow up with your session participants. What have you already done with the experimentation since the session and what are you working on now?

It's always nice to see what comes out of initial efforts, and it will be easier to get people excited about taking part the next time around when you show the progress you've made.

CONTENT:

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GRAPHICS:

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BACKGROUND:

Aalto University Design Factory

QUESTIONS?

Don't hesitate to get in touch with us!
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