FRAMING SESSION HANDBOOK

FINNISH VERSION AVAILABLE!

Aalto University Design Factory

INTRODUCTION

This handbook with templates guides you through a 2-hour step-by-step framing session to clarify and explore your design challenge or project goals.

We've chosen a few of the methods we love, but feel free to customize your session with any insight mapping and challenge framing methods you would like to use. Similarly, if you're doing this for the first time, you might want to reserve an extra hour to have more time to dig into each step.

WHY?

Framing the challenge is a critical exercise in design. Framing challenges the assumption that we are aligned around what we aim to do, for whom, and why.

The easiest way to think outside the box is to describe the box differently or redraw the box completely! No challenge or goal is without assumptions or limitations, but by spending time on framing, we can make those assumptions explicit and explore several options before deciding on one. That way, you create clarity and shared understanding within your team. The time you spend on framing will help to set you up for success in developing solutions to your challenge.

FOR WHOM?

These tools are created for anyone who wants to frame better design, development, or innovation challenges and are free to use.

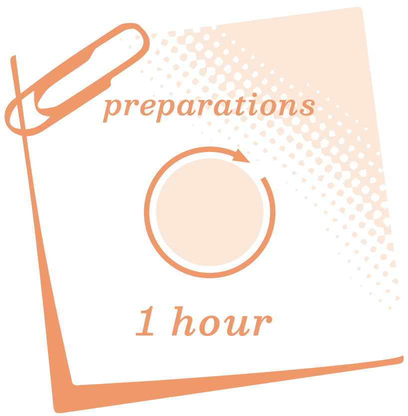
We recommend that each framing session has an organizer/facilitator who focuses on running the session rather than producing ideas. This is particularly important if more than one group works in the same session. This handbook guides you through what to do.

However, you can also use this toolkit and participate in the framing. If this is the case, share the cheat sheet and consider sharing the handbook, too, with the entire team participating in the session. This way, if you get too absorbed in the tasks, they can help remind the team that it's time to move along.

BEFORE THE SESSION

1

READ THROUGH THIS FACILITATOR GUIDE TO ORGANIZING A FRAMING SESSION



2

INVITE PEOPLE TO THE FRAMING SESSION

Consider inviting a diverse group of people, such as a design team, production staff, salespeople 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 framing session. Aim for diversity in each group.
- If you want to take part in the tasks, could you invite a colleague to facilitate the session?

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

Typical goals:
- Make assumptions explicit about what to include or exclude in a development project.
- Spark creative thinking leveraging existing knowledge.
- Translate user needs obtained through interviews or testing.

Explain why the invitees' presence would be valued and important for the goal.

3

PREPARE THE MATERIALS YOU'LL NEED FOR THE SESSION

Prepare a short welcoming speech or presentation. Introduce the topic you want to explore and ways of working (more about this on Introduction, page 6).

Physical framing materials: printouts of the templates, pens, sticky notes, flip chart paper/whiteboard, background instrumental music and refreshments, and a camera to capture creations.

Digital framing materials: use the Miro templates to see and edit sticky notes with all team members simultaneously.

- If you use digital platforms, ensure all your invitees are familiar with them! If not, send a small tutorial and/or a signup link so the session 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 issue for which we will frame challenges.

2

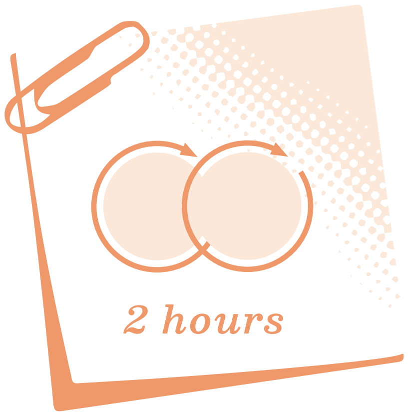
Second, we take perspective, starting with empathy mapping and formulating points of view. We **leverage our existing knowledge** and, if available, real user or stakeholder data

3

Third, we **dig deeper** into underlying motivations and desires and use these to formulate various "How Might We" challenges.

4

Finally, we **select** two "How Might We " challenges that spark interest and use the Acid Test to finetune them.



ENJOY
THE FRAMING!

SETTING THE STAGE

INTRODUCTION

WELCOME TO THE SESSION!

1

INTRODUCE THE ISSUE YOU WANT TO FRAME DESIGN CHALLENGES FOR

Why is this an important, meaningful or timely challenge or opportunity?

- For example, is this tied to your strategy? Have you gotten feedback about this issue? Why do you believe this is an issue worth investigating?
- What would solving this enable? Whose life would be improved?

What do we already know about the challenge/ opportunity?

- If you already have related research results, such as market surveys or user studies, now is a good time to share a few highlights.
- What are the key constraints around the challenge? Open exploration is encouraged, but it's good to stay focused.

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

2

INTRODUCE THE WAYS OF WORKING

Fall in love with the problem. Today is about formulating different ways to frame a problem, each opening up different solution spaces. By jumping to solving problems immediately, we miss out on potentially smarter, more effective ways to address them. Framing informs which part of the solution space we will explore—what we include or exclude, where we position it, and from what angle we approach a situation. We spend a lot of time on framing because we want to be conscious of what we want to achieve as innovators, designers, or development teams.

Each generated frame will include assumptions about the solution direction, the people involved, and the envisioned impact. None of them is definitely right or wrong, but discussing the framing will avoid misalignment in the team.

10 min

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 exploring different frames matters.

Sharing the ways of working sets the tone of the session and can help reduce fixation (getting stuck in one direction) and self-censorship (holding back ideas).

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 issue.

- Remember that some people may not feel comfortable sharing certain comments or their personal thoughts. This is perfectly fine! Just create a safe space for people to share what they feel comfortable saying in the group. People tend to open a bit more when they settle into the session and the discussion gets going.
- Consider including an ice-breaker in the introduction (such as: what is your spiritual animal, or select a word that describes you the most, among others) to set the tone and safe space for the participants.

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

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!

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!

materials:

If participants are divided into several groups, prepare team tables or breakout rooms.

Name tags if needed

STAKEHOLDER PROFILE

15 min

FIRST,

we will spend some time clarifying the issue from the target stakeholder's perspective – for example, an end-user connected to the related product, service, process or experience.

I

AS A GROUP, CREATE A STAKEHOLDER PROFILE

- Pick a key stakeholder related to your challenge. Pick one stakeholder group for now, you can always repeat the exercise with another stakeholder in mind.
- Distill what you already know about this group into a stakeholder profile. A good rule of thumb for creating a clear stakeholder description is that it should be understandable for others who have not gone through your process. To do this, you can leverage previously obtained needfinding data or discuss until an agreement is reached.
- Spend 15 minutes with the team talking through the stakeholder profile template.

WHY ARE WE DOING THIS?

To formulate meaningful design challenges, it is important to clearly understand the end-user and their needs in relation to the issue you are trying to address. The user description might evolve as you proceed in the framing process.Don't worry about agreeing on every detail at this stage; this is primarily intended to get everyone on the same page.

materials:

Stakeholder Profile template

PERSPECTIVE TAKING

EMPATHY MAP

15 min

I

CREATE AN EMPATHY MAP FOR THE STAKEHOLDER PROFILE OR COLLATE INSIGHTS FROM NEEDFINDING RESEARCH YOU HAVE ALREADY ENGAGED IN

You can either do the map for a single person or collate across multiple interviews.

- An empathy map describes a person's experience in a situation, including what they think and feel, see, hear, say, and do, as well as their pain points and gains.
- If you choose to collate, keep contradicting statements; you might want to dig deeper here later.

TIP!

If you haven't engaged with stakeholders, consider sharing your scenario and stakeholder profile with a generative AI Large Language Model (LLM) after you have filled out the empathy map yourself.

Ask what might be often overlooked pains and gains to complement or help reflect on your existing insights. Don't use a Large Language Model to replace actual user data or your own thinking!

WHY ARE WE DOING THIS?

Empathy maps offer a rich understanding of users by considering various attributes influencing their experiences, motivations, and behavior. By explicating thoughts, feelings, and perceptions, an empathy map encourages you to delve deeper into what influences needs and frustrations in a particular situation.

Creating empathy maps as a team generates a shared understanding of the stakeholder's perspective. They align you as a team around what important aspects to focus on, which informs the framing of your design challenges.

materials:

Empathy Map template

POINT-OF-VIEW STATEMENTS

20 min

1

FORMULATE STATEMENTS

For 10 minutes, individually consider the issue and your created empathy map and formulate core point-of-view statements, each using your own template.

- Point-of-view statements are based on rich insights into your target audience's needs. Commonly, they start with a person's description, followed by a need, something they want to do or feel, explained through an underlying reason or motivation, and ending with a barrier or hindrance.
- Ideally, your statements are based on user data or desk research. However, you can also work with assumptions and check these at a later stage or iteration.

2

SHARING STATEMENT

For 10 minutes, share all point-of-view statements. There is no need to reach a consensus now on what to focus on as long as you all understand the statements on the table.

- Discuss any patterns, similarities, or interesting outliers that spark your curiosity

WHY ARE WE DOING THIS?

Point-of-view statements sharpen your team's focus by explaining why issues are interesting and necessary to tackle. Combining insights from earlier research with the team's knowledge and vision allows you to formulate meaningful design challenges more easily.

TIP!

Make all descriptions vivid and specific. So, for example:

- Busy parents of young children (under 5) **need to...**
- cook healthy and delicious meals for their families **because...**
- they value the importance of good nutrition for their children's development **but...**
- they struggle to find the time and energy to plan, shop for, and prepare elaborate meals.

materials:

Point of View template

BREAK

This is a good time for a short coffee break
to refresh yourself before the final work stages!

FORMULATING DESIGN CHALLENGES

FIVE WHYS

15 min

1

DIG DEEPER

For 8 minutes, individually dig deeper into an insight of your choice using the templates provided. Choose an insight on the table that sparks your curiosity. This can be one of your own or one of your team members' insights. At this stage, each group member should choose a different insight.

- Focus on the 'expressed motivation' of your insight. Pretend you are the stakeholder and write on a sticky note, "I want [expressed motivation]".
- Put yourself in the shoes of your target audience. Read the motivation and ask yourself, "Why do I want this?" Start your response with "Because..." and write it on a separate sticky note.
- Read your first response and ask yourself, "Why do I want this?". Again, start your response with "Because..." and write it on a separate sticky note. Repeat this five times.
- You can make assumptions if you don't know the stakeholder's underlying motivations. If you get stuck and can't imagine an underlying motivation, return to an earlier response and change it.

2

TAKE STOCK

For 7 minutes, share all identified underlying motivations.

- Take a learner's mindset and aim to understand why group members might have identified other underlying motivations than you would have. That means avoiding assumptions and staying curious. You want to learn more!
- This is not the time to reach an agreement but to expand your understanding of possible underlying motivations.
- If alternative underlying motivations arise, write them down on separate sticky notes and add them to the pool.

WHY ARE WE DOING THIS?

We don't take user input at face value. Although we believe expressed frustrations and needs are real, there could be underlying motivations driving these experiences. Exploring several underlying motivations might provide more frames revealing more effective solutions.

materials:

Post-its, pens
Five Whys template

FORMULATE "HOW MIGHT WE" CHALLENGES

10 min

I

INDIVIDUALLY, WRITE FIVE DIFFERENT "HOW MIGHT WE" CHALLENGES USING THE TEMPLATES PROVIDED.

Some considerations for each of the three fields:

- **What:** This is what you aim to do as a design team. Often, a goal starts with 'create,' 'enhance,' 'reduce,' 'support,' etc.
- **Who:** Make the stakeholder description specific, including factors distinguishing this group from 'regular' stakeholders. Consider stakeholders who are not your immediate target audience but influence your target audience's experience.
- **Why:** Use the underlying motivations generated in the previous exercise here. While there might be another reason from a company perspective, this challenge should reveal solutions that are desirable for the stakeholders. Remember, this should be a motivation for the "who" in the statement, not your motivation as a developer!

Challenge yourself to explore different design goals (what), different target stakeholders (who), and different envisioned impacts (why). The more diversity, the better!

TIP!

A more specific design challenge is easier to work with in the ideation phase, making it more likely to uncover hidden gems that can be used to generate solutions that apply to a wider group of people. Simultaneously, you don't want to make it too specific, allowing for a wide range of ideas.

Usually, we advise keeping the target stakeholder (who) specific, so not for "all employees" but, for example, "new employees with a migration background." We also advise keeping the design goal (what) broad, not limiting yourself to "create a digital solution" but more broadly, for example, to "support a sense of community."

WHY ARE WE DOING THIS?

The types of problems we tackle through ideation co-evolve. However, how we define the problem influences how we can solve it. Having a few different problem statements will help us create more diverse and creative solutions.

We start with individual work so everyone can gather their thoughts and contribute their perspective to the framing.

materials:

Development Questions template

CHOOSING AND REFINING CHALLENGES

CHOOSING TWO CHALLENGES

15 min

1

SHARING

For 10 minutes, share the created "How Might We" challenges with the team.

- Listen to each other's questions and defer judgment. Consider what various frames include and exclude.
- After everybody has shared, **each team member distributes three dots on different "How Might We" challenges of other team members that speak to them.** The distribution of the dots guides the choice in the next step - think of them as votes for what would be interesting to explore.

2

CHOOSING

For 5 minutes, pick two challenges that spark more novel and creative ideas as a team.

- Ideally, choose "How Might We" challenges that explore very different solution idea directions to allow for more diverging ideation. After all, we don't yet know where the hidden gems might be.
- Don't evaluate the challenges based on which spark feasible and viable ideas. Aiming for the stars and aspiring moonshot ideas is still the way to go.
- You can also combine or create new questions as a group rather than picking two questions exactly in the form they were written.

WHY ARE WE DOING THIS?

No problem definition is assumption-free, and the "How Might We" structure makes some of these assumptions easier to see:

What are we aiming to achieve?
Who are we doing this for?
What kind of ways do we see ourselves doing this?

Discussing these options reveals blindspots and creates alignment across the team.

materials:

Pens, markers or dot stickers

ACID TEST

10 min

1

REFINE THE SCOPE

For 5 minutes, evaluate whether your challenges spark novel and creative ideas.

- Does each challenge spark clear ideas? In other words, are they narrow enough so that you know where to start? If a design challenge is too broad, generating ideas is hard, so you might need to narrow it down.
- Does each challenge spark a variety of ideas? In other words, are they broad enough so that you can come up with more than one type of idea? If not, try to broaden it, for example, by making the goal less specific.
- Check the specificity of the design goals, target stakeholders, and the envisioned impacts. Are at least two components in each challenge specific enough? Are the goal and impact in the right place?

2

ENHANCE THE DESIRABILITY FOCUS

For 5 minutes, evaluate whether this is a challenge worth exploring. Are you confident each challenge tackles a real human need?

- Does the envisioned impact reflect a real stakeholder need or underlying motivation?
- If not, can we reframe it based on the acquired user data instead of assumptions? Or do we need to gather more user data?

WHY ARE WE DOING THIS?

The Acid Test is a quick way to take a look at whether your challenges are scoped well enough to proceed with ideation. It helps avoid wasting time later, especially if you intend to involve other stakeholders to generate ideas.

TIP!

Once you have refined your "How Might We" challenges, you can propose them to a Large Language Model and ask how to narrow or broaden the development question. Review the input from the Large Language Model critically – could these be easier to work with?

WRAP-UP

5 min

SHARE YOUR NEXT STEPS WITH THE FRAMING SESSION PARTICIPANTS:

1

WHAT HAPPENS TO THE CHALLENGES 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 "How Might We" challenges immediately with everyone in the session.

2

HOW WILL YOUR DEVELOPMENT EFFORT PROCEED?

What's the next step in your project? Will the framing session participants hear from you again later on in the process?

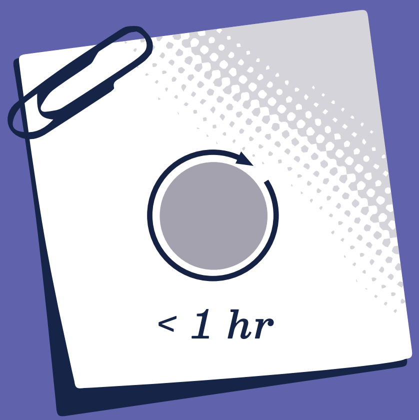
- If you are organizing the session with your project team, you can use this time to decide on these matters!

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



AFTER THE SESSION

1

IMMEDIATELY AFTER THE SESSION ENDS

Take photos of underlying motivations and templates or save digital files to ensure you can later return to all the great frames produced in the session.

Overviews are enough for other steps, but for the two final formulated challenges, you might want to add notes on anything else you remember related to them from your group discussions.

2

SOON AFTER THE FRAMING SESSION

With permission from the participants, summarize the results of the framing session and share the design challenges documented in more detail with at least all of the participants of the framing session.

Also, consider who else might benefit from hearing about these potential solution 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 ensure you have the participants' permission to share anything that might identify them.

3

LATER ON

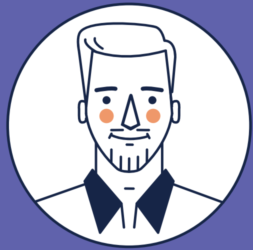
Try to follow up with your session participants. What have you done with the challenges since the session, and what are you working on now?

It’s always nice to see what results from 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:

Tua Björklund

Floris van der Marel



GRAPHICS:

Anna Kuukka

BACKGROUND:

Aalto University Design Factory

QUESTIONS?

Don’t hesitate to get in touch with us!
designfactory.aalto.fi