

User Guide

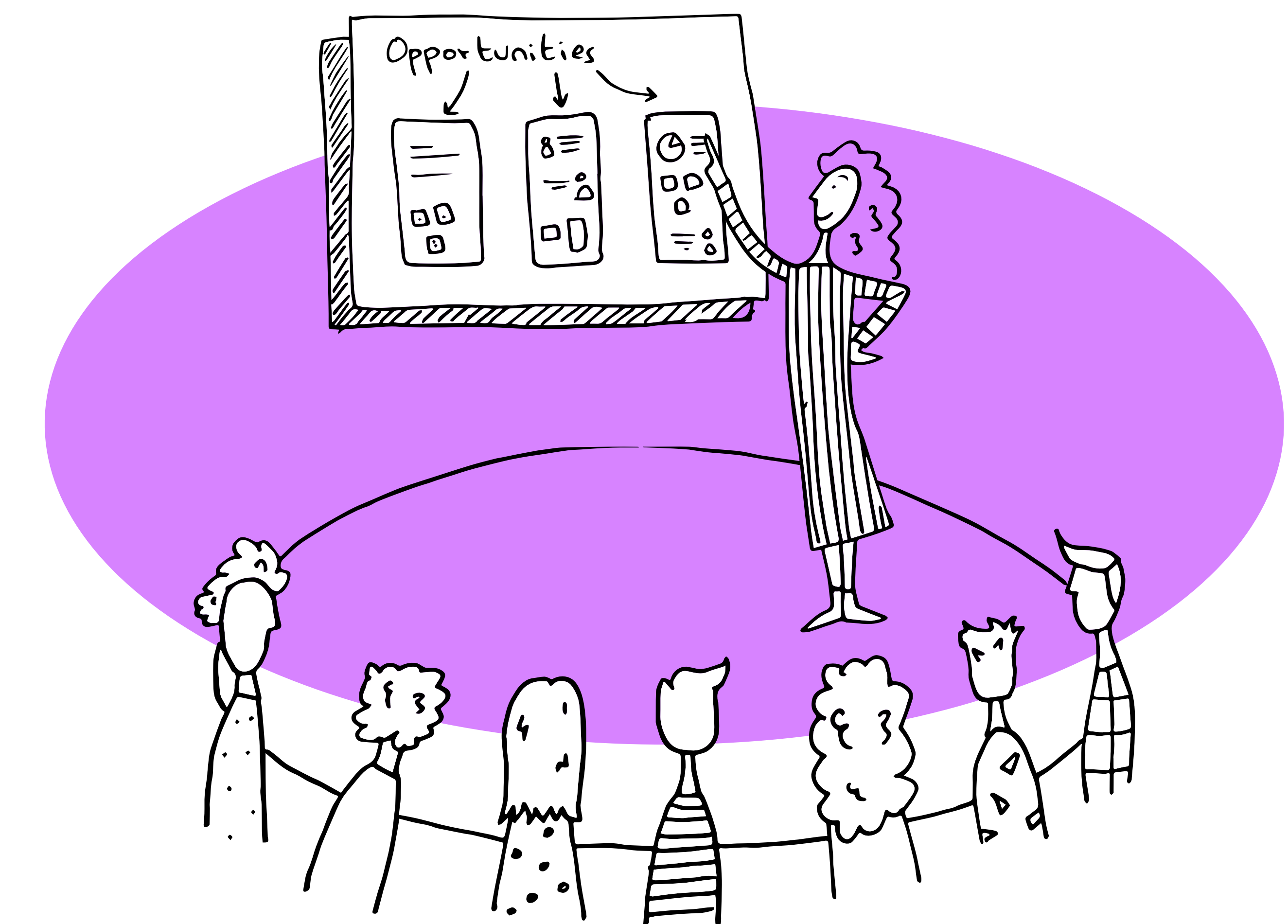
The D@D Impact kit

THE D@D IMPACT KIT
A bridge from research to product



About

The D@D impact kit was designed as part of a thesis research at TU Delft university, strategic product design master program, in collaboration with the Digital@Deloitte team



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Team and contributors: Digital@Deloitte

This guide includes

2 What is the D@D impact kit?

This section is an Introduction to the toolkit. It includes the goals of the toolkit and its three components.

6 Part 1: The impact squares

The first part of the toolkit is a digital card deck. This section explains the structure and content of the cards

12 Part 2: Opportunity evaluation session

The second part of the kit is a structured session done with the digital card deck. This section will include instructions for the session, for the facilitator and the participants

24 Part 3: Quarterly goal workshop

The third part of the toolkit is a quarterly team session designed to facilitate retrospective and alignment on future goals

34 Remote facilitation

This section created an overview on all digital tools used for the remote facilitation as well as includes tips and approach

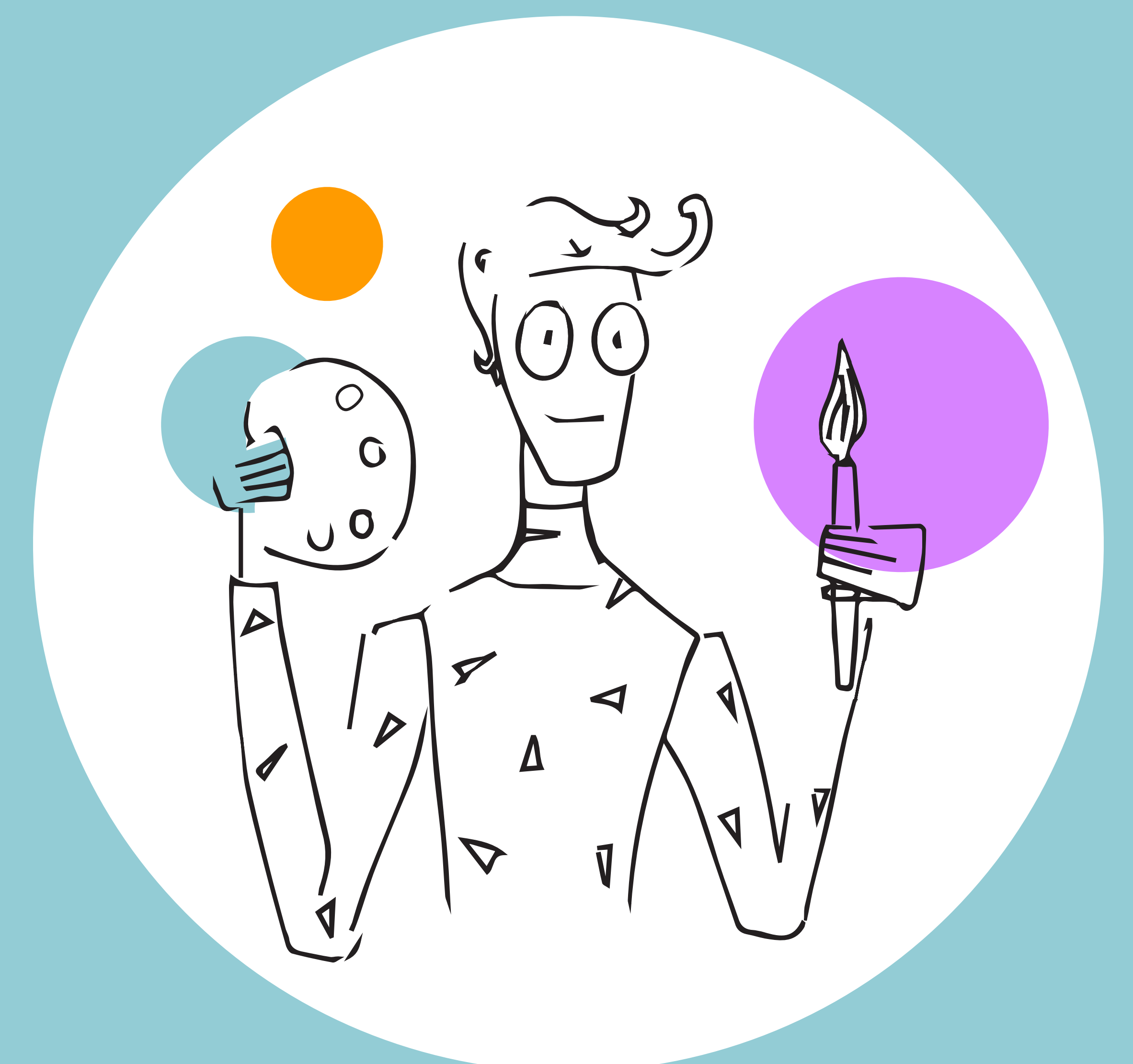
36 D@D kit roadmap

Next steps for implementation of the toolkit, goals for the future and impact potential

The user guide

This guide was designed to perform as a manual for the D@D impact kit. The guide provides instructions and information for team members and leads, and includes facilitation tips and guidelines.

This digital booklet can also be used as a slide deck, to explain the process to the team or stakeholders



Introduction

The D@D impact kit

A team tool designed to create focus by aligning on goals and impact, and reducing friction in the transition from research to co-creation

The toolkit is a team **alignment and discussion tool** designed in co creation with the Digital@Deloitte team. The toolkit main goals are creating focus and performing as a bridge from research to product design. The toolkit consists of three parts that will be further explained in user guide.

THE FOCUS PYRAMID:
MULTIDISCIPLINARY COLLABORATION

The toolkit is designed based on a thesis research that explored the operation of the D@D team, and revealed a need for more focus. This toolkit addresses the bottom of the focus pyramid, and aims to align the team on goals and potential impact. At the end of this manual you can find a roadmap for the toolkit, and next steps to address the top parts of the pyramid



The three parts of the kit

1

IMPACT SQUARES

A card deck that represents the team goals and potential impact, co-created with the team



2

EVALUATION SESSION

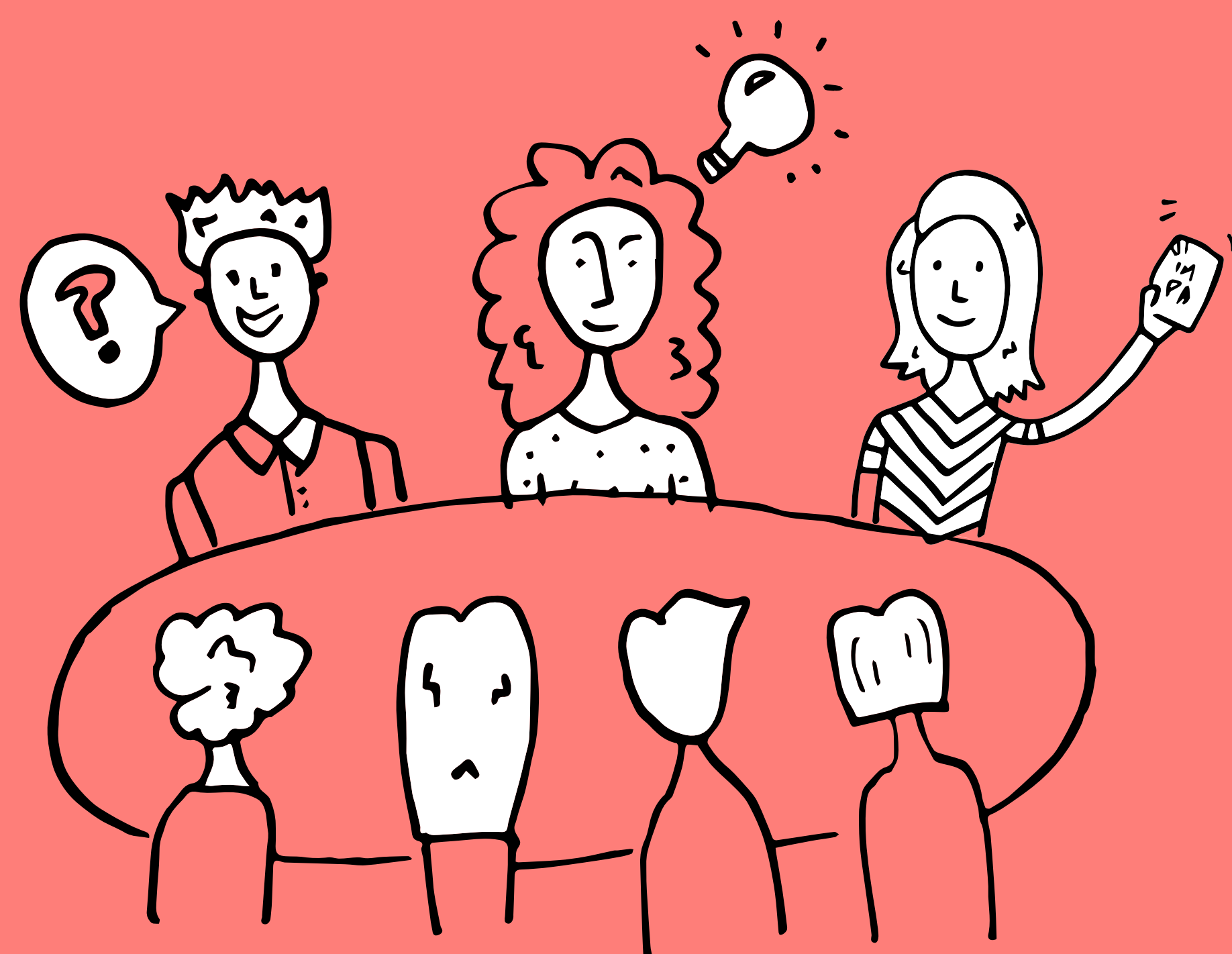
A structured session to evaluate and compare opportunities as a team



3

TEAM IMPACT WORKSHOP

A structured session that can be done every quarter to re-evaluate team goals and reflect on progress



THE D@D IMPACT KIT

#1 - The impact squares

The first part of the D@D impact toolkit is the impact squares: A card deck that contains 36 cards that represents the team goals and potential impact

The cards content is based on three sources:

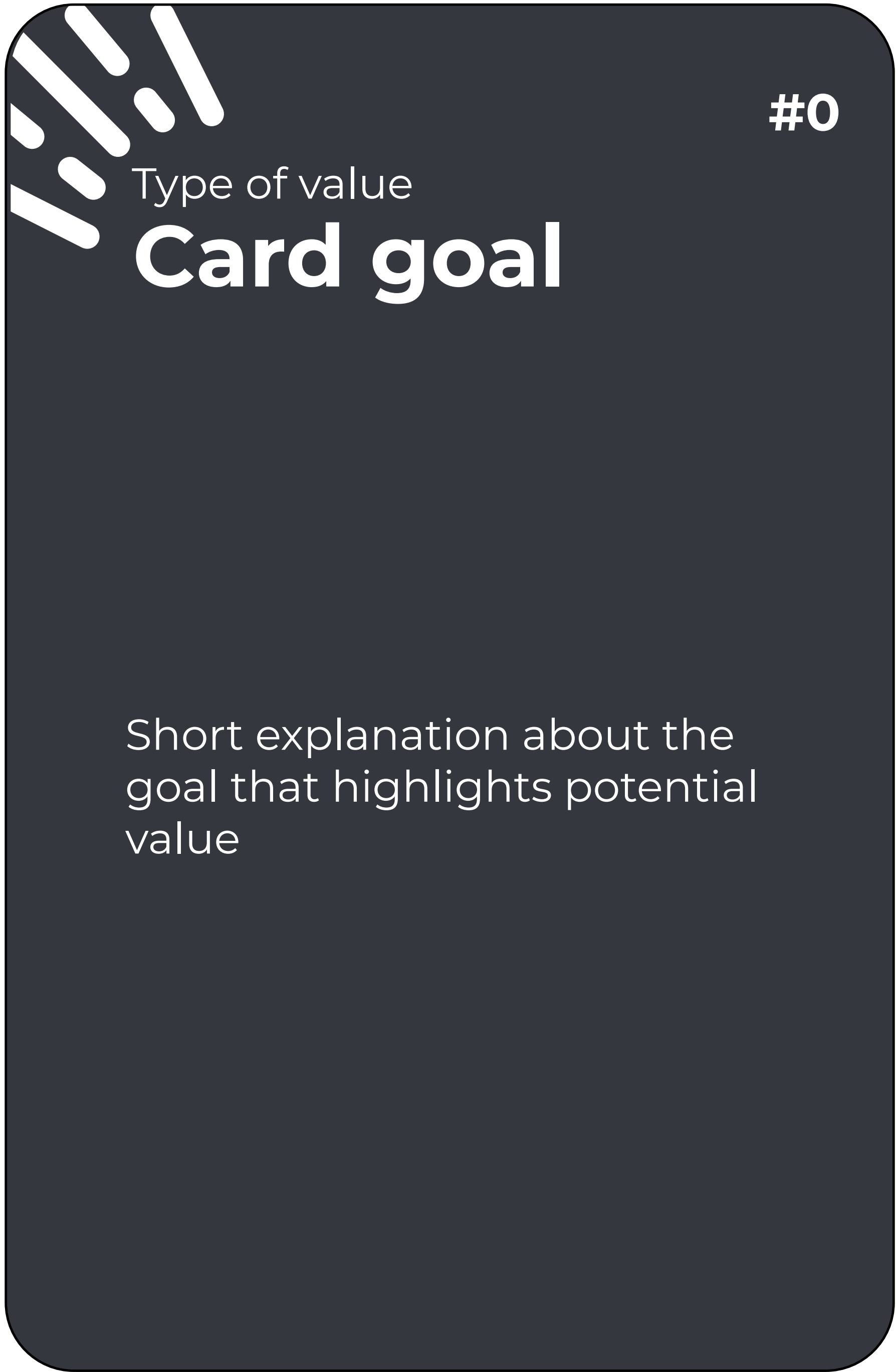
- Co-creation with the D@D team
- Strategic input from team leads
- Literature and trends for employee experience for 2020, including information collected from Deloitte Human Resources and Human Capital



#1 impact squares

The cards

The cards have three colours indicating different types of impact. The front side of each card explains the goal and its relevance. The back side of each card contains a call to action, a creative activity, point for discussion, more information etc



ORANGE CARDS

Employee experience values the team wants to impact. Inspired current trends, human capital reports and industry shifts

GREEN CARDS

Team business goals of the team. This can include anything that has a business impact for the stakeholders, the company, employees or clients

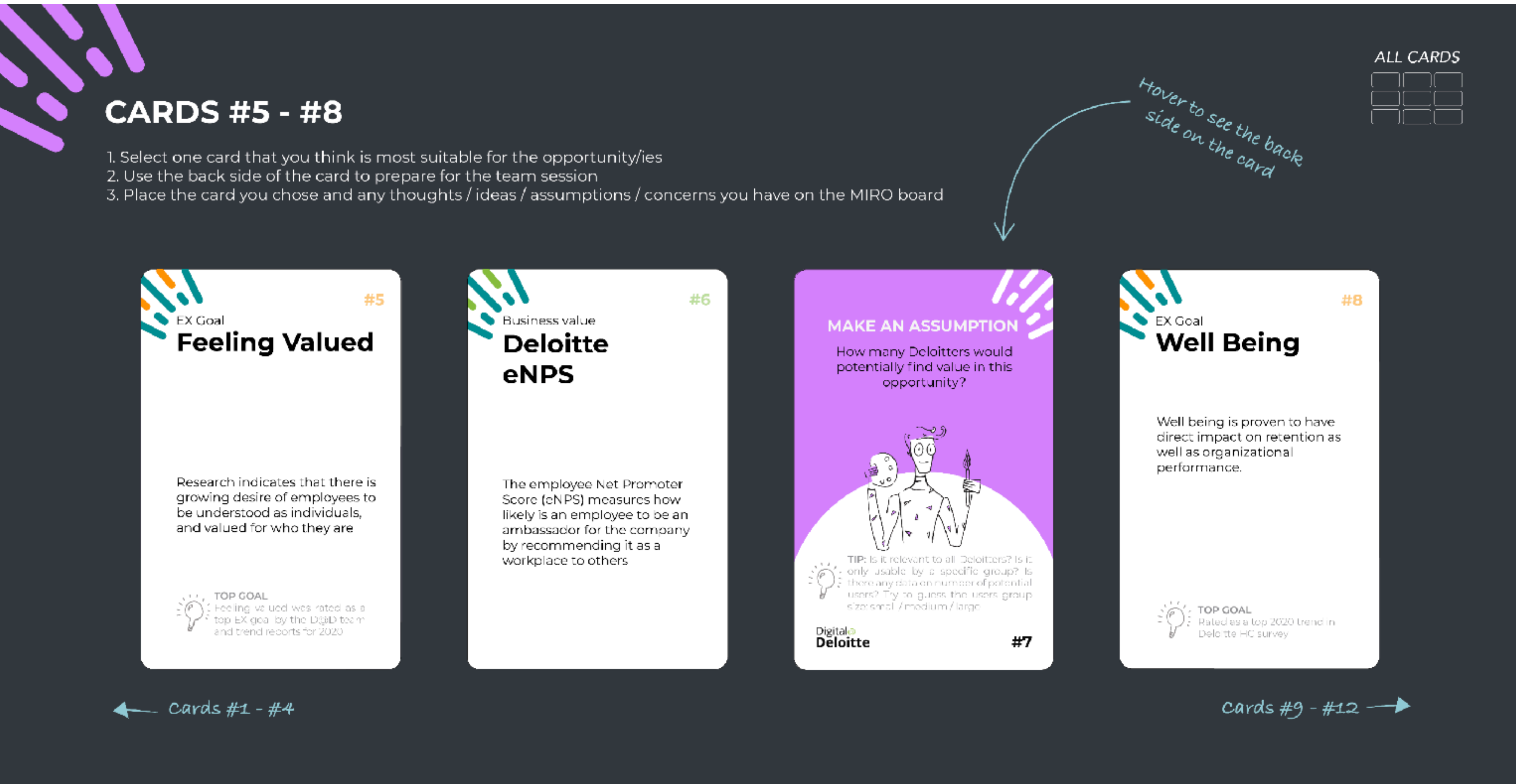
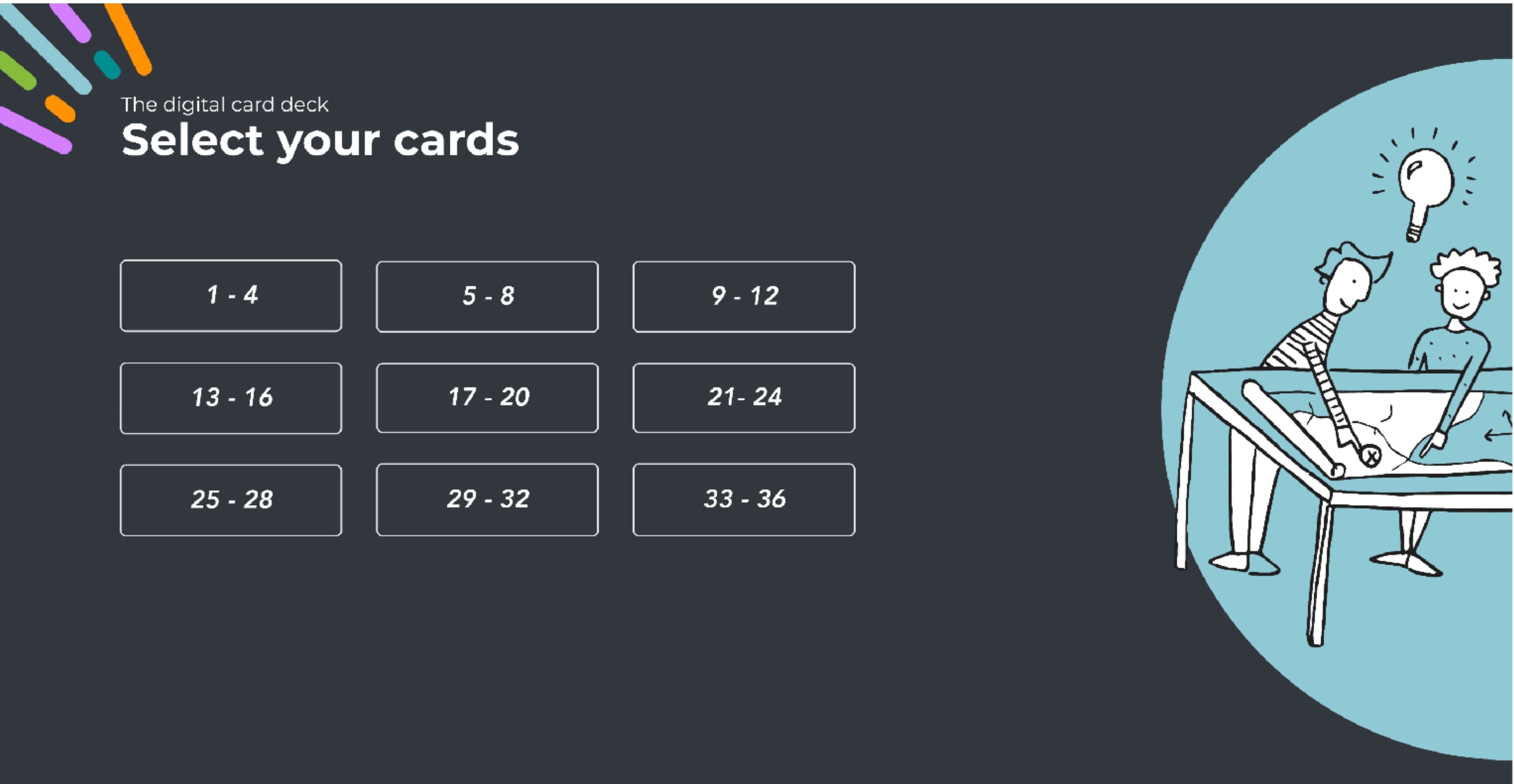


PURPLE CARDS

Goals that are related to the team and the way it collaborates, communicates and creates. Milestones the team wants to achieve in the short and long term

#1 impact squares

The digital card deck



Impact squares | InVision

The toolkit was designed to fit remote work. Therefore a digital version of the card deck was created and can be accessed in desktop via this link: <https://invis.io/3RQ4E65UBYP>



The InVision prototype enables to flip through the cards in groups of four. When hovering on the front side of the card, the back of it is revealed. The first page of the prototype enables navigation based on card number, to ensure fast and easy tracking of cards

THE D@D IMPACT KIT

#2 - Evaluation session



#2 Evaluation session

The workshop

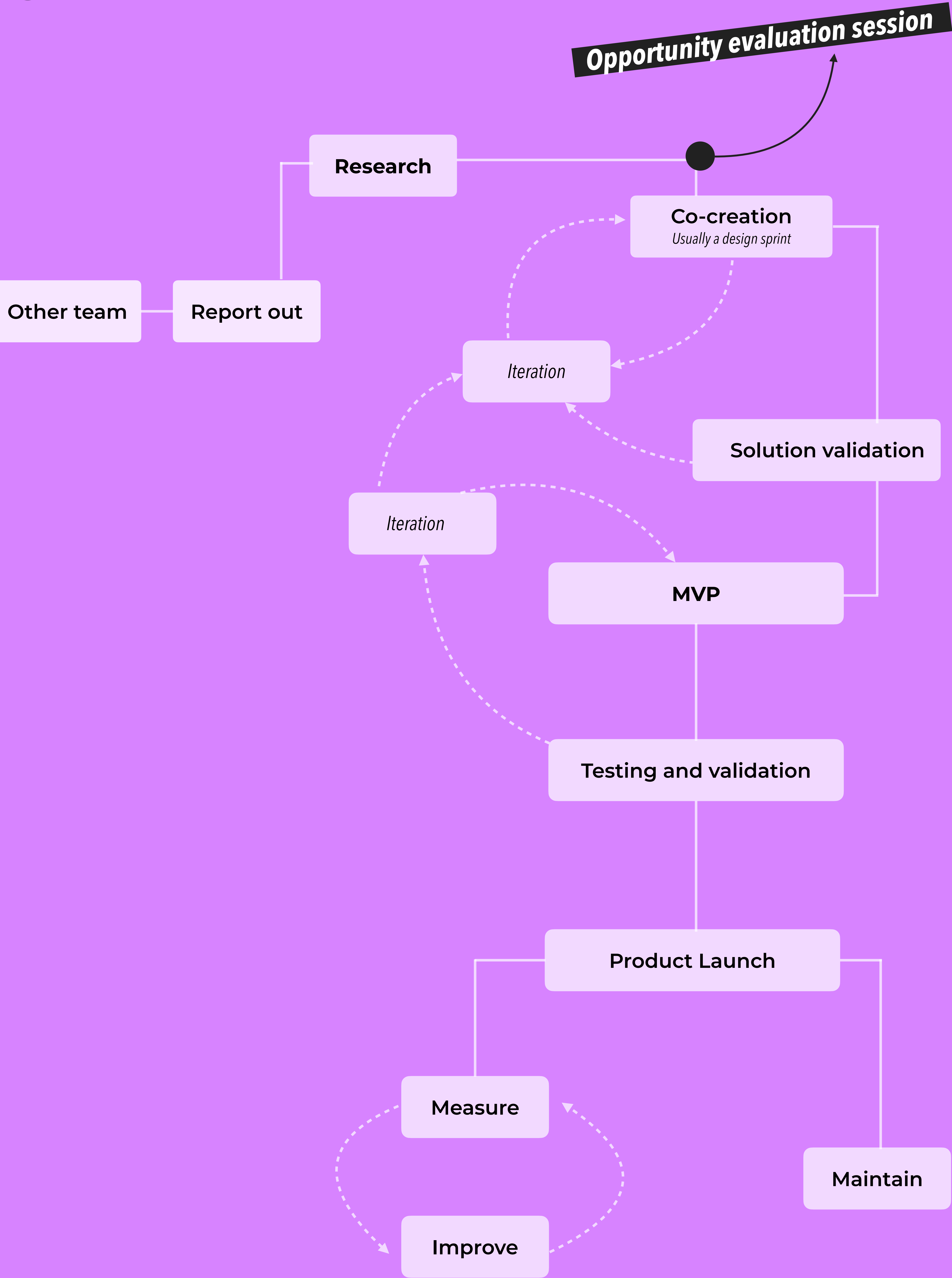
The evaluation session is a team workshop designed to create alignment and focus. Using the impact cards from the toolkit, the team will discuss and compare design opportunities that emerged from research



The session will be used to evaluate and compare the potential impact of each opportunity. The main goals of the session are to increase focus by aligning on goals and facilitating a democratic team discussion and decision. This session will take place in the transition from research to product and will attempt to perform as a bridge to reduce friction and improve the collaborative process.

D@D team workflow

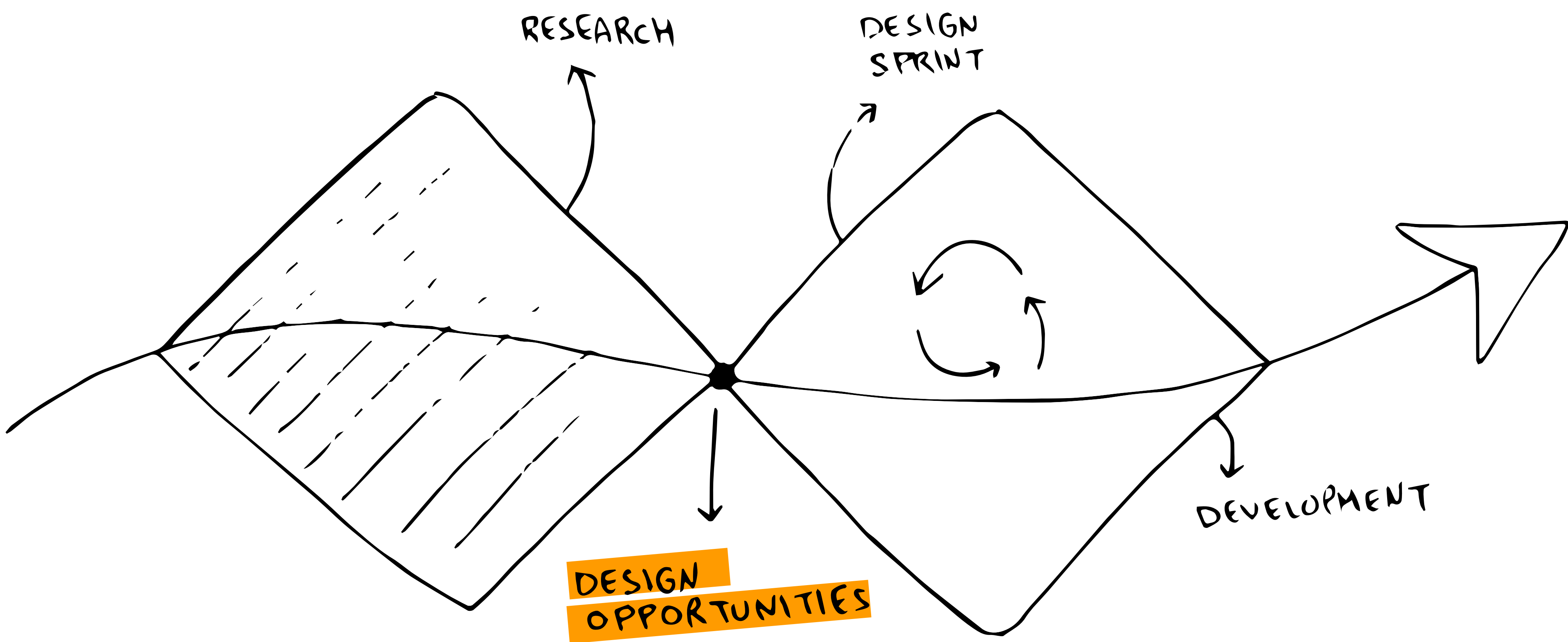
Overview



#2 Evaluation session

The workshop

The Digital@Deloitte team follows the double diamond method to produce innovation. In the first diamond, the Service Designers conduct user centred research in order to identify desirable business opportunities



The evaluation session will take place in the transition between the two diamonds, based on the opportunities identified in research and prior to the co-creation session that initiates the second diamond. The session will aim to improve the transition from Service Design activities to the Scrum activities, and perform as preparation for a design sprint.

#2 Evaluation session

Session overview

Remote session | Miro

The session was designed to be facilitated remotely via Miro collaborative white board and the digital card deck



PARTICIPANTS

The full Digital@Deloitte team

FACILITATION

The session will be facilitated and organised by the Product Owner:

- In order to enable the full team to perform as one entity, and reduce silos
- To represent the strategic business perspective
- Should have facilitation skills

LOCATION

Remotely, using Zoom, Miro and InVision

DURATION

Approximately 2-3 hours, depending on number of opportunities and availability

RULES

- The team should be familiar with the opportunities prior to session
- Each session can include a 1-3 opportunities for evaluation
- Each opportunity should include a maximum of 12 cards, and at least 2 from each colour

#2 Evaluation session

Story Board

This section of the user guide will provide a high-level overview of the workshop. It will describe the steps and activities that will be performed in the session. Page 20 will provide a facilitation checklist that includes detailed information about each activity, how it should be executed, timings, tools, Miro board, tips and examples

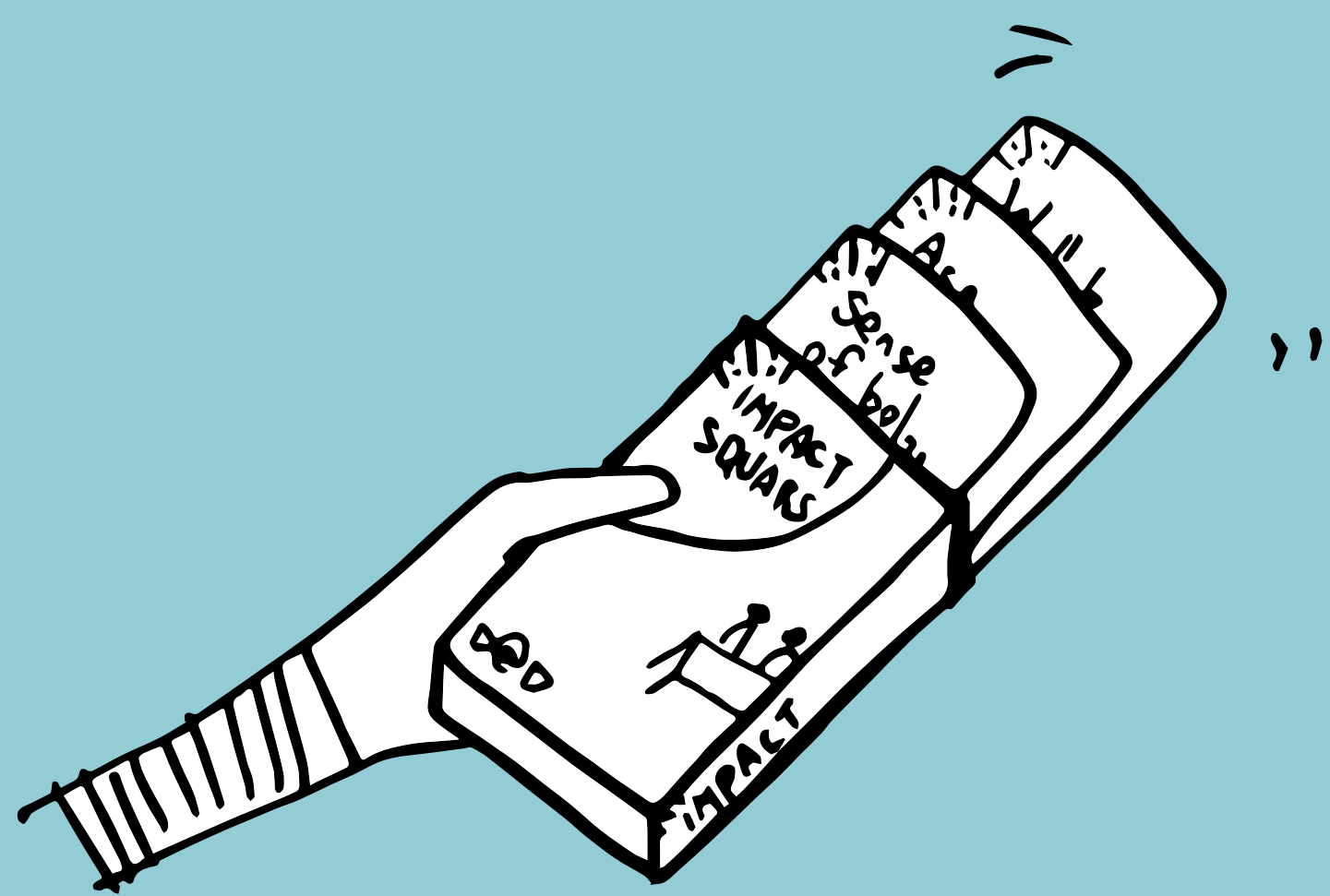


#0 | Team becomes familiar with design opportunities

The team should have sufficient time to become familiar with the research output and opportunities. That would also enable the SD to participate in the session with the team. Opportunities should be on the wall during the session.

#2 Evaluation session

Story Board



#1 | Get cards

Each team member is assigned to 4 cards and can find them according to number in the Digital card-deck



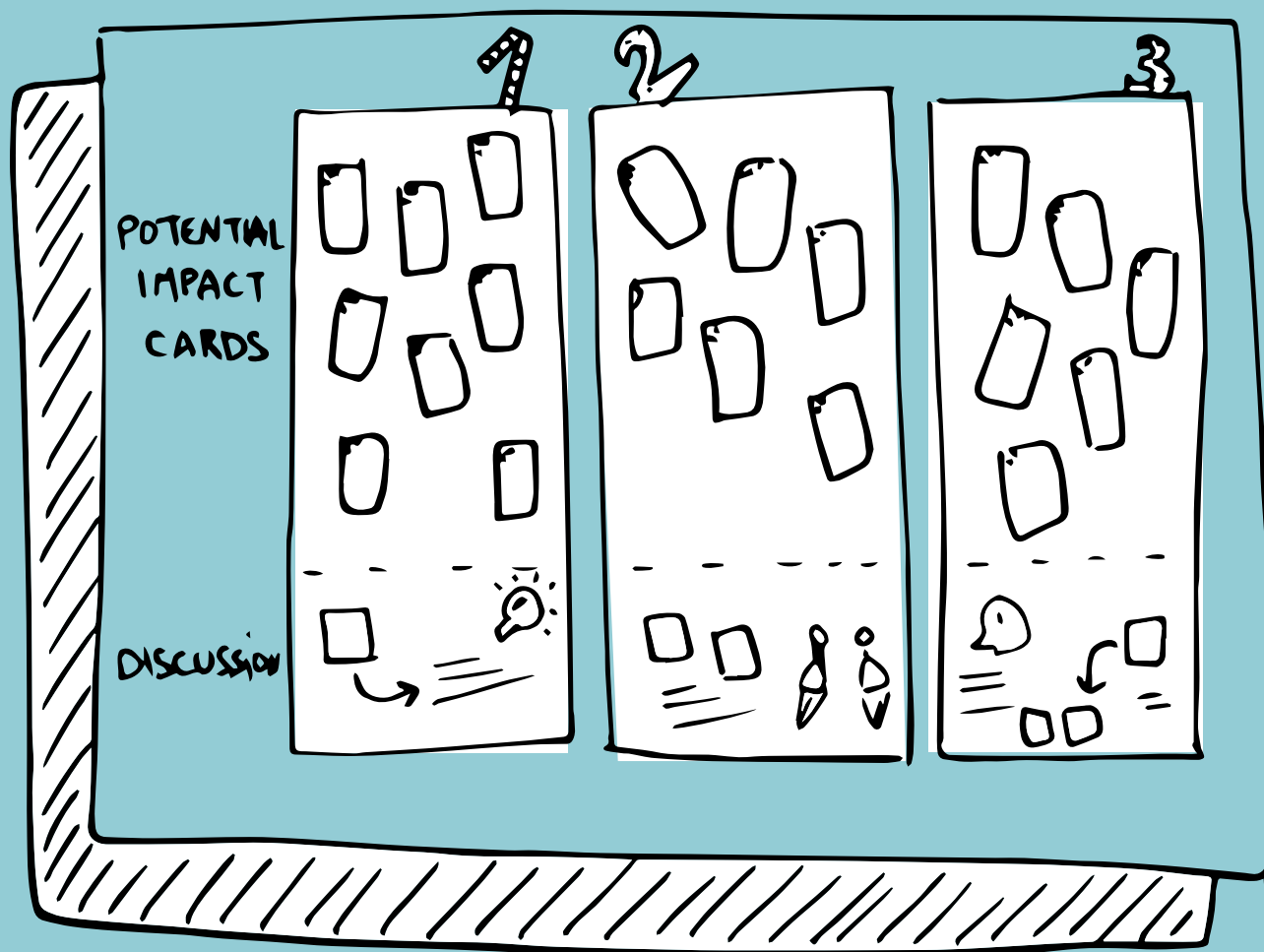
#2 | Explore and select

Participants should choose 1 out of the 4 cards that is most suitable for each opportunity, and use the back part of the card to prepare for the discussion



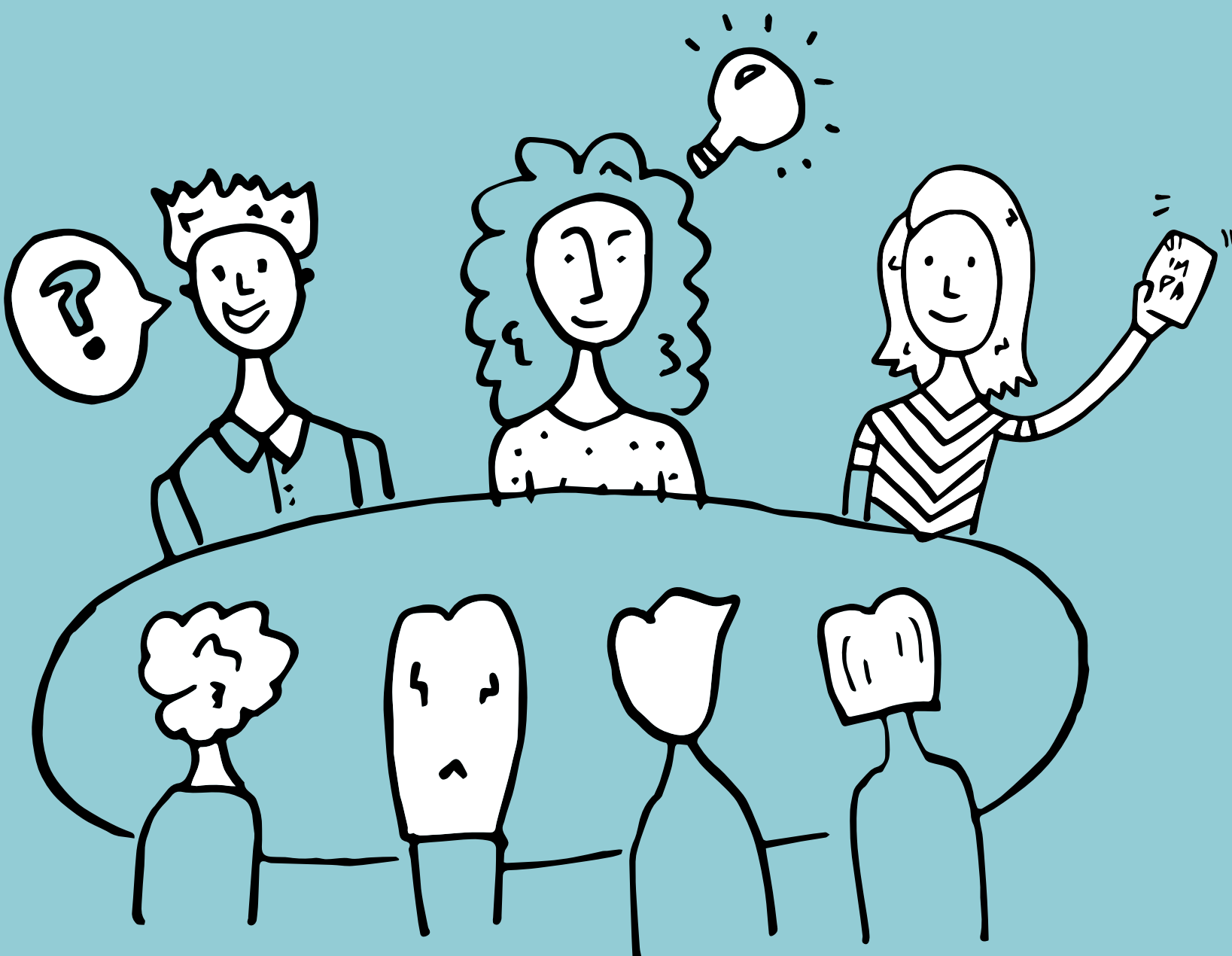
#3 | Present and discuss

Each participant presents his card and the team discussed the relevance of it to the opportunity, using the back side of the card



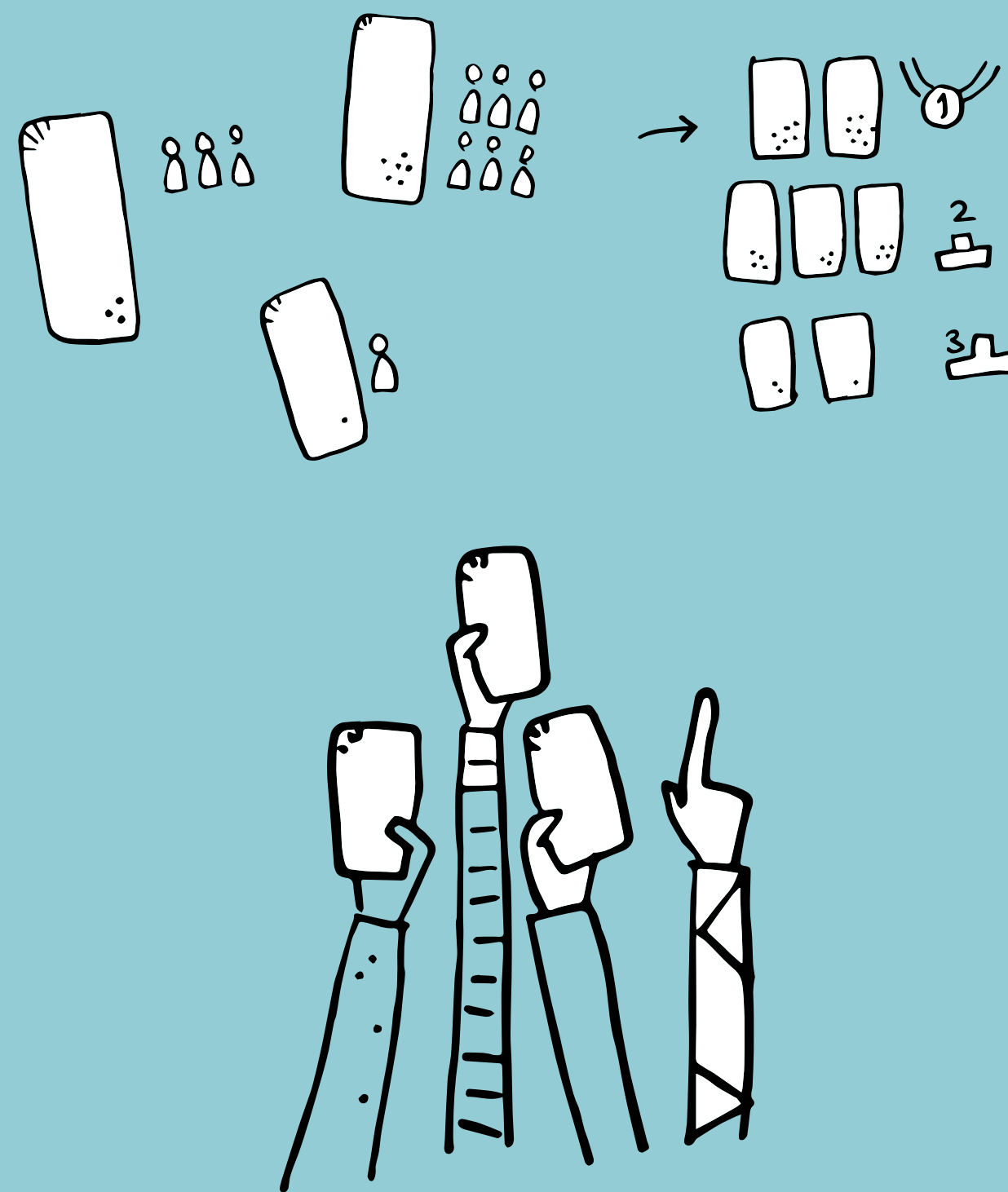
#4 | Capture insights

The facilitator places the chosen cards next to the relevant opportunities. At the bottom of each opportunity are assumptions, concerns or ideas discussed by the team during the session



#5 | Decide on final cards

The team can select up to three additional cards to add to the each opportunity. Eventually, each opportunity must have at least 2 cards of each colour



#6 | Vote

The team votes on the different cards for each opportunity. When they are done, the facilitator removes the cards that were not voted for and reorganises the cards according to priorities

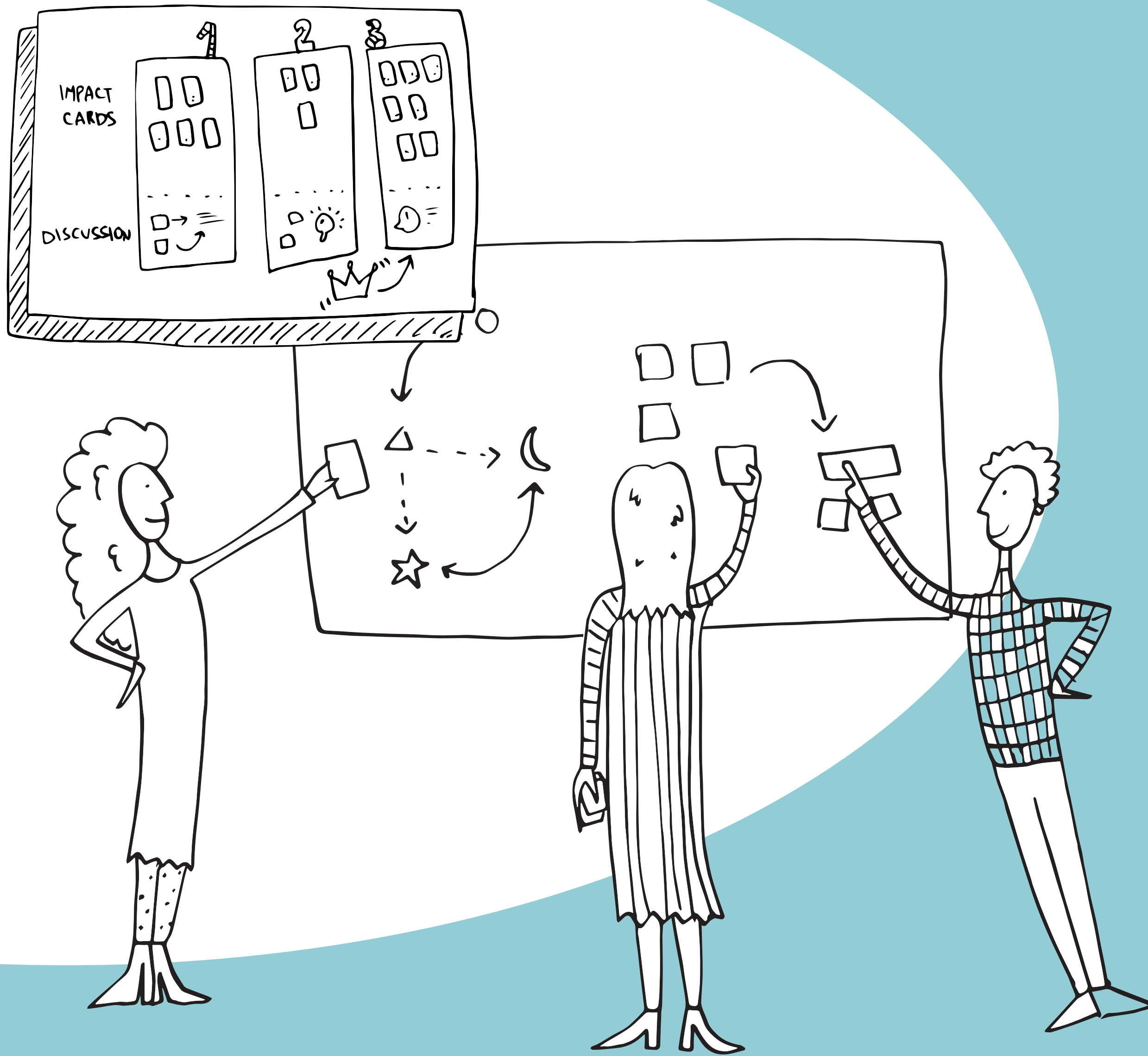
Step #7 \ Session outcome

The opportunity DNA

#7 | Evaluate opportunities

The outcome is a DNA of each opportunity, containing its potential impact, possible ideas, assumptions and concerns that were raised in discussion

- Based on it, the team can make a selection on which opportunity they want to continue to a design sprint
- The DNA opportunity can be used in the co-creation session, to create a long term vision on the impact of the goal



#2 Evaluation session

Facilitation checklist

- ✓ Schedule 2-3 hours for the entire team, depending on amount of opportunities to be evaluated, and include a Zoom link
- ✓ Make sure the team is familiar with the opportunities that will be discussed
- ✓ Deal cards and ask team to prepare prior to the session
 - The digital deck divides the cards into groups of 4, according to 9 team members participating. Decide which team member gets which 4 cards and let them know prior to session
 - Participants can access the InVision digital deck via desktop: <https://invis.io/3RQ4E65UBYP>
 - Depending on availability, this is not a mandatory step but can save time during the session and improve the quality of outcomes
- ✓ Check and adjust the Miro board
 - Access the board via: https://miro.com/app/board/o9J_kn3y_HU=/
 - All yellow sections in the boards are comments for the facilitator and placeholders, make sure to insert the relevant opportunities, and delete examples and explanations prior to session
 - Add team members to board (alternatively, send them a link to join when the session begins)
 - Make sure the board is set, and the cards that appear in the frames are the most recent ones
- ✓ For the session you will need:
 - A timer (included in some Miro accounts)
 - Zoom and Miro accounts
 - All team members (the session is designed to align the team, therefore not including all members will be counter productive)

MIRO Collaborative board

The session structure

The Miro board is fully designed for the session including instructions next to each frame to explain the process. It contains five sections:

1. Introduction to session
 - An explanation about the session itself
 - Agenda (Edit hours to align with current session)
2. Introduction opportunity and digital card deck
 - Insert the relevant opportunity/ies
 - This area includes a link to InVision digital card deck
3. Workshop
 - All cards divided the same way as in InVision
 - A designated area for team discussion
4. Opportunity DNA - Session outcome
 - A template for the opportunity evaluation
 - An example of a possible outcome
 - Voting dots and Post-its
5. Feedback area



#2 Quarterly goal workshop

Facilitation guidelines

1 | Get cards *Approx 5 minutes*

- Each team member receives four cards and can access them via the digital deck according to their numbers (see Digital card deck)
- Preferably this step will be done prior to session

2 | Explore and select *Approx 10-15 minutes*

- For each opportunity, participants should select 1 out of the 4 cards that is most suitable
- Each participant should use the back part of the selected card to prepare for the session
- Team members copy the selected card from the Miro board and place it next to the opportunity

3 | Present & discuss *27 minutes per opportunity (27 - 81 min)*

- Team members take turns presenting their selected card and explaining their thoughts based on the back side of it
- 3 minutes per card: For each card use a timer and have a quick team discussion
- At the end of this step, there will be 9 cards per opportunity

4 | Capture insights *Included in step 3*

- During the discussion, capture insights from discussion on the posits next to each card
- The facilitator may also decide to assign someone to be the "note taker"
- TIP: Try to keep the discussion as open as possible, quantity over quality, don't consider viability to feasibility as this point

5 | Decide on cards as a team *5 minutes per opportunity (5 - 15 min)*

- For each opportunity, the team can select up to 3 additional cards from the whole deck
- Remind the team of the rules:
 - Each opportunity must have at least 2 cards from each colour
 - There can't be more than 12 cards per opportunity

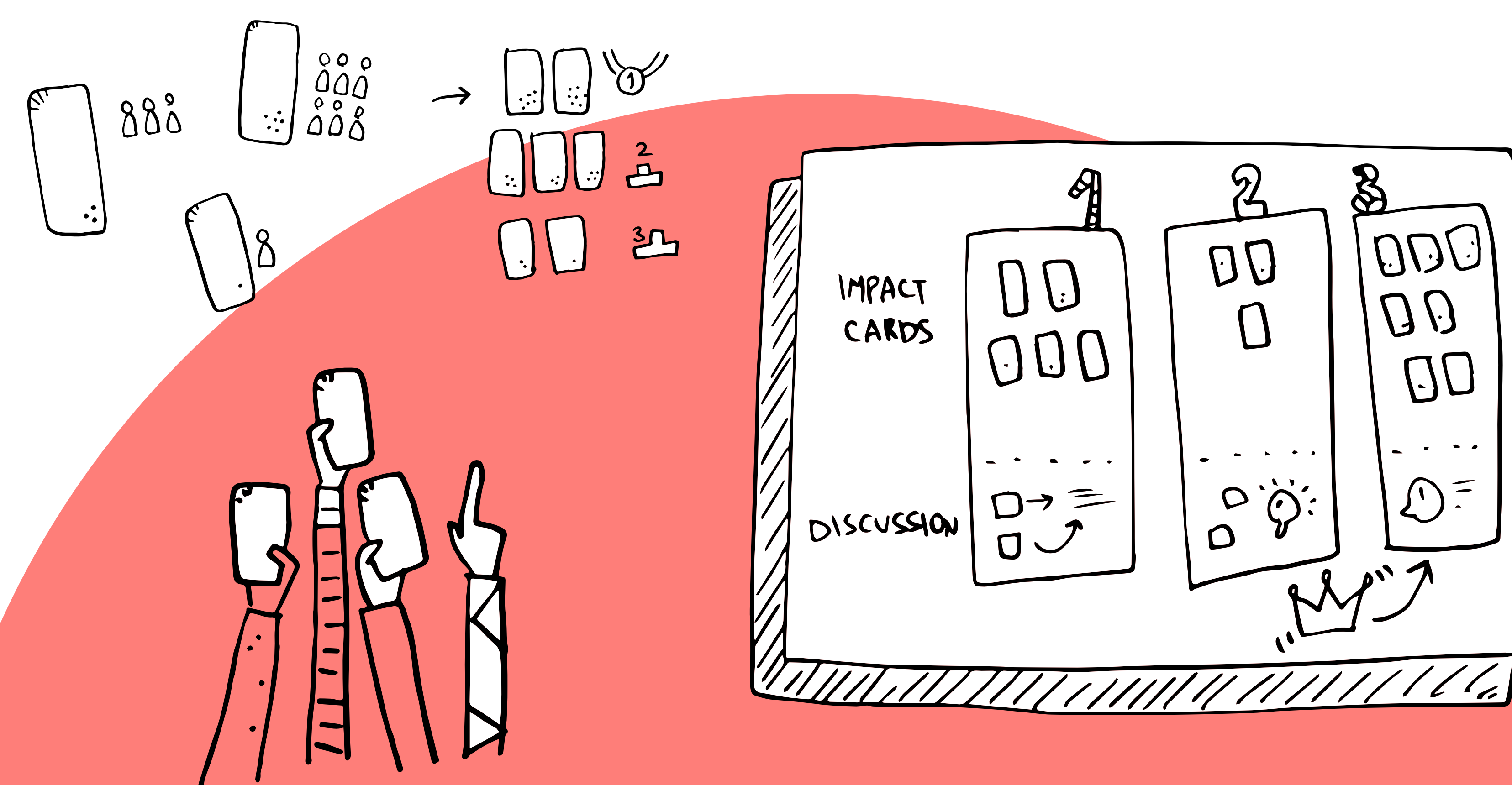
6 | Vote *3 minutes per opportunity (3-9 min)*

- Copy-paste the cards selected per opportunity into the DNA frame at the bottom of the screen
- The voting will take place there and help create focus on the most relevant impact of each opportunity
- Using 6 dots per opportunity, the team votes on the different cards
- After they are done, remove the cards that were not voted for and reorganises the cards according to number of votes, like an upside-down pyramid: most voted for cards are on top

Step #7 | Evaluate opportunities

The opportunity DNA

- Using the bottom part of the DNA template, capture the most valuable ideas, assumptions and concerns that were raised in discussion for each opportunity
- Preferably, this will be done with the team. If there isn't sufficient time, it can also be done after the session
- Discuss potential impact of each opportunity with the team. If there are multiple opportunities, ask the team to make a selection on which opportunity they want to continue to a design sprint based on the analysis
- Mark the 'winning' opportunity
- The DNA opportunity can be used in the co-creation session, to create a long term vision on the impact of the goal



THE D@D IMPACT KIT

#3 - Quarterly goal workshop



Part three

Goal alignment session

WHAT

The goal alignment session is a structured team workshop designed to re-evaluate goals and reflect on progress. The session would enable the team to evaluate and co-create the impact cards, and discuss their collaborative process and future vision

WHEN

The session can be done every quarter months to ensure constant relevance and team communication regarding impact and vision.

WHY

Research proved that discussing future goals as a team is valuable for the sense of purpose, vision and ownership. All of those are vital to maintain focus and perform at the desired pace



#3 Quarterly goal workshop

Session overview

Remote session | Miro

The session was designed to be facilitated remotely via Miro collaborative white board and the digital card deck



PARTICIPANTS

The full Digital@Deloitte team

FACILITATION

The session will be facilitated and organised by the Product Owner:

- In order to enable the full team to perform as one entity, and reduce silos
- To represent the strategic business perspective
- Should have facilitation skills

LOCATION

Remotely, using Zoom, Miro and InVision

DURATION

Approximately 1.5 hours, depending on availability

RULES

- New card ideas can be any of the three colours
- Make sure the new deck remains balanced
 - At least 10 cards of each colour
 - Not more than 14 cards of one colour
 - In total the deck should contain 30 - 40 cards
 - Maintain card numbers for future workshops

#3 Quarterly goal workshop

Story Board

This section of the user guide will provide a high-level overview of the workshop. It will describe the steps and activities that will be performed in the session. Page 30 will provide a facilitation checklist that includes detailed information about each activity, how it should be executed, timings, tools, Miro board, tips and examples

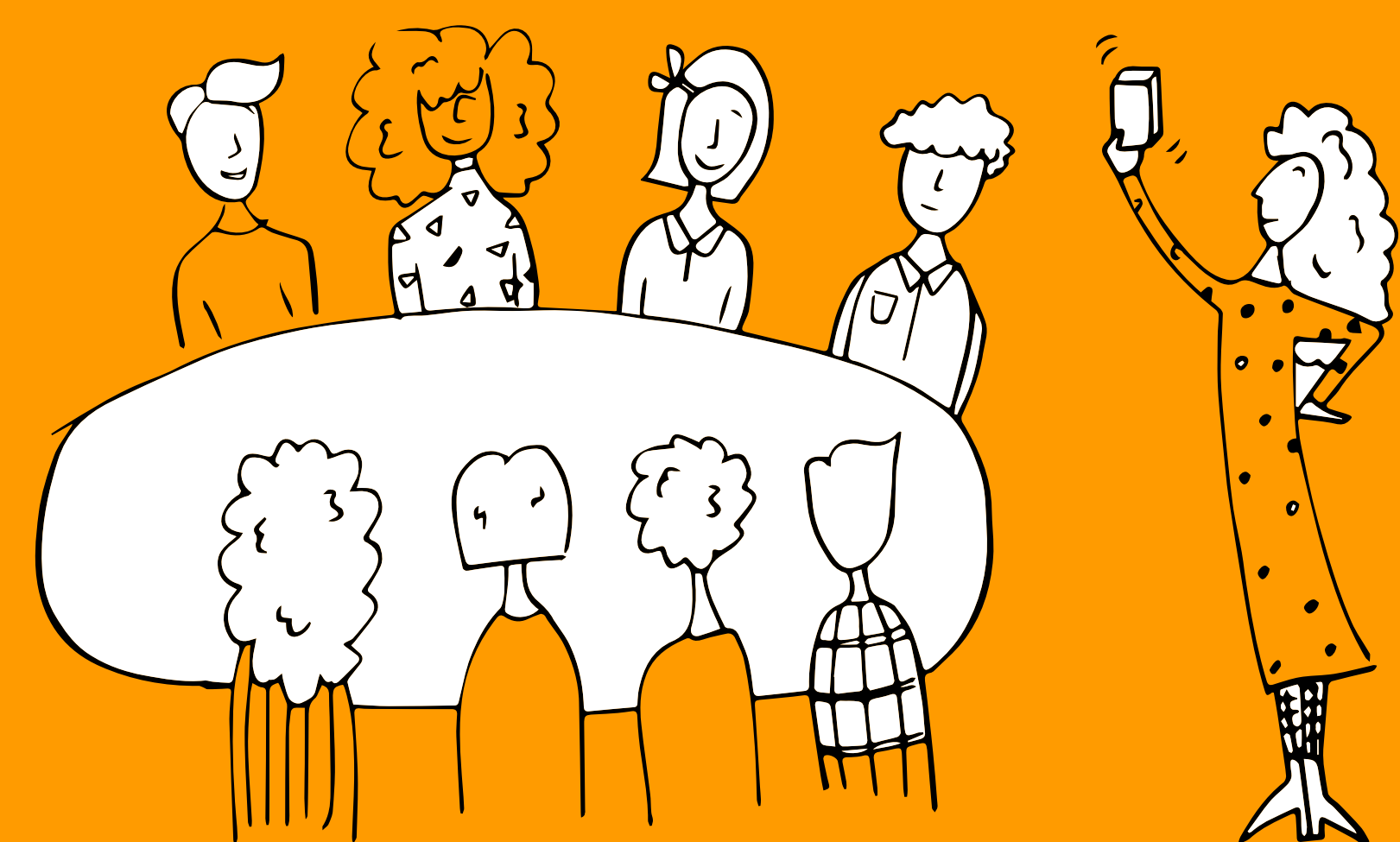


#0 | Each team member prepares 1-2 new card ideas prior to session

Each team member can search for inspiration based on trends, literature and industry reports in addition to reflecting on team short and term goals

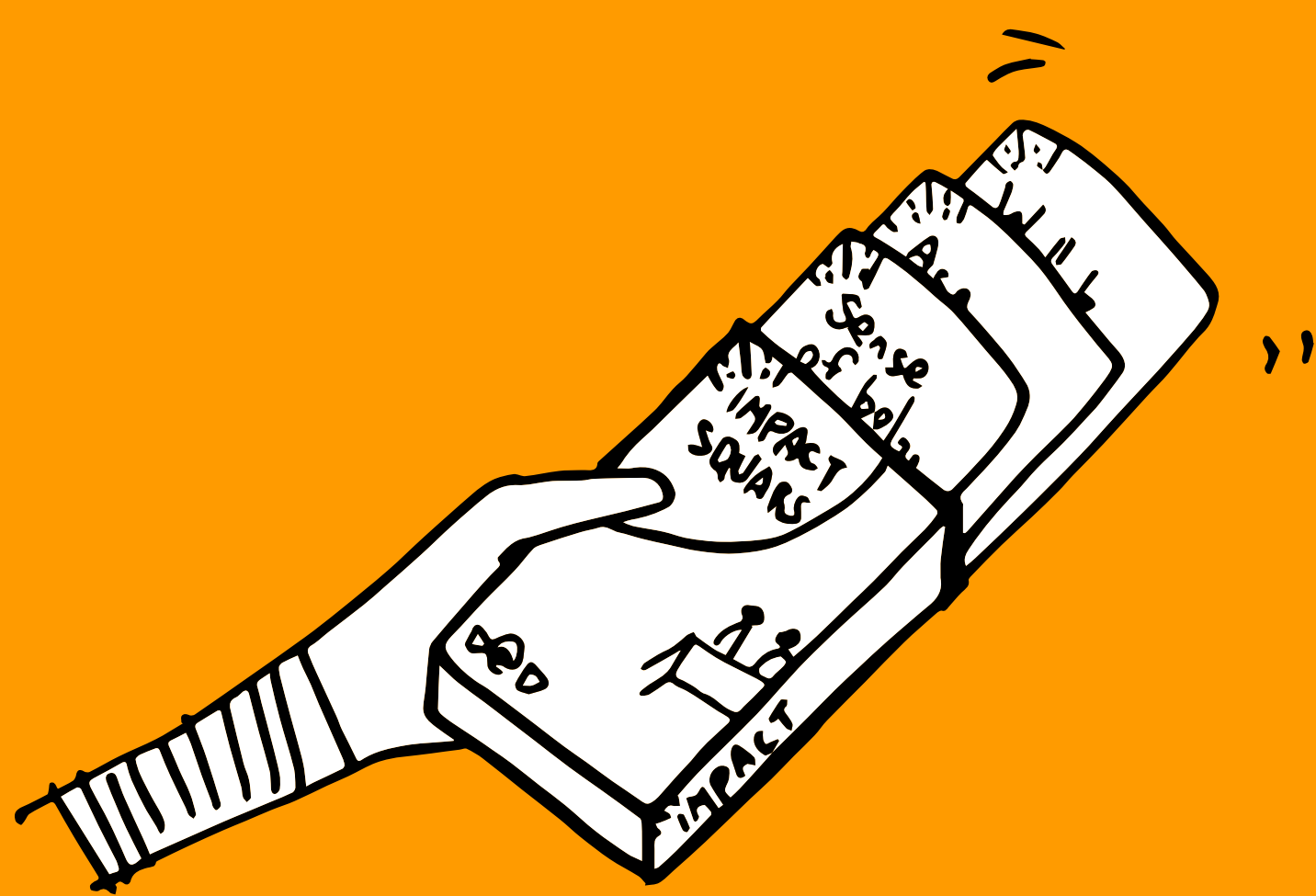
#3 Quarterly goal workshop

Story Board



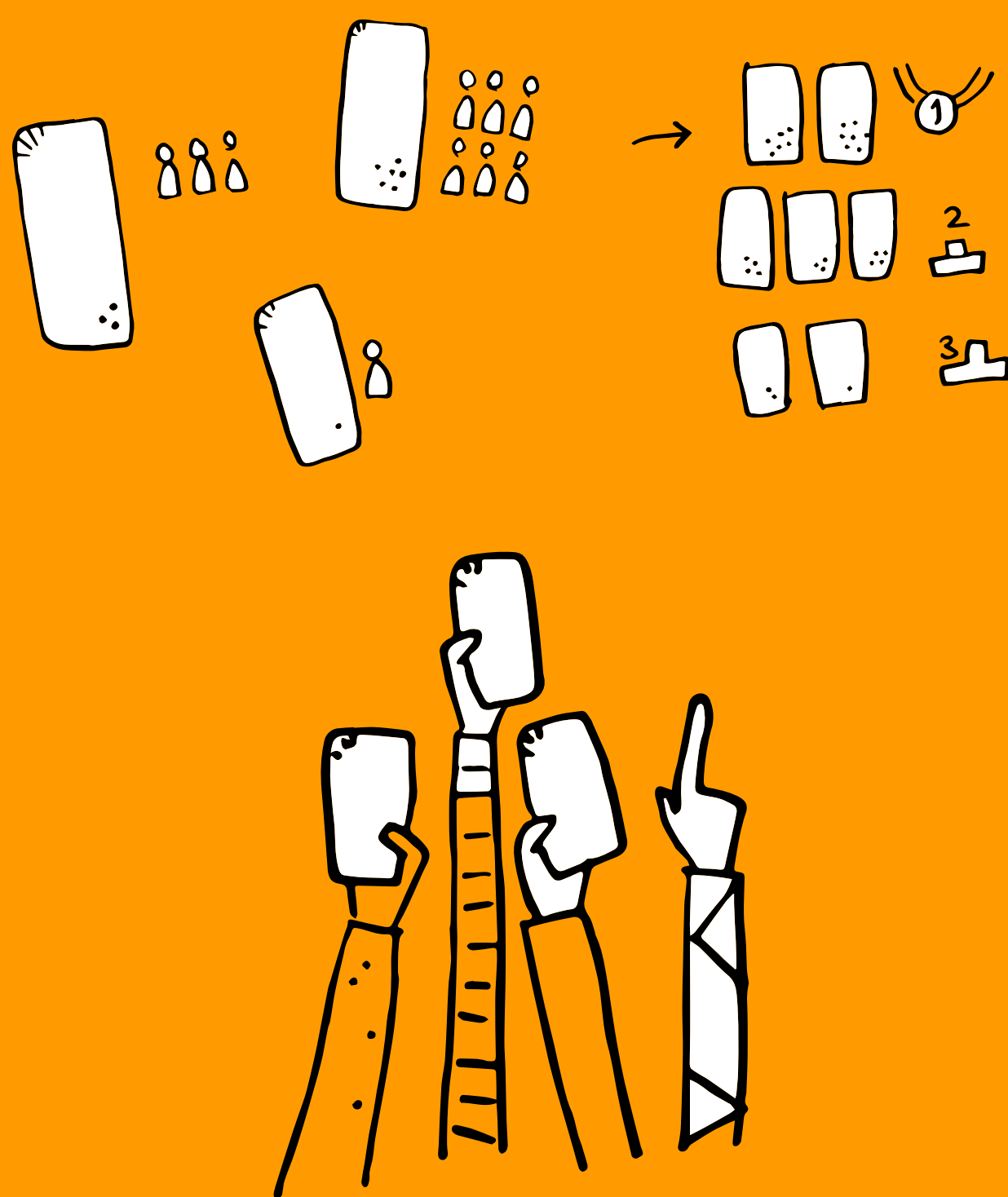
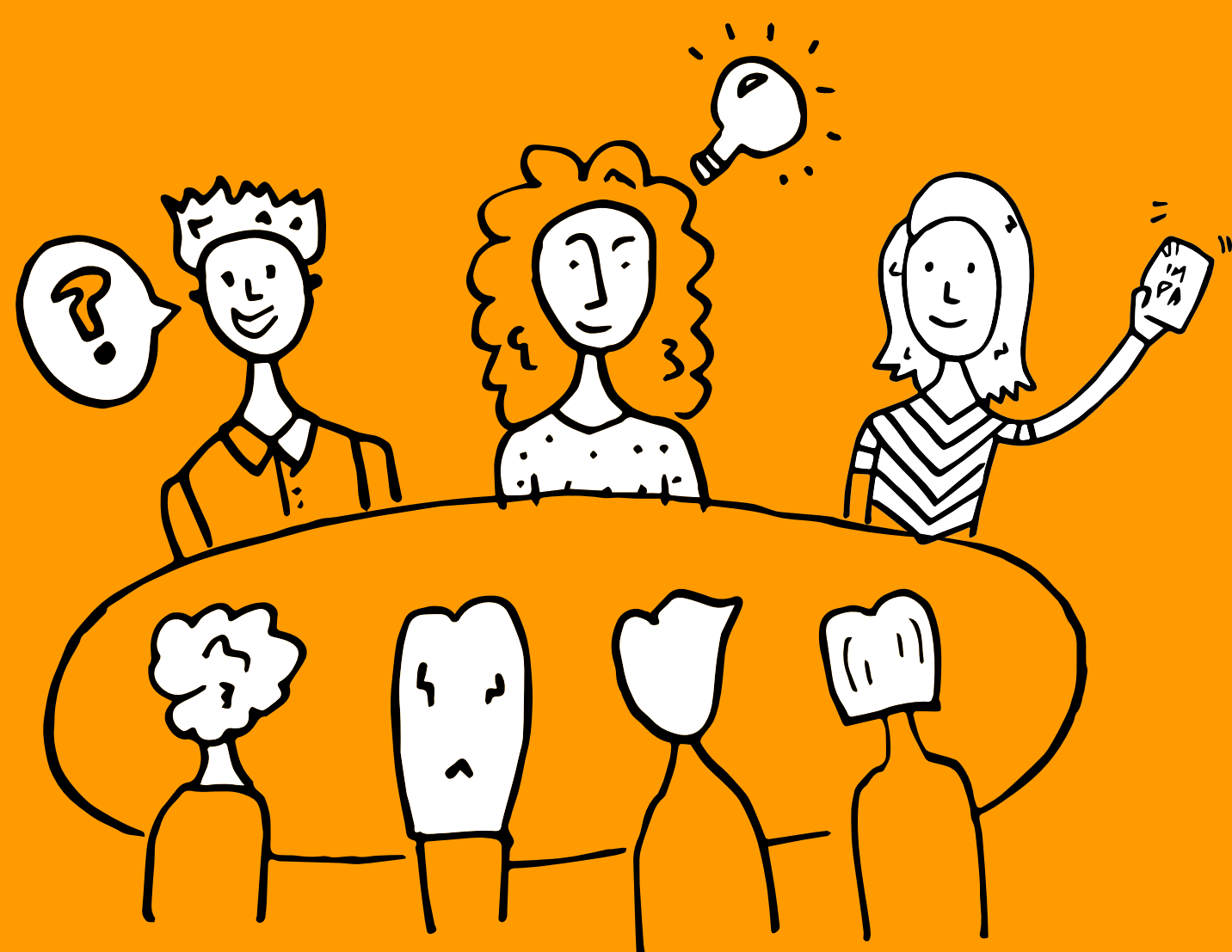
#1 | Reflect on existing cards

Did we accomplish any of the existing goals represented on cards? Are there goals we should focus on more? Are there any cards that seem irrelevant?



#2 | Remove or rephrase cards

As a team discuss whether some cards are no longer relevant or should be adjusted to fit with current goals. Vote to make a decision on cards that should be removed or rephrased



#3 | Present & discuss new card ideas

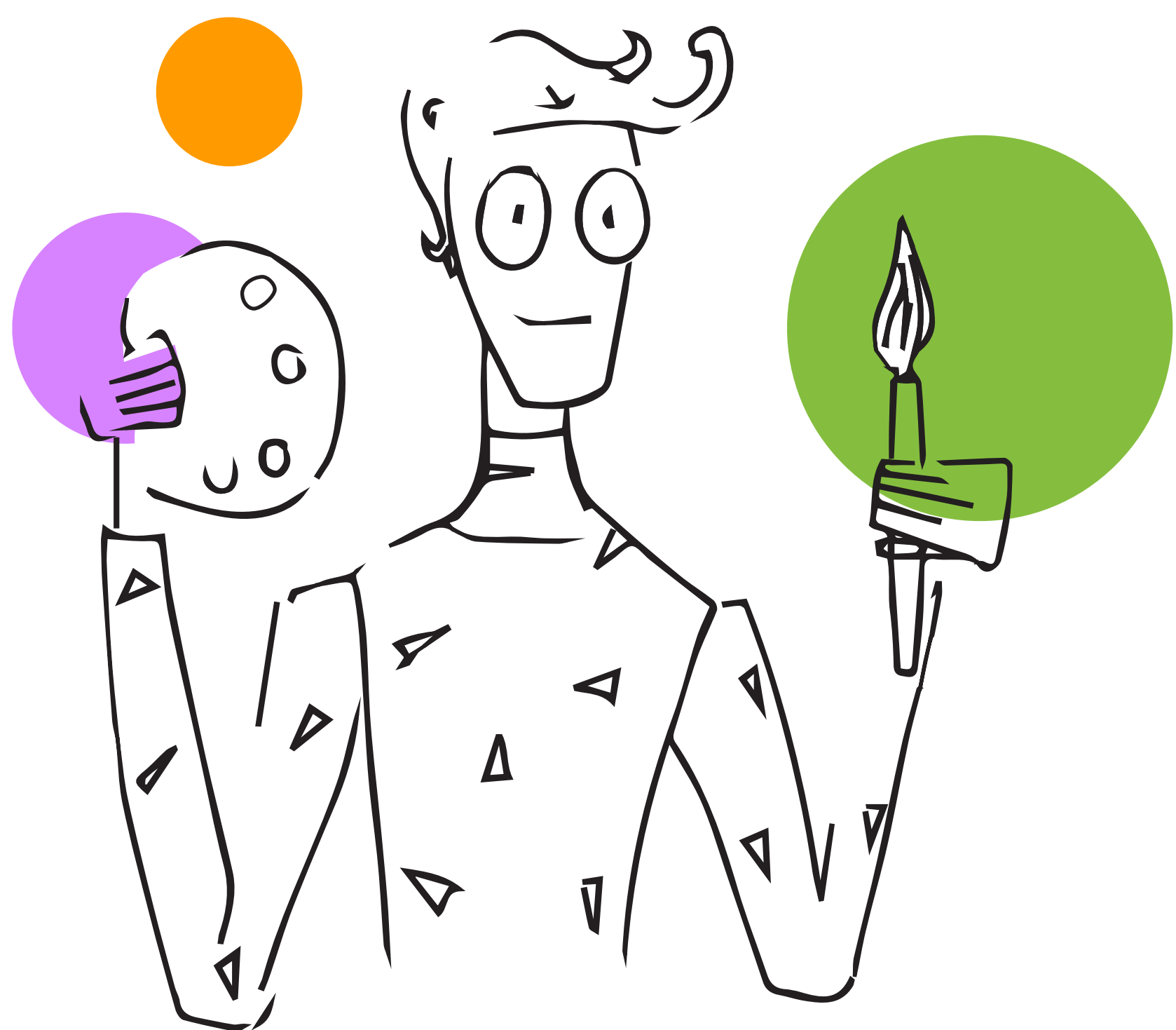
Can be written on posits, sketched, or in any format that can communicate the content. Team member take turns presenting their ideas

#4 | Discuss and vote

To add new cards, team members need to agree on new goals and targets. Vote on new potential cards that can be added to deck

Step #5 | Session outcome

The new card deck



THE NEW DECK

Based on the discussion and votes and following the session rules, adjust the existing card deck:

- Delete unnecessary cards
- Rephrase cards that should be adjusted
- Fill in new cards using templates



#3 Quarterly goal workshop

Facilitation checklist

- ✓ Schedule 1.5 hours for the entire team, and include a Zoom link
- ✓ Ask the team to prepare 1-2 new card ideas prior to session
 - Cards can be from any of the three colours
 - Ask team to scroll through the existing cards and reflect on short and long term goals (add the link to the digital card deck: <https://invis.io/3RQ4E65UBYP>)
 - Each team member can search for inspiration based on trends, literature and industry reports (aSee recommendations act the bottom)
 - Ideas can be brought to the session as posits, sketches, or in any format that can communicate the content
- ✓ Check the Miro board
 - Access the board via: https://miro.com/app/board/o9J_kn98rCQ=/
 - Add team members to board (alternatively, send them a link to join when the session begins)
 - Make sure the board is set, and the cards that appear in the frames are the most recent ones
- ✓ For the session you will need:
 - A timer (included in some Miro accounts)
 - Zoom and Miro accounts
 - All team members (the session is designed to align the team, therefore not including all members will be counter productive)

INSPIRATION SOURCES

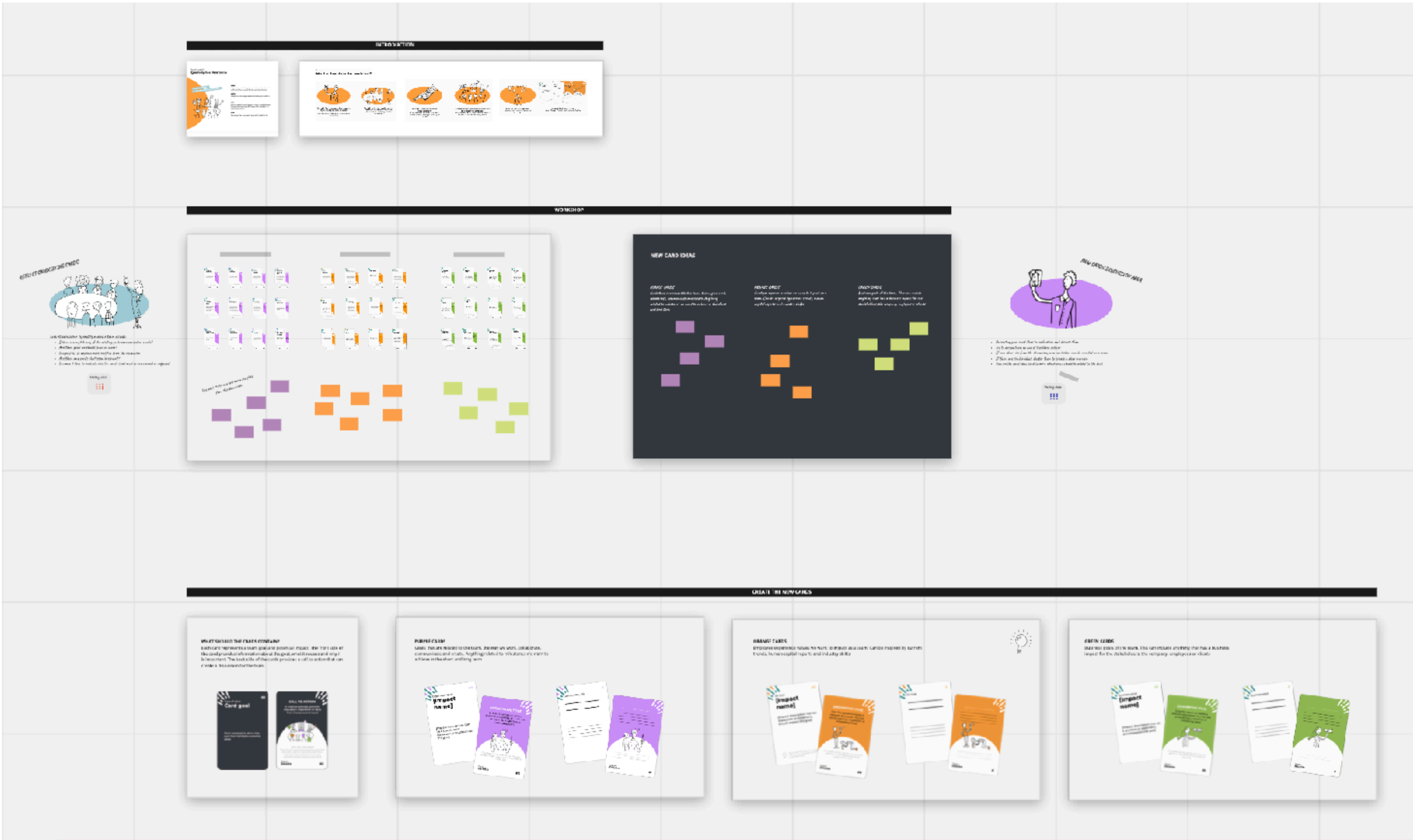
- | | |
|--|--|
| - Deloitte insights | - Harvard business review |
| - Deloitte human capital yearly trend report | - Medium |
| - Accenture Fjord yearly trend report | - She Ji: The Journal of Design, Economics, and Innovation |
| - McKinsey & Company | - TU Delft repository |

MIRO Collaborative board

The session structure

The Miro board is fully designed for the session and contains three sections:

1. Introduction to session
 - An explanation about the session itself
 - A story board explaining the different steps of the workshop
2. Workshop
 - All the cards organised by colour for the discussion
 - A designated area for team discussion on new cards
 - Voting dots and Post-its
 - Instructions next to each frame to explain the process
3. Card design area
 - Blank cards from all three colours
 - Template cards explaining the content needed on each card



#3 Quarterly goal workshop

Facilitation guidelines

1 | Reflect on existing cards *Approx 15 minutes*

- Address cards of each colours separately (5 min per colour)
- Capture insights from discussion on the posits below
- The facilitator may also decide to assign someone to be the "note taker"
- Possible question: Did we accomplish any of the existing goals represented on cards?
- Possible question: Are there goals we should focus on more?
- Possible question: Are there any cards that seem irrelevant?

2 | Remove or rephrase cards *Approx 15 minutes*

- Facilitate a discussion on which cards should be adjusted or removed
- Ask the team to vote using 3 red dots each
- Each team member can decide how to use their dots: Place one on each card, place all on one card or not vote at all

3 | Present & discuss new card ideas *Approx 30 - 45 minutes*

- Team members take turns presenting their new card idea (3 min per card)
- For each card use a timer and have a quick team discussion

4 | Discuss and vote on new cards *Approx 15 minutes*

- Facilitate a team discussion on the new cards and their value
- Assign them to one of the three colours
- If new ideas rise from the discussion, new card ideas can be created as a team
- If there are similar ideas, cluster them to create a clear overview
- Remind the team of the rules, so they can consider them before they vote
- Ask team to vote on the card ideas to determine which ones should be added to the deck, using 3 dots each in the same method as before

Step #5 | Session outcome

The new card deck

THE NEW DECK

Based on the discussion and votes and following the session rules, adjust the existing card deck:

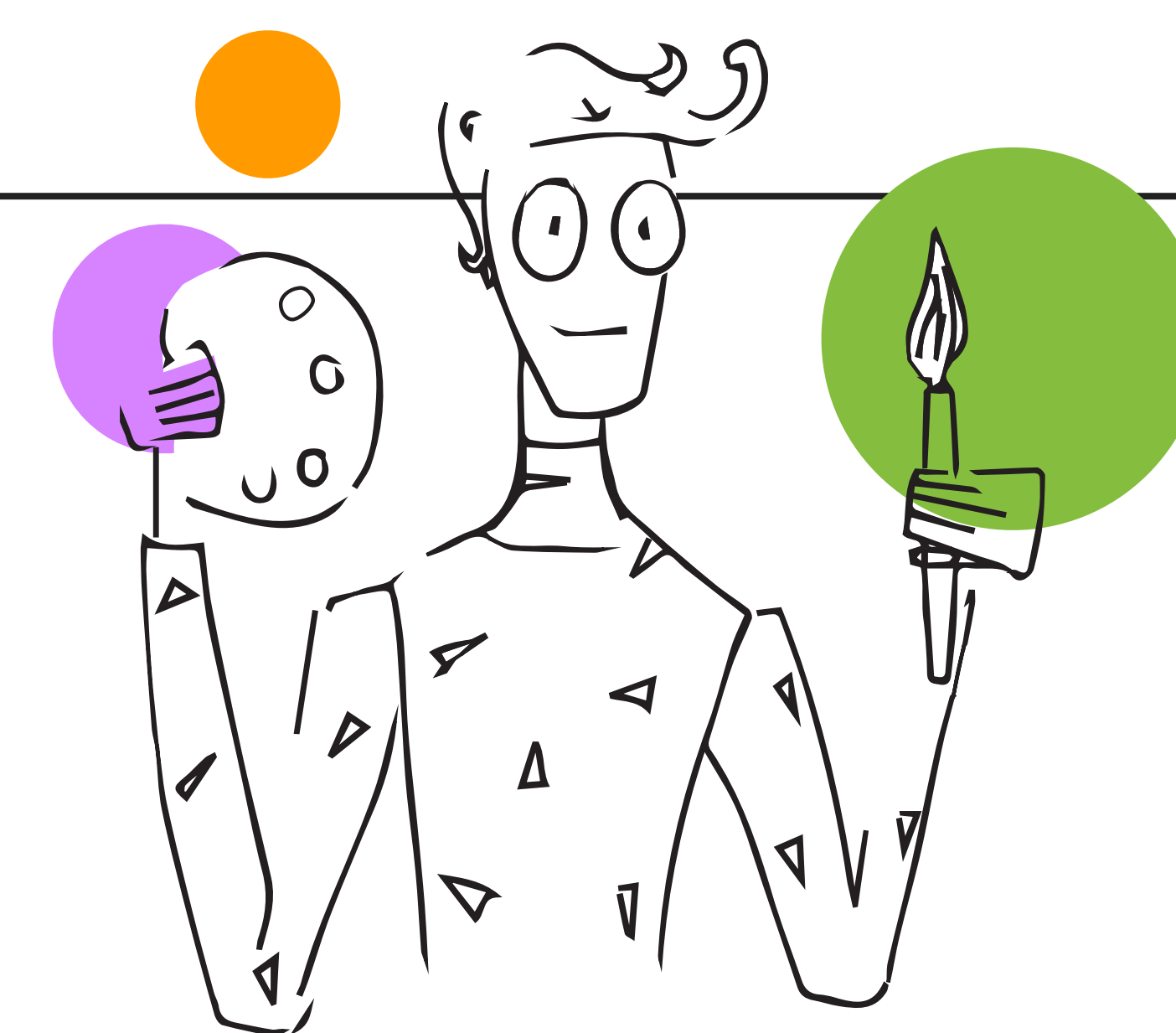
- Delete unnecessary cards
- Rephrase cards that should be adjusted
- Fill in new cards using templates: this can be done as a team, individually, small groups or pairs depending on time and number of new cards
- Use the blank cards to create new ones, and the templates to make sure the card structure is maintained

- AFTER THE SESSION:

- Edit the digital card deck in InVision to include all the changes
- Alternatively, use a new Miro board to contain all the cards, to save time

RULES | MAKE SURE THE CARD DECK IS BALANCED

- At least 10 cards of each colour
- Not more than 14 cards of one colour
- In total the deck should contain 30 - 40 cards
- Maintain card numbers for future workshops



Guidelines and tools

Remote facilitation

Collaborative board | Miro

Both sessions were designed to be facilitated remotely via Miro collaborative white board. Each session is prepared on Miro, including an introduction, guidelines and all needed materials. It is recommended to create a copy of the board for each session

Opportunity evaluation: https://miro.com/app/board/o9J_kn3y_HU=
Quarterly session: https://miro.com/app/board/o9J_kn98rCQ=



Digital card deck | InVision

The toolkit was designed to fit remote work. Therefore a digital version of the card deck was created and can be accessed in desktop via this link: <https://invis.io/3RQ4E65UBYP>



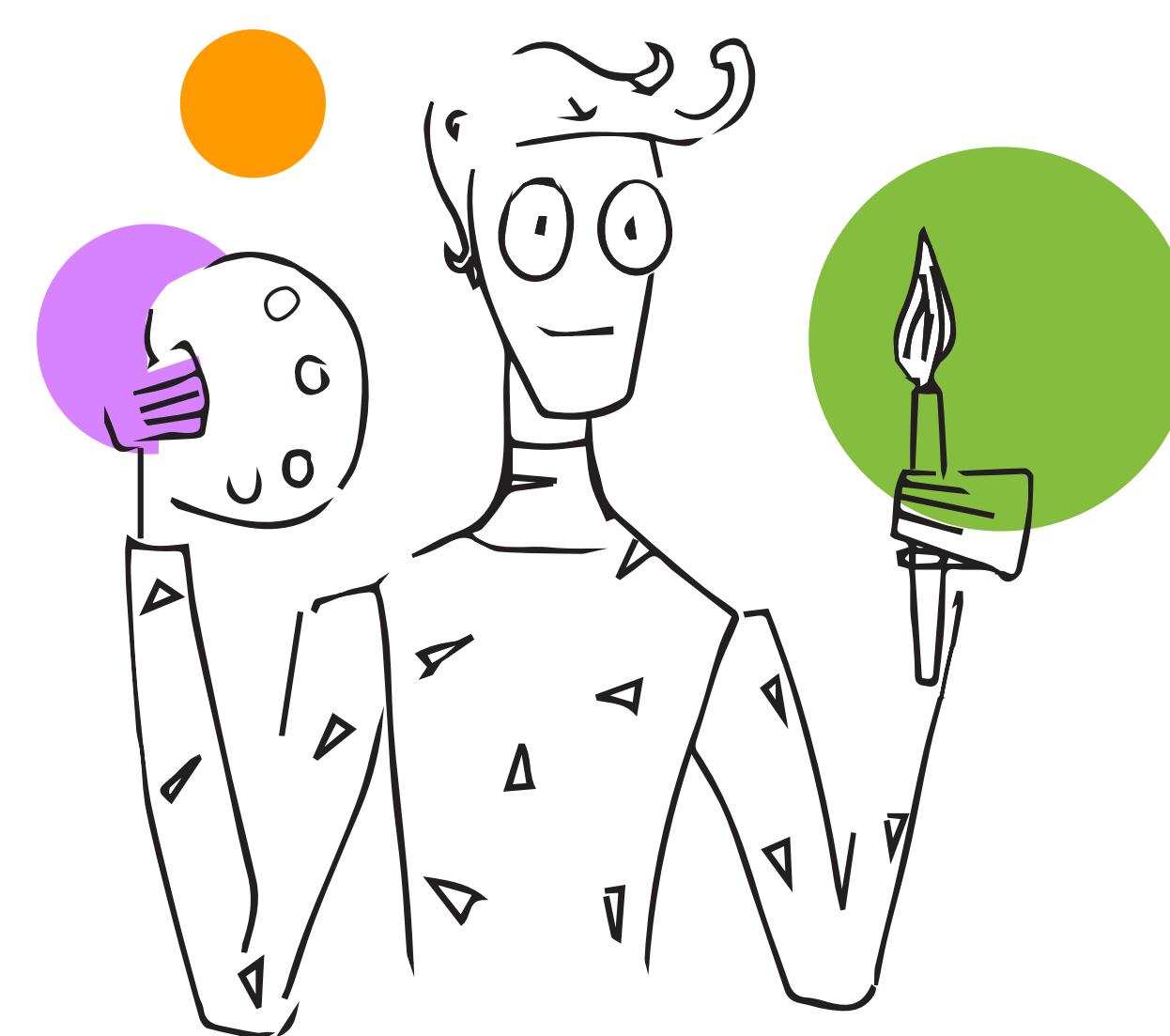
Video and chat | Zoom

The workshops require an online video chat capability. Zoom was selected due to its convenience and breakout room feature. Additional features include recording the session, sharing the screen easily and sending text messages



Set the scene:

Approach & Tips



A good creative session requires a fun energetic atmosphere, where all team members feel free to share, create and think out loud. In a remote session, setting the atmosphere in the “room” isn’t always easy. Here are some tips:

1. Start with an ice breaker

- Team members probably joined the session after a previous activity, and they need to get in the right mood, An ice breaker can help achieve a more friendly and relaxed atmosphere
- It can be anything from "one truth on lie" game to doing fitness exercises in front of the laptop

2. Set some ground rules

- We are here to explore: Discuss as much as possible
- We are here to experiment: There are no wrong answers or dumb ideas
- We are here to brainstorm: Build on each other's ideas
- We are here to align as a team: Your thoughts and ideas matter!

3. Be accessible and assertive

- In a remote session, participants are often more quite and reserved
- Make sure to let them know are encouraged to ask questions and interrupt at anytime
- If team members don't engage, don't hesitate to approach them directly
- If team communication doesn't flow as expected, at any activity the Zoom “breakout room” option can be used to create smaller groups or pairs

D@D IMPACT KIT

FUTURE VISION



What's next

Tool-kit Roadmap

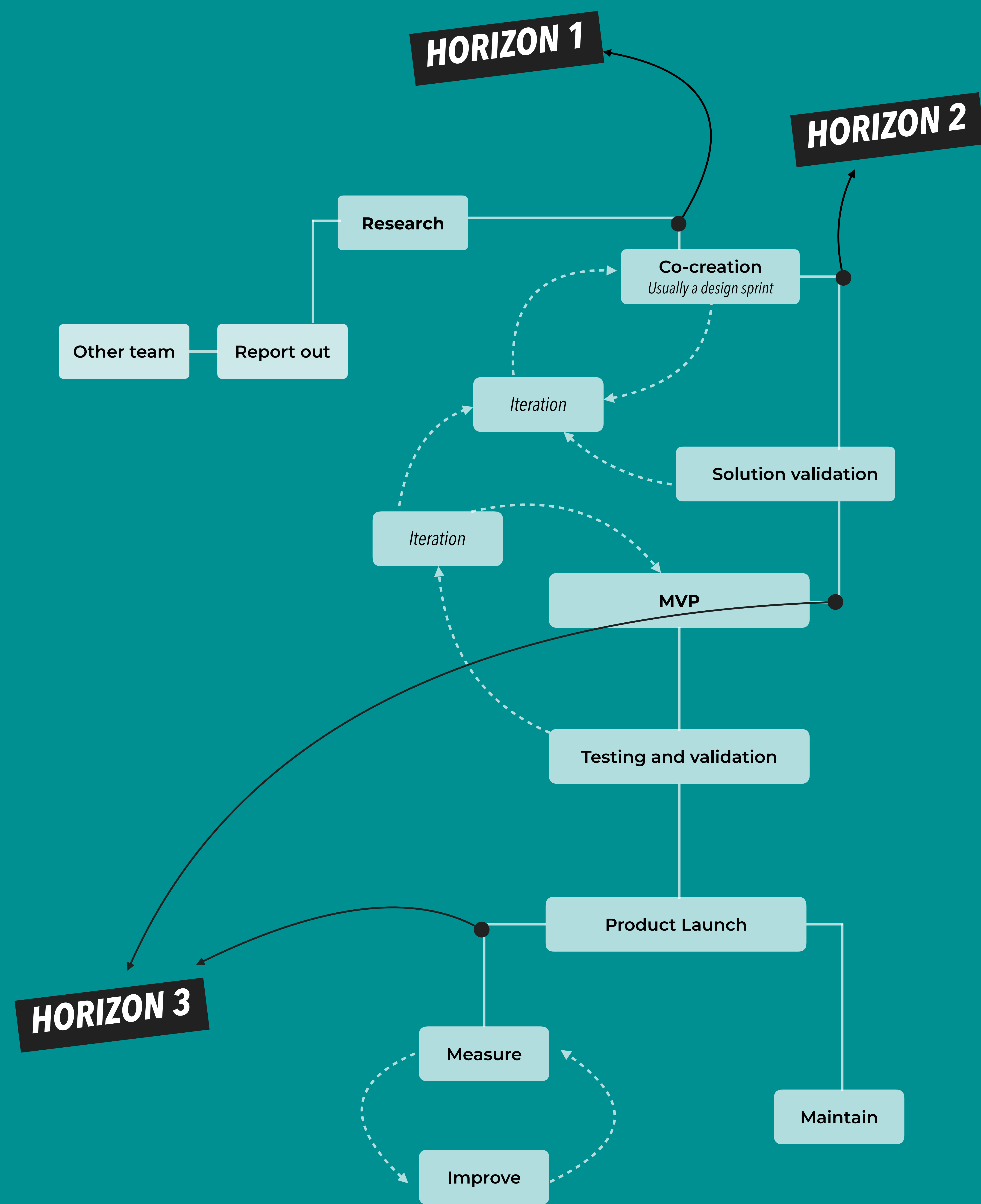
This is a strategic roadmap for the D@D tool-kit. It provides context to the possibilities of the tool after implementation. It can be seen as a future vision for the tool-kit, exploring ways in which the Digital@Deloitte team could use it in the future to create a bigger impact.



**The three horizons of the tool-kit are based on the focus pyramid*

D@D team workflow

Overview



1 | ALIGNMENT AND DISCUSSION TOOL

USE CASE: to evaluate opportunities
MAIN GOALS: Create focus, improve transition from research to co-creation, align team
SUB GOALS: increase sense of ownership and reduce silos

2 | PROTOTYPING EVALUATION TOOL

USE CASE: During co-creation to brainstorm and think of possible solutions, and to evaluate prototype and its potential impact
MAIN GOALS: Evaluate prototype's potential impact and create measurable
SUB GOALS: Spark creativity, discuss a success matrix

3 | DECISION MAKING TOOL

USE CASE: Create measurable targets and KPIs
and plan data collection for a prototype, MVP or existing product
MAIN GOALS: Empower the team to be more self steering and make decisions
SUB GOALS: Improve measuring of solutions, data collection and communication with stakeholders