The Business Design Playbook

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What is Business Design?

Business Design is a discipline that focuses on the understanding of the user, context and the business model to generate new design opportunities that will inform the design of products, services and business models and strategies.

A Business Designer brings the viability and strategy lens to design, making sure that the direction drives sustainable business growth as well as it is human-centred. Therefore, design teams might include Business Designers to empower the viability aspects of the project.

Research is conducted to understand the problem and identify what questions should be asked. Seeing business problems with a design mindset helps to identify the right pains that will lead the solutions. By using a design mindset, Business Design becomes empathetic; Business Designers can understand why people do what they do by seeing experiences through someone else's eyes.

Some of the tasks of a Business Designer are:

- Align multiple stakeholders
- Define, execute and analyze QL/QNT Research
- Identify new customer value propositions
- Define product needs
- Define Strategic Objectives and User Experience goals
- Model and track KPIs
- Design viable Business Models
- Design Roadmaps

The range of challenges that Business Design can solve is pretty broad. The ultimate goal of a Business Designer is to create sustainable businesses. Some of the questions that Business Design projects can answer are:

· How might we be more competitive?

· How might we reach a new target market?

· What new product range should we expand?

· How might we innovate better?

· How might we increase our brand equity?

· How might we redesign our Business Model?

· What is the strategy to achieve a design goal?

· How might we improve our value proposition?

· How viable and sustainable is this design solution?

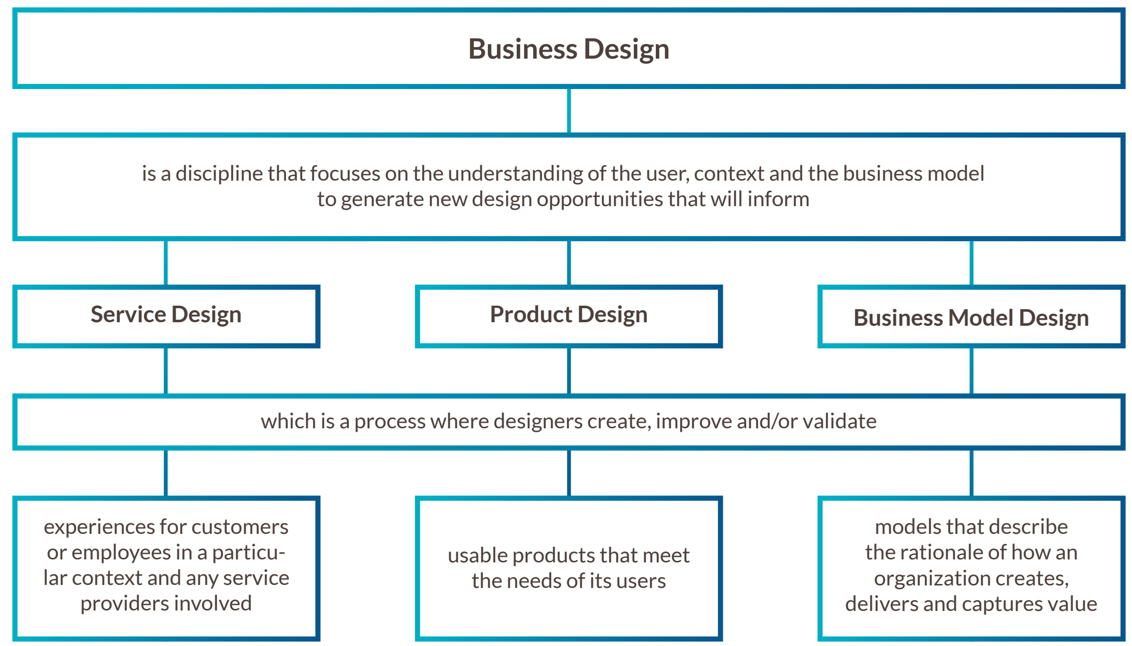
· How will we know this is a successful solution?

Business Design practices involve identifying opportunities to design new products, services and business models that differentiate the company from its competition.

The philosophy of all 3 processes (Product, Service and Business Model Design) is the same, what is different is the goal, outcome and some particular practices.

In order to understand and differentiate the 3 processes, definitions of each process were created informed by literature.

The following map shows the definitions and relationships of Business Design with other design practices.



Why Business Design?

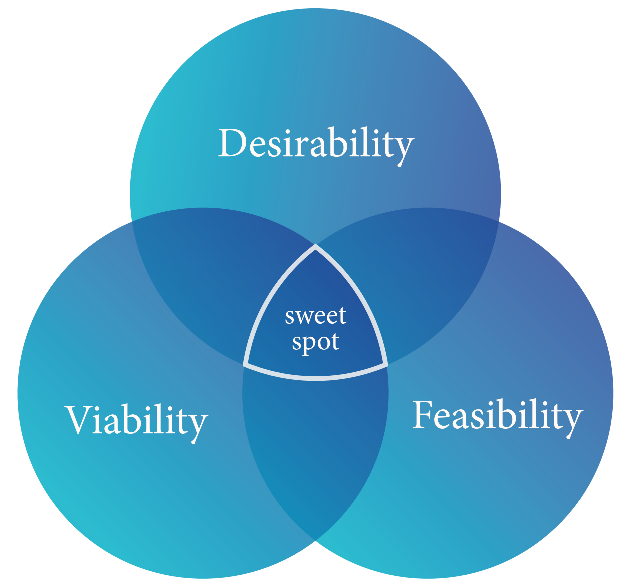
It is important to know why Business Design is beneficial for firms, especially when pitching. Business Designers should start talking about the client's problems; the conversation should be about the business challenges they are facing and how Business Design can solve them. The following aspects can help to drive the conversation.

Holistic View

Business Design understands problems in a holistic way, so the proposed solutions consider multiple stakeholders and are systemic; they are thought to be sustainable. Clients need to create sustainable solutions, and understand problems with a holistic macro view. Later, individual problems can be solved.

It helps the design team to find the sweet spot between viability, feasibility and desirability.

Business Designers are able to translate design solutions into business value and impact, using a language that business managers can understand. It is important to think about the connection between the desirable solution and the business, in order to be sustainable.



Risk Mitigation

Business Design tries to mitigate risk by proposing opportunities and ideas that consider the desirability, viability and feasibility part of the solution. By conducting research in different ambits and considering the user, the context and the business, it reduces uncertainty when proposing an opportunity or solution to the problem. In other words, Business Design helps to deal with uncertainty. This research can be resource consuming, but not spending the right amount of resources can make the company miss meaningful insights that would lead to great products, services or business models; also, it would avoid involving resources in a direction that is not worth it.

Spot the Right Problems

Business Design starts by understanding the problem ecosystem and identifying the right challenges. Many companies develop and implement solutions without understanding what the problem is and what they are aiming to solve. Human-centredness is not widespread amongst many corporations and business people rarely watch how people use their services or products, and therefore, design projects might follow a direction that doesn't solve the core problem.

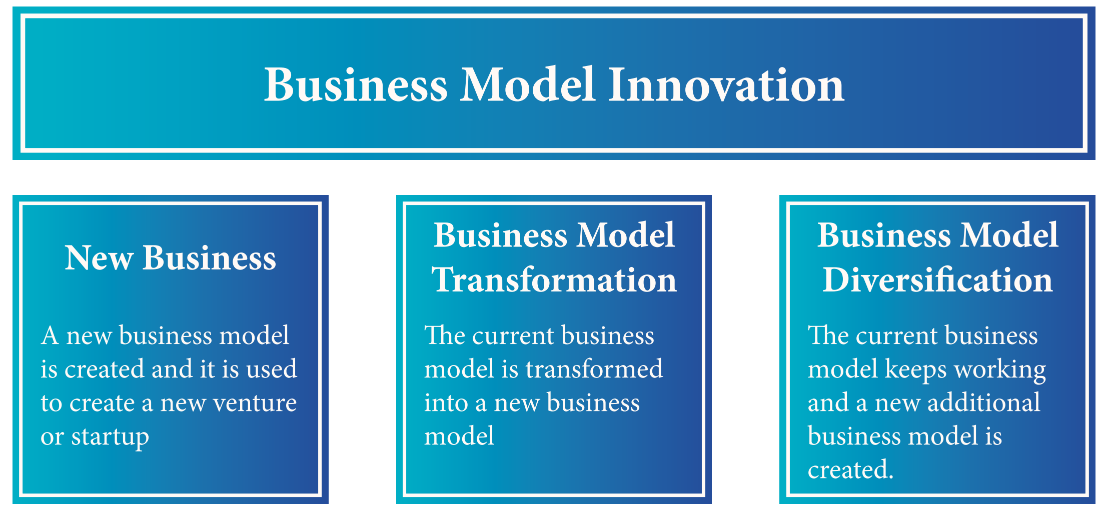
Business Design helps to deal with uncertainty.

Business Model Innovation

In a firm, not so many employees spend time thinking about how to improve the business model, and not innovating it can make the firm fall behind its competitors. Sometimes they focus on the product/service and forget the business model. Nowadays it is crucial to constantly think about the business model and how to adapt it to the new times. This allows to rethink the way the company is operating or to create a new venture.

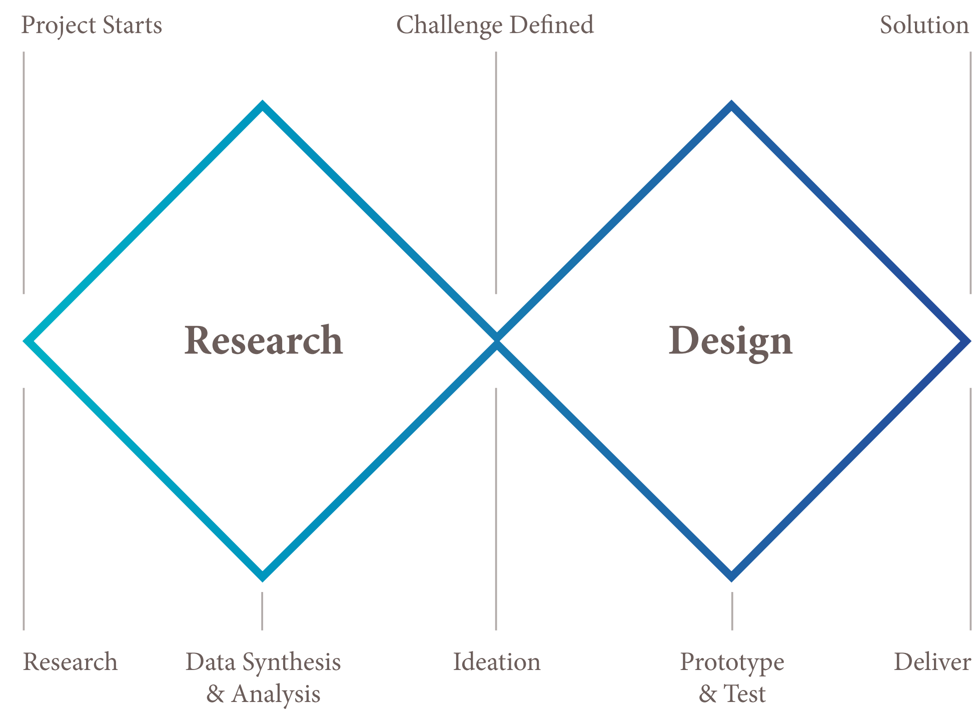
This is why it puts extra effort on the viability part of the solution. Business Designers prototype and test different hypotheses to find the best model.

There are different ways companies can innovate with business models:



How does Business Design work?

Business Design follows a double diamond approach, defined by the Design Council. It is a broad framework that consists of a research phase, which diverges and converges, and a design phase, which also diverges and converges. The aim is to narrow the project scope only when many possibilities have been studied. By following this approach the project is always open to different directions before delivering a solution.



There are multiple processes that can be followed when working on Business Design. One of them is the Design Thinking (or its variations) process. The one explained in this playbook is composed of 6 phases, which are Understand, Observe, Define, Ideate, Prototype and Test. It is not a fixed process, not all projects will involve all phases, and it is iterative: during some phases the project will demand to go back and redo a phase.

It will be needed to study and understand the project goal to see what phases should be involved. For example, if the aim of the project is to generate a pool of ideas for inspiration, they won't be prototyped and tested (at least during that particular project); if the aim of the project is to define the current service blueprint, the project won't need Ideate, Prototype and Test. Same happens with the amount of resources invested in each phase; different projects will require different distribution of resources over the phases of the project, depending on the goal.

In order to deliver solutions that are holistic & sustainable and that solve existing problems, Business Design focuses on 3 aspects: User, Technology and Business. These aspects are transversal to the process, involving different activities in each phase. Considering all 3 aspects is important to deliver innovative solutions that solve human problems and that are viable.

Tools will need to be selected depending on the needs of the project, not every tool fits in every project or situation. This is why in the following section they are explained, as well as the phases, showing why and when they are used, letting the designer choose the right tool for each situation.

	UNDERSTAND	OBSERVE	DEFINE	IDEATE	PROTOTYPE	TEST
USER	industry trends research Mindmapping AS IS	user interviews focus group service safari shadowing	archetypes customer journey map service blueprint how might we	brainwriting storyboarding flow diagram do, redo and undo co-creation session	A/B test usability test focus group landing page mockup	
BUSINESS	stakeholder mapping SWOT current business model research	new business models research statistics research	prioritization matrix	business model canvas roadmap paying customer acquisition map	ROI cost of acquisition financial plan	
TECHNOLOGY		technologic trends research new technology scouting		technology experts interviews co-creation session - experts		

1. Understand

The aim of this phase is to understand the casuistry of the organization and its specific problems in order to define the challenge to work.

Existing data will be analyzed in order to define the stakeholders, the current business model and how the organization works.

After that, an alignment workshop can be conducted with key stakeholders, so aspects like the project scope, business goals, KPIs and success scenario will be defined.

By the end of this phase the team will have a proper understanding of the context, stakeholders involved and the challenge of the project.

Stakeholder Map

Tool that represents the ecosystem of actors and entities that are involved in a process, as well as its relationships.

When?

There is a need to understand who is involved in the process.

The team wants to seek opportunities related to new stakeholders or new relationships between current stakeholders.

Why?

Easy way to understand what actors are involved and its relationships.

Visual way to spot opportunity gaps (actors or relationships).

Step-by-step

1. Put the key stakeholder in the center of the map.

2. Draw concentric circles as layers to include less relevant stakeholders.

3. Draw relationships related to intangible value exchange, money exchange and goods & services exchange.

4. Spot relationships gaps or stakeholders gaps.

Mind Mapping

Diagram that is used to organize and visualize information. It helps to get information in and out of your brain.

When?

The team has previous knowledge of the topic that can be useful for the project.

New information needs to be organized.

Why?

Easy way to understand connections between concepts.

It is a way to visualize thoughts and organize & store them.

Step-by-step

1. Write the main idea in the center of the whiteboard or paper.

2. Create branches to connect the main themes to the main idea.

3. Write a key word in every associated line.

4. Create twigs to connect concepts to themes.

SWOT

Technique that helps to define and organize strengths, weaknesses, opportunities and threats of an organization.

When?

The team needs to understand the current situation of the organization in order to work on the project.

Why?

It helps to have a clear portray of the situation of the organization. It can set the foundations for a better definition of the problem and ideation.

Step-by-step

1. Define the objective

2. Set a co-creation session or use existing information to nurture the canvas.

3. S (Strengths):
   a. What is the company doing well?
   b. What is the Unique Selling Point?
   c. What are the best resources?
4. W (Weaknesses):
   a. What could be improved?
   b. What is the company lacking?
   c. What are the limitations?
5. O (Opportunities):
   a. What opportunities is the company facing?
   b. How can it turn strengths or weaknesses into opportunities?
6. T (Threats):
   a. How can the competition overcome the company?
   b. What threats can affect your weaknesses?

2. Observe

During this phase the team will research and analyze in depth the current model, the actors involved and the user in order to define the new business opportunity.

Research techniques and tools like User Interviews, Focus Groups or Service Safaris will be used depending on the situation.

After doing research and analysis, all the insights will be synthesized and translated into Archetypes and Customer Journeys/ Service Blueprints in order to create a visual representation of the results and conclusions.

When the phase is over the team will have insights that will lead them to set the right direction.

User Interviews

Method to deepen into a topic by asking questions to a user

When?

The team needs to inform personas or journey maps.

The team needs to understand the reason of a problem.

The team needs to validate a decision.

Why?

It is an en asy way to gather hidden information and personal insights. It helps the team to empathize with the user.

Step-by-step

1. Define an interview goal.

2. Recruit relevant interviewees for the project.

3. Create an interview guide, prioritizing open-ended questions, adding follow-up questions and avoiding leading questions.

4. Set the right environment for the interviewee.

5. Record the interview or bring a colleague to take notes.

6. Stick to the semi-structured interview format.

Expert Interviews

Method to deepen into a topic by asking questions to an expert in the field.

When?

The team needs to go in-depth into a particular subject and they are not finding the required information doing desk research.

Why?

Get special knowledge about a particular field, which would be difficult to access to it in a different way.

Step-by-step

1. Define an interview goal.

2. Recruit the right interviewees.

3. Prepare yourself on the topic, get to know the subject area.

4. Create an interview guide, prioritizing open-ended questions, adding follow-up questions and avoiding leading questions.

5. Share the questions with the experts before the interview, so they can be more prepared.

6. Set the right environment for the interviewee.

7. Record the interview or bring a colleague to take notes.

8. Stick to the semi-structured interview format.

Survey

Method to gather specific quantitative data from a representative sample that can be transformed into statistics.

When?

The team needs to validate hipotheses.

The team needs to measure usability or satisfaction.

The team needs to compare different segments or user groups.

The team needs to identify who are the users and what they want.

Why?

Helps the team understand the user.

Add confidence and precision to previous findings.

Step-by-step

1. Define the objectives of the survey.

2. Define target.

3. Choose collection method.

4. Generate questions, test them. Think about what format fits the best: open / closed questions, 0-10 or a-b-c, etc. Questions should be neutral and clear.

5. Introduce the survey.

6. Evaluate results.

Focus Group

Meeting with the aim of knowing participats' attitudes and opinions in respect of a topic.

When?

The team needs real world response.

The team needs an overview of the topic instead of deeper discussions.

Short amount of time is available.

Why?

It is a way to get different user perspectives at the same time.

Being all together helps to avoid the "please the interviewer".

Step-by-step

1. Prepare a questionnaire.
2. Decide on incentives.
3. Recruit and schedule participants.
4. When the meeting starts, start recording the session.
5. Make sure there is equal representation.
6. After the meeting, synthesize and analyze data.

Service Safari

Activity that focuses on experiencing a service in first person, doing the same as the user in order to identify their behaviours patterns.

When?

The team wants to emphasize with user frustrations.

The team needs to understand cultural differences.

Why?

It supports user research by getting first-hand insights and pains, especially the ones that can be difficult to remember or that are subconscious for users during an interview.

Step-by-step

1. Prepare material: camera, notebook, pens, spreadsheet.
2. Plan a single visit or a set of visits over several days.
3. Experience the whole service, different situations. Take notes, pictures, make sketches.
4. Synthesize data.

Shadowing

Activity that consists in selecting a user and accompany and observe him/her during the performance of one or more activities that are relevant for product or service design, without interfering.

When?

The team needs to understand current processes.

The team needs a detailed vision of service dynamics.

Why?

It lets you know user dynamics in real time.

It helps the team to emphasize with the user.

It is not time consuming.

Step-by-step

1. Select a person to observe and inform him/her about the process.

2. Create an interview guide (for closing).

3. Select a relevant day to conduct the Shadowing.

4. Observe and take notes (without conclusions or reasoning).

5. Don't interfere.

6. Conduct an interview with the user about the observation.

3. Define

In this phase the team analyzes the insights gathered during the previous phases.

Once the needs and pain points are identified, they are translated into opportunity areas / challenges.

Opportunities are prioritized internally or collaborating with they key stakeholders. It is used a Prioritization Matrix, usually using impact and feasibility as key factors.

Once the phase is finished, the team will have a clear direction of the project, what challenge/s they have to solve and why they need to be solved.

How Might We

Technique that helps the team to translate pains into opportunities.

When?

The team needs to translate insights into opportunities.

The challenge is not well defined.

Why?

It creates the perfect frame for a challenge, suggesting that a solution is possible and letting enough space for multiple directions.

Step-by-step

1.Choose an insight.

2. Rephrase it as an opportunity question starting with “How might we...”.

3. Evaluate the question, it shouldn’t be neither too leading (it would allow you to work just into a particular solution) nor too broad (it would allow you to work in too many directions).

4. Rework on the question until you find the right space for the solution.

Archetypes

Tool that helps to capture the needs, behaviours, experiences and goals of users. Each archetype sheet groups various characteristics of a user segment and exemplifies a type of relationship between user and service.

When?

The team needs to define the target group to which they will design.

Why?

Easy format to understand user behaviours.

Reminder to focus on user needs while ideating.

Step-by-step

1. Synthesize the research previously conducted (QL and QNT).

2. Analyze the data and look for behavioral patterns.

3. Create embodiments for the different types of user. Involve main behaviors, goals, motivations, needs.

Customer Journey Map

Visual representation of the process that a user follows in order to achieve a goal.

When?

The team has conducted research and needs to detect user frustrations in their journeys.

The team needs to emphasize with the user.

Why?

It helps to have an overview of the user journey and understand the situation.

It helps to detect pain points, gaps and opportunities.

Step-by-step

1. Use the Personas created previously.

2. Define the journey phases. These are the stages the user has to go through during the process.

3. Set the touchpoints between the user and the rest of the stakeholders involved. Define actions, emotions and mindsets.

4. Identify pain points or opportunities

5. Validate the journey map with potential users.

Service Blueprint

Map that represents the relationships between the stakeholders involved in a service process, visualizing the physical and digital touchpoints between them.

When?

The team wants to understand and detect opportunities in the whole process, involving surface and backstage interactions.

The team wants to redesign the current service or create a new one.

Why?

It helps to have an overview of the full process and understand the situation.

It helps to detect pain points, gaps and opportunities of any stakeholder involved in the process.

Step-by-step

1. Use the internal research conducted previously.

2. Define the service process phases. These are the stages the user has to go through during the process, as well as the backstage actions.

3. Identify the activities. These might include customer actions, front and back stage actions, and support activities.

3. Set the relationships between the different stakeholders.

4. Specify timeframes.

4. Identify pain points or opportunities

5. Validate the service blueprint with relevant stakeholders.

4. Ideate

The goal of this phase is to generate creative solutions that are innovative in the market and implementable in the context of the company.

In order to do so, different ideation techniques are used, depending on the goal of the project. Some projects might demand a set of crazy ideas while others might demand 1 implementable idea.

It is common to conduct a co-creation session with key stakeholders and later use the generated ideas, requirements and insights to develop a solution internally.

By the end of the phase the team will have one or more solutions to the initial problem.

Brainwri-ting

Idea generation technique that consists in writing silently, sharing ideas and building on those ideas.

When?

Ideas need to be generated to develop the solution for a problem.

There are introvert people in the team.

Why?

Since it is individual and silent thinking, extroverts don't dominate the session

It allows ideas to emerge before being criticized

Step-by-step

1. Explain the topic to discuss.

2. Give cards and ask attendants to write ideas on them.

3. As they write concepts, they will have to pass it to the person on their left.

4. Attendants have to read the card they received, think about it as an idea stimulation, and add an idea to that card.

5. Repeat the process until there are various ideas on each card.

6. Collect the cards and tape them to the wall.

7. The whole group reviews the ideas and votes.

Do, Redo & Undo

Technique that helps the team understand a worst case scenario and generate solutions to avoid it.

When?

Once the team has a developed concept and wants to refine it.

Why?

Mitigate risk by thinking about worst escenarios and get ahead.

Step-by-step

1. Start with the question "What mistakes will be made?

2. The team writes in post-its different concepts.

3. Post-its are arranged to create different scenarios.

4. The worst case scenario is selected.

5. The team addresses the concepts by focusing on Do (change the design), Redo (correct) or Undo (remove) solutions.

6. The group has to capture the solutions and revisit the best case scenario.

NUF Test

Tool that helps to prioritize ideas, using New, Useful and Feasible as key factors.

When?

The team has a pool of ideas and doesn't know how to choose the right ones.

Why?

Select the best ideas in a rational and systemic way

Step-by-step

1. Create a table with the ideas on the first column, "New" on the second one, "Useful" on the third one and "Feasible" on the forth one.

2. For each idea, give a New, Useful and Feasible 1 to 10 value

3. Identify the lowest marks and try to make those ideas stronger

4. Add the values of each solution

5. When the exercise is finished, the team will be able to visually spot the weakest aspects of the proposed ideas, as well as the ideas that are strongest overall.

Business Model Canvas

Tool that portrays a business model in a structured way.

When?

The team needs to understand the current business model or competitors' business models.

The team needs to organize the new generated ideas of a new business model.

Why?

It is a structured way to think about the whole business model and detect gaps, opportunities or flaws.

Step-by-step

1. Map different existing business models related to the topic to learn about the field.

2. Fill the 9 blocks with the current state (if it is a redesign), using post-its of color A.

3. Connect the blocks, detect inconsistencies and identify opportunity areas.

4. Add new features (post-its color B) or remove existing ones, ask several times "what if?" and create new links between features.

5. Review the canvas and look for inconsistencies.

Paying Customer Acquisition Map

Map that shows the process of a customer deciding to purchase the product.

When?

The team has designed a product and needs to know how will the process of acquisition look like.

Why?

It helps the team to understand the length of the sales cycle. Also, it helps them to identify barriers that stop customers to buy the product.

Step-by-step

1. Define how customers will know they have a need to move away from their current state and purchase the product.

2. Define how customers will find out about the product.

3. Define how customers will analyze the product.

4. Define how customers will acquire the product

5. Define how customers will install the product

6. Define how customers will pay for the product.

Roadmap

Map that describes a desired state and the steps needed to reach it over time.

When?

The team needs to portray a future scenario and draw a plan in a visual way, understandable and easy to read.

Why?

It helps to understand what are the steps to reach a desired state and it helps to not forget aspects on the process, as well as making adjustments along the way.

Step-by-step

1. Define the ultimate goal for the project.

2. Define time horizons.

3. Define lines related to the Business Model, Product/Service, Resources, Communication.

4. Fill the areas with goals for each phase.

5. Write milestones that need to be achieved.

5. Prototype

The team will create a prototype that will be used to validate ideas. The aim is to do it rapidly and cheap, so it is easier to iterate and detect flaws.

The team will define what aspects are important to test, involving user interface, user experience or the business model.

For digital solutions, information architecture and navigation flows will be defined. Wireframes will be designed for posterior testing.

When the team has worked with different parts of the business model, a Business Model Canvas will be used to create a Business Model hypothesis to test.

6. Test

Once the prototype is created, the team needs to choose the right tests to get relevant infomation, answer certain questions and define next improvements.

Testing helps the team to better understand the features of the design.

By the end of the phase the team will have different insights and paths to follow with the next prototype or the real product/service/business model.

A/B Test

Method that consists in showing two variants of a website or an app to potential users and determining which one performs better.

When?

The team has one idea of improvement that influences user behaviour and wants to check if it will work better than the current one.

The team has 2 different solutions and wants to know which one will work better.

Why?

Validate hypotheses and make changes to the user experience based on results.

Step-by-step

1. Formulate an hypothesis.

2. Create a variation based on the hypothesis. The main elements to test are: Headlines, Writing Style, Design, Layout, Navigation or Call to Action.

3. Run test.

4. Analyze results.

Role Playing

Technique that represents a service by acting out the scenario and the ways of use.

When?

The team has designed a service or a business model and wants to test the interactions quickly and in a cheap way.

Why?

It helps the team feel the situation and detect aspects that are not coherent, such as the sequence of the actions or the way they are executed.

Step-by-step

1. Define the situation that wants to be represented, as well as the sequence.

2. Define roles and characters.

3. Act out the scenario.

4. Reflect on what went well and wrong.

Usability Test

Method to test the functionalities and navigation of a digital product, such a wesbsite or an app.

When?

A digital product has been prototyped and there is uncertainty about user interaction.

Why?

It helps to spot interaction / usability flaws and areas of confusion.

The team learns about the target group behaviour

Step-by-step

1. Define the tasks that will need to be performed during the test.

2. Set the situation so it can be recorded.

3. The facilitator gives instructions and guidelines to conduct the test.

4. The facilitator will ask questions and encourage the participant to think out lout while performs the activities.

5. Wrap up, ask remaining follow up questions.

What are the trends?

Several trends could be gathered from research (2020). These insights could be clustered in different themes:

Specialization by Sectors

Business Design is getting deeper into businesses, a higher level of verticalization and industry expertise will be more and more necessary in order to solve the challenges spotted. If consultancies don't want to stay on a high level of abstraction, they will need to master the industry, so they can deliver solutions that really solve the clients' problems. This is why consultancies will need to have different lines inside the company, in order to have expertise in different industries / sectors. Knowledge on industries will become a key asset and a differential point for clients when choosing a consultancy to solve their problems. Consultancies will need to contant training in the industries selected and hire consultants that migrate from those industries to bring expertise.

Financial Orientation

It is thought that Business Design will become a discipline that focuses even more on financial aspects. A stronger economic analysis will be required and viability will be more present when arguing a solution. Quantification of results will be more usual than today.

Business Designers will need to learn more methods to quantify results and more business language to communicate them, since the discipline will get closer to C-Level and Innovation Management positions.

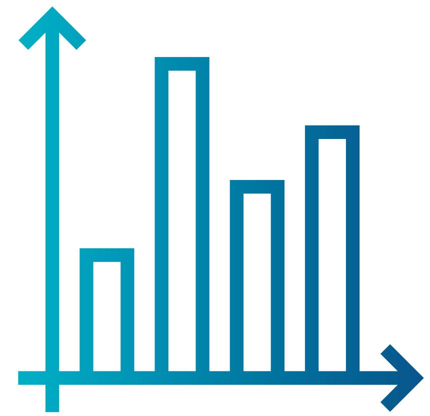
Also, consultancies will work more on business models. Projects like helping a corporation to develop a SME, creating new products or services that disrupt the current business model or propose new business models that can benefit the firm will be more frequent, being the viability aspect

Data

Firms are demanding consultancies to involve data in their projects. They know they have a lot of information stored that is not being used and don't want to waste it. They see potential in data, and how research budgets can be reduced by exploiting it, so those resources can be invested in different phases of the project.

Data will change the way research is done in Business Design. Data mining and analysis will become more important and it will be performed jointly with traditional research, which will be reduced.

Also, consulting firms will be able to use public data to detect potential problems in businesses and propose projects proactively. They will be able to go to clients with a problem spotted and a project direction, which will change the way project briefs are generated.



Vocabulary

Agile methodologies Iterative approach to project management defined by 4 values and 12 principles that executes projects incrementally instead of delivering all at the end of it.

Business Model Model that describes the rationale of how an organization creates, delivers and captures value.

Co-Creation Session Session where the participants are relevant stakeholders of the project, and with the help of one or more facilitators they brought into the design process, to propose requirements, solutions or other relevant insights.

Cost of Acquisition Is the ratio of the cost of acquiring a new customer and the number of customers acquied.
CAC = (Cost of sales + Cost of Marketing) / New Customers Acquired

Design Thinking Iterative process for creative problem solving, that looks for understanding the user, identifying the right challenge, ideating on the problem and prototyping and testing the proposed solution.

Human Centred Design Creative approach to problem solving, it starts with people and ends with innovative solutions tailored to meet their needs. It is about understanding the people you are trying to reach and design from their perspective, to arrive to unexpected answers and come up with ideas they will embrace.

Journey Map Map that represents the process that a user goes through in order to accomplish a particular goal.

Pain Point Specific problem that users/customer of a service/business are experiencing.

Persona Fictional characters informed by research in order to represent different user profiles.

Product Design Process where designers create usable products that meet the needs of its users.

ROI Return on Investment. Measure to evaluate the efficiency of an investment.
ROI = (Amount gained - Amount spent) / Amount spent

Scenario Planning Assumptions on how the future business scenario will look like

Service Blueprint Map that represents the relationships between the stakeholders involved in a service process, visualizing the physical and digital touchpoints between them.

Service Design Process where designers create experiences for both customers or employees in a particular context and any service providers involved.

Stakeholder Party that affects or is affected by the activity of a business.

Value Proposition The value that a company offers to its customers/users/clients and that is the reason why it should be chosen over its competitors.

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This playbook could be created thanks to the following people, companies, books and other sources:

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Gamestorming, by Dave Gray, Sunni Brown, James Macanufo

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Business Model Generation, by Alexander Osterwalder

Service Design, by Andy Polaine