



Field Manual for

Rapid Innovation

Intro

This field manual is intended to help fellow explorers discover 5 methods of rapid innovation that you can introduce into your organizations. Each one provides a succinct view of the method and a blank template to begin honing your skills. Happy trails.

Who we are

Praxent is a digital innovation agency. Our team of US-based digital strategists, UX designers, and software developers works nationwide, converging at our home base in Austin, Texas. Our passion is to transform processes, enhance experiences, and empower people for service-based businesses who want to win. We help our clients unlock potential and fuel growth with effortless user experiences and strategic technology tools.

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Proto Persona

Overview

Personas are a powerful tool that helps gain alignment with stakeholders and team members, orients your goals with a specific user in mind, and enables informed decisions about the project. Proto personas serve the same purpose but are created using stakeholder intuition, anecdotal evidence, and sometimes existing research.

Proto Personas aren't as reliable as heavily researched personas, but they can be a boon early in a project or when you need to move forward quickly.

Who are they?

- Name
- Basic Demographics

Values & Behaviors

- What do they like/dislike?
- What matters to them?

Stories & Scenarios

- Examples

Goals & Needs

- What are they trying to accomplish?



Value

Proto personas give you a point of reference for your target user's behaviors, goals, needs and other high-level information to help you make thoughtful decisions.

- **Inclusive** - provides the voice of the customer
- **Shared vision** - helps align stakeholders and narrow your focus to your target users
- **Slippery slope** - showcasing the value of design thinking can influence future investment
- **High speed to execution** - can be created in a matter of days, not weeks

Tactics

There are tried and true methods for creating a true persona, but you must be thoughtful and adaptable when creating a proto persona. Using some, or all, of the methods below, can help you to rapidly identify key user types, their goals, common behaviors, and needs from the product or feature you're designing:

- Observe user behaviors today by leveraging existing research and analytics
- Interview and include stakeholders to understand what they think they know about their users and what problems they are hoping to solve
- Analyze the competitive landscape and see how others solve problems for similar users
- Identify and rank key characteristics
- Make them tangible with a name, tag line and personal quote



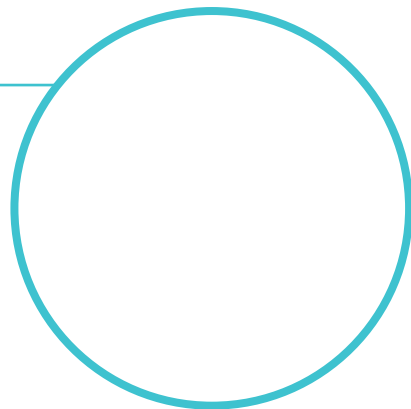
Proto Persona

Bio & Demographics

Behaviors

Stories & Scenarios

Goals & Needs

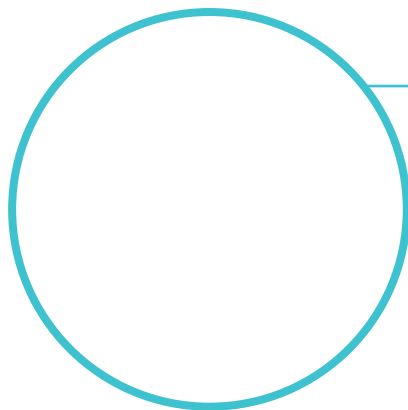


Name

Tag Line

Personal Quote





Name

Tag Line

Personal Quote

Bio & Demographics

Behaviors

Stories & Scenarios

Goals & Needs





Journey Mapping

Overview

Mapping your user's or customer's journey is an extremely valuable tool to identify areas of frustration, delight, and opportunities you can capitalize on when designing your product or feature. At its core, a journey map is a visual narrative of what a person experiences over time in a given scenario. While some prefer to call them User Journey Maps or Customer Journey Maps, the view and insight it provides are more important than what you call it.

Value

Journey maps give you detailed insight into a user's thoughts, feelings, and behaviors as they experience the different phases of a scenario. With this visualized journey, you can easily identify areas where users are running into serious challenges, parts of the experience that resonate well with them, and potentially areas of opportunity that can lead to market-differentiating features.

- **Alignment** - encourages conversation and helps stakeholders and team members align their mental models about how a user experiences a scenario
- **Shared vision** - a visualization that highlights pain points, gaps and opportunities
- **Data-driven decisions** - a cross-section of thoughts, behaviors, feelings, and phases within a situation that gives you the understanding you need to make impactful decisions
- **Quick insights** - produce insights in less than a day



Tactics

When journey mapping it is important to have the right people in the room, a dedicated block of time for the activity, someone to facilitate the conversation, and some information to start with. Here are some tactics to consider when running a journey mapping exercise:

- Plan for a half day session, and don't forget to structure some breaks for your participants
- All key stakeholders and team members need to participate in the exercise
- Leverage existing research and insights to begin structuring your map and drive the conversation forward
- Your map should target a specific user, in a specific scenario, trying to achieve a defined goal
- First, confirm the start and end points of the journey, and the major steps in between.
- Next, capture your user's thoughts, behaviors, and feelings for each phase of the scenario
- Finally, identify opportunities across the bottom of your map to show relation to what the user is experiencing in that phase
- The journey map should always support a known business goal and should be rooted in truth (based on user research)





Journey Mapping

Persona

Scenario

Stage 1

Stage 2

Activities

Feeling



Opportunities





Goals & Expectations

Stage 3	Stage 4





Sketching Exercise

Overview

Quick sketching can be a great way to break the ice, push past initial concepts, get people in an innovative mindset, and explore ideas that might otherwise not surface. Crazy 8s, one of our favorites, is a useful tool when you need to generate a lot of ideas, identify themes, align on a direction, and even to improve engagement from folks who may typically keep to themselves. The idea is to sketch 8 ideas in 8 boxes over 8 minutes. It forces you to stretch your thinking and ideate at a rapid rate.

Value

Rapid sketching exercises help people to break through barriers by focusing on quantity over quality. You don't have time to articulate your thinking, to dwell on the cascading impacts, or fine-tune the aesthetics. You have 1 minute per idea and a hard stop at 8 minutes.

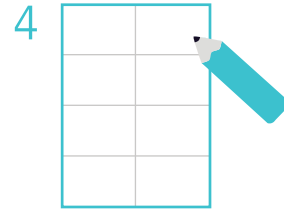
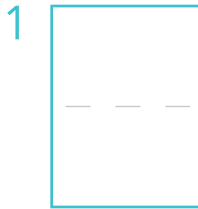
- **Time pressure** – allows you to explore beyond your initial ideas, which tend to be the least innovative of the bunch
- **Inclusive** - you don't have to be an artist to draw a simple visual of an idea that could disrupt your market
- **Collaborative** - this 8-minute exercise gets everyone into an innovative mindset



Tactics

Sketching exercises can be effectively used in many scenarios. It can be a great way to break the ice for a meeting, a way to align on potential starting points for a new idea or a way to engage a particularly tough crowd. Here are a few ways to incorporate sketching exercises into your process:

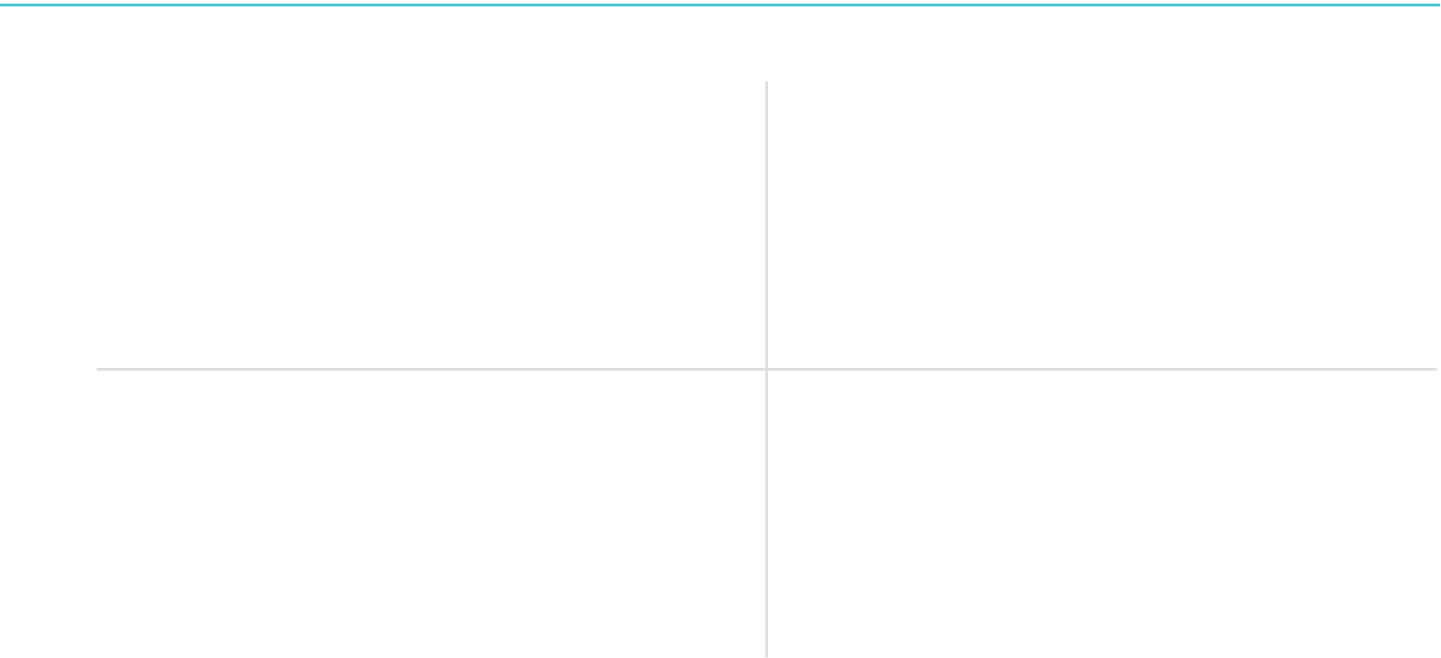
- A short sketching exercise at the beginning of a brainstorming session can help align everyone's mindset to improve output and engagement
- Any sheet of paper can be folded 4 times to create a 4x2 grid of squares to sketch Crazy 8s
- Start by taking 5-10 minutes to compile inspiration for your sketching, which may include requirements, workflows, widgets or tools from other sites
- Reinforce the idea that you don't have to be an artist to contribute value in a sketching exercise
- Quantity over quality - the more ideas you generate the better
- After the exercise, take a few moments to review and capture what you think is working, and ideally compile the ideas into one cohesive flow to use for drive-thru research





Crazy 8s







Drive-thru Research

Overview

Research in our industry can take on many forms. The idea of “drive-thru” research is a way to engage an audience with as light a touch as possible. They have the ability to discover the research, participate in it, and leave quickly without having to talk to a researcher.

Value

In a large office or conference hall setting, this method of research can net more participation than an engagement that requires a conversation or a considerable length of time. If you are trying to engage as many people in a space as possible, you want to give them an easy way to participate on their timetable.

- **Participation** - A higher level of engagement with more people in a short amount of time
- **Inclusive** - People are able to participate at their leisure and their own pace, which could be less than a minute
- **Quick insights** - Gain deep insights by asking questions that can be measured together
- **Unbiased** - By removing the interaction, participants can give honest feedback without bias



Tactics

The core purpose of drive-thru research is to encourage engagement through flexibility and ease of use. The way in which you employ this is up to your imagination. Here are a few ways you can use this method:

Design Critique / Concept Validation

- First, place concepts on a board in a public space of your office for several days
- Next, leave post-its, markers, stickers, and any other supplies participants need
- Then, cast a wide net by requesting feedback via email, Slack, etc.

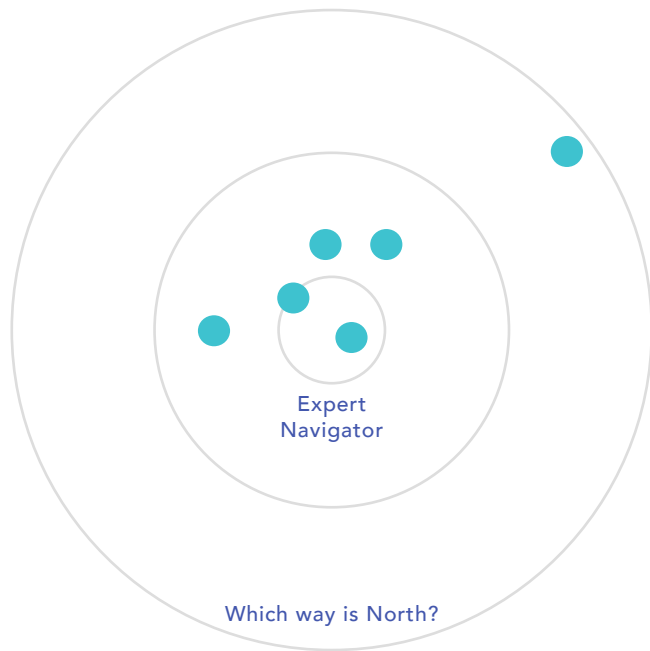
Research Insights / Idea Validation

- Define your questions, such as “How much does your organization invest in your development”
- Create a 3-ring target, like darts or archery, for each question
- On the outer ring define one end of the spectrum for answers, such as “Invests very little”
- On the inner ring define the other end of the spectrum for answers, such as “Invests heavily”
- Place the targets on a board in a public space and leave stickers for participants to place on the targets



Question 1

How well can you read a map?



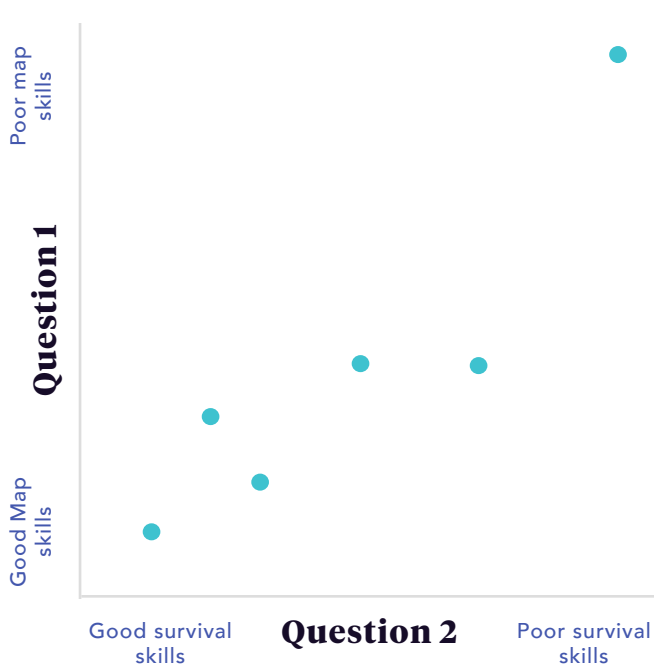
Question 2

How are your survival skills?





Drive-thru Research Example



Insights

People with good survival skills likely have training with a map

People with poor survival skills likely have little to no training with a map

People who have moderate to good map reading skills are likely to have moderate survival skills



Question 1

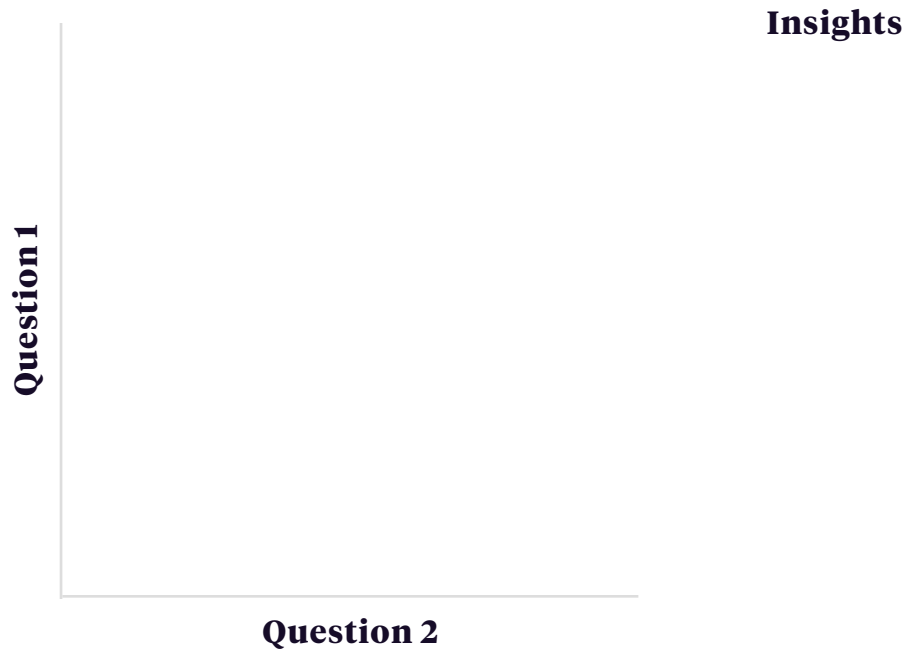


Question 2





Drive-thru Research





Guerrilla Research

Overview

Finding the time and budget to conduct quality user research can be one of the most challenging things to sell your stakeholders on. Guerrilla research is a quick and dirty method of gathering feedback on your product, idea, feature, design, etc. Taking a drawing of your idea to a local coffee shop and asking 5 people what they think is one example of guerrilla research.

Value

All research provides value. The real value in guerrilla research is the low investment and high speed to execute. While it doesn't give you the level of insight and confidence that traditional user research does, it is a big step in the right direction. You could identify a problem that would have cost the business considerably, by testing a paper prototype with a few people at the mall.

- **Low investment** - you can get a lot of value from guerrilla research in a single day, with 1-2 facilitators, and a low fidelity mock-up
- **High speed to execution** - research like this can provide instant insights and drive decisions to iterate the concept
- **Easier to chew** - this type of research can be easier to sell to a stakeholder or client than a more costly traditional research phase
- **Slippery Slope** - showcasing the value of some research to a stakeholder or client can lead to buy-in for more effective user research on the next engagement



Tactics

Guerrilla research is meant to be fast and dirty. The type of research you do and the place at which you do it can be very flexible. You still want to target users as close to your personas as possible, but this is still challenging. If you need to talk to elderly people, for example, you might go to the mall in the middle of a weekday. You have to take what you can get with this type of research, but that doesn't mean leaving it all up to fate. Here are some tips on how we conduct guerrilla research:

- Clarify your goals, prepare a protocol, and simple script of key questions ahead of time
- Pick a place where you believe you can find close to target participants, but don't focus too much on getting the "right" people to participate or your afternoon may be a total wash
- Have an incentive (like a \$25 gift card) for participating and be gracious when you are shot down
- Target 30 minutes or less for the overall session
- Paper prototypes and sketches can generate as much insight as a fully developed prototype
- Let the people working at the location know what you're doing and ask for their help sending people your way
- Bring a buddy so one of you is ready to facilitate at the drop of a hat while the other continues to look for participants



Guerrilla Research

Research Goal

Target Personas



Key Questions



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Praxent.com

DISCOVER

Own disruption with digital innovation strategies that unlock potential and fuel growth.

ENVISION

Design effortless user experiences in collaboration with your most important people.

BUILD

Bring digital innovation to life with built-in knowledge transfer to empower your team.