06 IDEATION METHODS

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There is a whole industry around idea generation and selection. In service design, we see ideas pragmatically – as the connector between insights (from research in the real world) and the evolution of ideas which comes through real-world prototyping. Use ideation methods lightly to move quickly between these more important activities, never to replace them.

Countless methods exist, often under multiple names, to create, filter, and select ideas. Here, we introduce some favorites, presented as detailed step-by-step instructions and structured into categories:

- **Pre-ideation:** Slicing the elephant and splitting the ideation challenge, ideas from journey mapping, ideas from system mapping, “How might we ...?” questions from insights and user stories

- **Generating many ideas:** Brainstorming and brainwriting, 10 plus 10

- **Adding depth and diversity:** Bodystorming, using cards and checklists, ideation based on analogies and association

- **Understanding, clustering, and ranking options:** Octopus clustering, Benny Hill sorting (“Thirty-Five”), idea portfolio, decision matrix

- **Reducing options:** Quick voting methods, physical commitment
KEY QUESTIONS FOR PLANNING YOUR IDEATION APPROACH

Consider the following key questions when selecting the right ideation methods:

- **Starting point/scope**: What is the starting point and scope of this phase of ideation? How deep or how broad do you want to go this time around? What is the wording of your ideation challenge?

- **Immersion and inspiration**: How do you prepare the contributors and connect them to researched reality or the last round of prototyping? What materials do you show them? Which part of the material do you want them to experience? Do you prepare everyone, or keep some strategically ignorant?

- **Split**: How do you split your ideation challenge into multiple manageable tracks?

- **Contributors**: Who could meaningfully contribute to your current ideation challenge? Who should contribute during idea generation? Who should contribute during idea selection?

- **Ideation loops**: How often do you need or expect to iterate between idea generation and idea selection in this phase of your project? How do the different idea generation and selection sessions feed into each other?

- **Stopping criteria**: When should you stop ideating for now and move on (e.g., toward prototyping)? (Remember, many more ideas will come during prototyping.)

- **Outputs**: How many selected ideas will you need this time around? What format do those ideas need to be in so they can be pushed forward?
Ideation planning checklist

Which of the following methods are you planning to use during ideation?

Pre-ideation

☐ Slicing the elephant - splitting the ideation challenge
☐ Ideas from future-state journey mapping
☐ Ideas from future-state system mapping
☐ “How might we...?” - trigger questions from insights

Adding depth and diversifying ideas

☐ Bodystorming
☐ Using cards and checklists
☐ Ideation based on association
☐ Ideation based on analogies

Generating many ideas

☐ Brainstorming
☐ Brainwriting
☐ 10 plus 10

Clustering and quickly ranking ideas

☐ Octopus sorting
☐ Quick voting methods
☐ Benny Hill sorting
Pre-selecting ideas

- Physical commitment
- Idea portfolio
- Decision Matrix

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Often, the theme of ideation is too large or abstract to get a grip on. You can use various techniques to limit or split the theme into more manageable chunks, see different aspects of the theme, and produce more diverse ideas.

Various approaches or techniques can be used to split an ideation challenge into smaller subunits. Here are some useful examples:

— In the Six Thinking Hats exercise by Edward de Bono, participants are encouraged to sequentially adopt different viewpoints by changing hats (blue for managing the big picture, white for information and facts, red for emotions, black for discernment and logic, yellow for optimistic response, green for creativity) and ideate from these.

— “Attribute listing” takes different attributes (such as physical, social, procedural, or psychological) of a problem or idea and looks at them individually, ideating around each one.

— The “5 Ws + H” technique invites participants to ask themselves six questions (who, where, what, why, when, and how – questions that have been asked by philosophers since antiquity) and look at variations of the answers to each of those.

— In the “Five Whys” method made famous by Toyota, we look at a problem or fact and ask ourselves “why” five times or more. Each answer can be the starting point for ideation.

Subtext chains, a physicalization of the Five Whys method which lets us slice a question (here, “What does this angry customer really want?”) into simpler subquestions, and start to generate answers. See the discussion of the subtext method in #TiSDD 7.2, Prototyping methods, for more on subtext. The method works well on paper too.
**Step-by-step guide**

The process will vary with the specific method used. In general terms:

1. Look at your starting point for ideation and consider if and how you will bring previous knowledge into the room (for example, as a research wall or as key insights).

2. Invite the right people to work beside your core team for the exercise (this might include people who know the background, people with no preconceptions, experts, representatives of the implementation team, people who will deliver the service, users, management, etc.).

3. Prepare the participants, perhaps with a warm-up, to develop a safe space.

4. Run the method.

5. Examine and perhaps cluster your ideas. What do they suggest? Do you need another run, or even another method?

6. Move into idea selection when you are ready.

**Method notes**

-> Encourage participants to look beyond the obvious by encouraging them to stay on each theme a little longer than they want to. Usually, the first ideas are the obvious ones – but when it starts to get difficult, we are forced to search more widely and there is a potential for real novelty.

-> Use ideation methods sequentially, taking the output from one method as the input for the next. This will move you further away from your starting point.
Several years ago, I realized there was no simple model for mapping the state of mind of users. I wanted to document why the same users often responded to the same service offering very differently depending on their specific situation.

The result was AESEO – Attitude, Expectation, Schedule, Environment, Origin. I mapped these considerations on a simple slider:

- **Attitude**: Is the user in a positive or negative state of mind when confronted with a task? For example, booking a vacation for yourself is different than booking a vacation for your nasty boss.

- **Expectation**: Does the user think she will achieve a positive or negative outcome upon completion? For example, I expect a vacation website to be friendly and help me complete my task, but I rarely feel this way when approaching an online government service.

- **Schedule**: Does the user have a pressing deadline or not?

- **Environment**: Is the user relaxed or stressed? For example, is this something I might do on my day off or do I need to squeeze it in on my lunch break?

- **Origin**: Quite simply, is the user doing this for herself or for someone else?

**How and when to use AESEO**

Although this is a highly subjective tool, AESEO helps service designers see how various personas react to specific services and link personas, use cases, scenarios, and journey maps in a unique and understandable way. For example, if you find on your journey map that several of your personas intersect at a particular touchpoint, AESEO can help you avoid “over-designing” your service at this juncture. While some users may enjoy helpful personalization, others may just want to get their task accomplished quickly without unnecessary frills.
This means you need to evaluate your service very carefully so you don’t annoy a particular user segment.

AESEO also helps you produce a quick overview of the user’s state of mind during a particular scenario for documentation purposes. For example, if you drive a car, sometimes you will just want to go for a ride and enjoy yourself. Hence, comfort plays a key role, and most of your sliders will be set to the left of center. But if you need to pop down to the store to pick up something for dinner, comfort takes a back seat to convenience, and more sliders will be set toward the right.

Inevitably, there will be points of friction when the service design concept gets in the way of the users’ needs. For example, if a user has very little time and just wants to log in to her account quickly, you probably do not want to force her to watch a 10-second advertisement first. It is your job to identify and reduce these points of friction.

These differences are important to understand when evaluating the viability of a new or improved service. At any rate, play with AESEO – I trust you’ll find the tool as useful as we have.

**Step-by-step guide**

1. Choose one of your personas and subjectively set the AESEO sliders based on your understanding of their needs in relation to their perceived state of mind.

2. Repeat this for your other personas, or if one persona appears in several different user scenarios, set the sliders for the different scenarios.

3. Look at the sliders to identify potential points of friction in relation to your customer journey map and target opportunities for service improvements.

4. Continue to improve your concept and readjust the AESEO sliders until you arrive at a service concept that eliminates as many points of friction as possible.
IDEAS FROM FUTURE-STATE JOURNEY MAPPING

Using one of service design’s classic experience visualization tools to generate ideas around experience and process.

Duration

| Preparation: up to 10 minutes (not including the preparation of research results or a current-state journey map, if you use one) |
| Activity: 0.5 hours–1 day |
| Follow-up: none, or a few hours if you want to make the new maps look good |

Physical requirements

Paper, perhaps map templates, pens, sticky notes, tables or wall space

Energy level

Medium (high for One-Step Journeys)

Facilitators

1

Participants

Minimum 3

Expected output

New future-state journey map, ideas in various forms which can be deepened and diversified or prototyped

Teams can generate new ideas in a structured way by creating future-state journey maps. Starting with a current-state map, or using your research and experience, you create complete or partial new journey maps. On the way, you generate many individual ideas which may be diversified or prototyped. Use this with groups who are comfortable thinking in journeys and experiences. Working at the journey level lets you think about orchestration and expectations even at this early stage.

Step-by-step guide

1 Invite the right people to work beside your core team for the exercise (this might include people who
IDEAS FROM FUTURE-STATE JOURNEY MAPPING

1. Know the background, people with no preconceptions, experts, representatives of the implementation team, people who will deliver the service, users, management, etc.

2. If you have some current-state journey maps, let the group familiarize themselves with them and, if practical and desirable, with the research behind them. If you don’t have current-state journey maps, use storytelling, based on the experience of the people in the room. Of course, this is more assumption-based, but it can be useful.

3. Take one map at a time and use the best information you have to identify critical steps in the journey.

4. Pin down some critical issues which need to be changed.

5. Ideate around each of these points to look for alternatives. You could think about JTBD to open up your thinking away from the existing service model. Try other ideation methods, like brainwriting, 10 plus 10 sketching, or bodystorming. Record your insights, ideas, and any new questions.

6. Choose some of the most promising ideas, perhaps using a quick voting method.

7. Quickly draw some rough maps incorporating your new ideas. How do the changes affect the rest of the journey? How do the technology and process change? What about the experience and expectations? Use

See methods like Investigative rehearsal and Desktop walkthrough in #TISDD 7.2, Prototyping methods, or the Bodystorming online method description.
desktop walkthroughs or act it out, if that helps. Also, you might try a combination of different journeys.

Identify the most interesting new journey features and incorporate them into one or more new maps to take forward, perhaps developing them into service blueprints to explore the frontline and backstage processes. Alternatively, go straight into prototyping these new journeys in more detail.

**Method notes**

- As with all co-creative tools, the conversation around the tool is as important as what goes on the paper. Make sure the group keep notes.

- The use of customer journeys for ideating a future state is widespread, very popular, and has some clear benefits in terms of thinking in sequence and flows. However, we need to be aware of an important risk: working with customer journeys focuses on the interaction, but usually keeps this interaction framed within the existing service model. This lowers the chance of breakthrough innovation. Try using a job to be done to open the range of innovation.02

- When inventing future-state journeys, many participants will be too optimistic. They will create journeys where everyone wants to sign up right away. Encourage them to remember that customers are often busy, distracted, skeptical, and tired – that will lead to much more interesting ideas.

- When you review the journeys, do you see the offering in every step? This might be a sign that the participants have mapped their process, not the experience. Is that what you want?

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02 This tip comes from Jürgen Tanghe. See more of his advice in #TISDD chapter 6, Ideation.
Variation: One-Step Journey storming

One high-energy variant of ideation around future-state journeys is called “One-Step Journey.” This method, based on the old improvisation game “One-Word Story,” is a fast way to generate lots of rough journeys:

1. Arrange the team in a circle. Someone will kick off by briefly describing their idea for the first step of the journey.

2. The next person will fully accept that idea and describe what the second step would be.

3. The third person will build on that, and so on round and round the circle. If someone has no idea, they can just say “pass,” and the next person takes over.

4. To keep this moving fast, encourage participants to just describe the step, then draw or write it on a piece of paper after the next person has started.

5. When the journey is finished, the next person can start a new journey, or return to an interesting point in one of the completed journeys and explore alternative developments.

With a group who have some experience in thinking of journeys, this method can create five or six rough journeys in a quarter of an hour.
Dramatic arcs are introduced in #TiSDD 3.3, *Journey maps*. Thinking about the dramatic arc of an experience can give a whole new direction to ideation and help you focus your efforts.

**Step-by-step guide**

1. Take a visual representation of your experience, such as a journey map.

2. Consider customer engagement level at every step. Are they very involved, or more detached? If you have the opportunity to observe customers within the experience, this will be quite easy to see. If not, you will need to put yourself in the customers’ shoes and think through the experience. Generally, physical, face-to-face moments are more engaging than digital or paper ones. Mark the engagement level for each step in an extra perspective row on the map, from 1 (low engagement) to 5 (total engagement).

3. Reflect on the shape and rhythm of the whole arc. Is it over-loaded? Frontloaded? Are early promises fulfilled? Are the periods of low engagement or high engagement too long? Must a highlight be added, or – this is often more practical – should a less engaging step be spotlighted to increase engagement and show value more clearly?

4. (Recommended) Compare the dramatic arc to the emotional journey. Low points on the emotional journey which coincide with high points on the dramatic arc are moments when the experience is bad, and the customer is very aware of it – those moments need urgent attention! Ideally, your most satisfying moments will also be the highly engaging ones.

5. Use this reflection to focus your ideation around the experience.
System maps are a good starting point for ideation around new ways to create value, in particular by facilitating or improving relationships which are important to key stakeholders.

Based on an existing or quickly created system map, the group will look for ways to add value by adding, removing, or replacing elements, and examining the exchanges between stakeholders.

**Step-by-step guide**

1. Invite the right people to work beside your core team for the exercise (this might include people who know the background, people with no preconceptions, experts, representatives of the implementation team, people who will deliver the service, users, management, etc.).

2. If you have some current-state stakeholder maps, value network maps, or ecosystem maps, let the group familiarize themselves with them and, if practical, with the research behind them. If you don’t have
these maps, you might set up a quick assumption-based map, based on the experience of the people in the room. This is done most quickly if you use, say, Business Origami or a “constellation” method – see below. Basically, you run a quick version of the Co-creating system maps method. Of course, an assumption-based map is less reliable, but it can be useful to develop a feeling for the situation, especially if the group know their customers well.

3 Take one map at a time, and consider the following questions. It might be easier to place counters, figures, or Business Origami on the map, so you can make changes and see them easily. Write down all your insights, ideas, and open questions on a flipchart.

— For a stakeholder map:
Which relationships could be strengthened for the most impact? How might we do this? How could we help a key person on the map become a hero?
For value network maps and ecosystem maps:
Which value exchange could be facilitated for the most impact? How could we do this?

For any map: If some elements were removed from the map (think about one at a time), what would happen? How could the network still function without that element? What if another element was added, changed, weakened, or empowered?

How would you achieve this change? How would the stakeholders experience it? Perhaps you can augment the new maps with new journeys and service blueprints to explore the necessary frontline and backstage processes. Alternatively, go straight into prototyping these new offerings in more detail.

Variant technique for steps 2 & 3: Stakeholder constellation

Instead of making your map on paper or with figurines, you can use the people in the room. Ask a team member to represent one key stakeholder and stand in the middle of the room. Ask the group “Who is important to this person?” and add the other stakeholders one by one. Place people who are very important to each other close together, and form logical groups as you would on a paper map. Remember to look for stakeholders beyond stakeholders. For example, behind a school there is an education ministry and a government.

When you have the constellation set up, you can ask any of the preceding questions – but you can now ask them directly of the people in the constellation. “What do you need from him?” What would you do if she disappeared?” It’s surprising how easily the people in the constellation empathize with the stakeholders, and even start having little conversations with each other, speaking in the roles they represent.

Method notes

System maps can get very complicated quickly. Often, 5–7 key players is enough to get you started. But don’t oversimplify the complex – if the network truly is a complex one, zoom in and zoom out, modeling subnetworks as is useful.
PRE-IDEATION

“HOW MIGHT WE ...?”
TRIGGER QUESTIONS FROM INSIGHTS AND USER STORIES

An excellent, systematic method to prepare for ideation which bases ideas firmly on research and existing knowledge.

<table>
<thead>
<tr>
<th>Method</th>
<th>“HOW MIGHT WE ...?” TRIGGER QUESTIONS FROM INSIGHTS AND USER STORIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration</td>
<td>It is common to spread these activities across several days and spend hours or a whole day on each phase. In a sprint, a shallow version can be done more quickly. A break is useful before the third phase (invite outside experts, and ask them to prepare first ideas at home without the influence of groupthink).</td>
</tr>
<tr>
<td>Physical requirements</td>
<td>You will need key insights, JBTD (jobs to be done) insights, or user stories. Keep raw data nearby in case it is needed. In each phase you will need enough space to present the data or results of the previous phase, as well as pens and paper.</td>
</tr>
</tbody>
</table>
| Energy level | Phase 1: low to moderate  
Phase 2: low to moderate  
Phase 3: moderate to high |
| Facilitators | 1 or more |
| Participants | The different phases need different groups of people, although some people should take part in all phases.  
First phase (trigger questions): up to 15 people, preferably ones who are familiar with the research data or service context.  
Second phase (prioritization): 10 people or fewer who know the goals and strategy of your organization.  
Third phase (ideation): up to 20 people – a mix of people from the previous phases and outsiders or experts who understand the fields suggested by the questions. |
| Expected output | After you’ve gone through the three phases, you will have many ideas firmly rooted in your research. |
Developing trigger questions from insights and user stories is a good way to convert research into a wide range of actionable ideas. Use this method when you have good research or experience to build on, or when you need to take a step back from ideas and return to the needs and opportunities behind them.

This method has several phases. First, you take key insights, JBTD insights, or user stories, developed from research data (see #TiSDD 5.3, Methods of data visualization, synthesis, and analysis) and use them to generate trigger questions. Then you group these questions and decide which ones are most useful. In a final step, you generate multiple answers to these questions.

**Step-by-step guide**

1. **Phase 1: Developing trigger questions**

   - Start with the insights or user stories developed in your research activities. For example, you might have a key insight which looks like this:

   ### Key Insights

   **Alan**
   - **Persona, character, role**
   - **Wants** to eat less chocolate
   - **Because** it makes him fat
   - **But** it makes him feel safe.

   Thinking a little further, we might also develop questions like:

   - **How might we help Alan feel happy at his current weight?**
   - **How might we help Alan stay healthy?**
   - **How might we help Alan look great?**
   - **How might we help Alan know when he is really hungry, and when he is comfort eating?**

   - Try “laddering” insights for depth. For example, if your insight is “Alan wants to eat fewer cookies because he wants to lose weight …” follow this with “Alan wants to lose weight because …” Then take the answer to this question and feed it into a third insight, and so on. In each stage, the “because” statement of one insight becomes the “what” statement of a new one. You will soon come to the limits of your data, which could lead you to some more research.
2 Phase 2: Prioritize and select

Sort and group the trigger questions into useful clusters. These clusters or “opportunity areas” might be given names, or a few good questions might be chosen to represent the cluster.

Invite people who know the goals and strategy of your organization, as well as people who were part of the research project or who have useful experience. Display the clusters of trigger questions in a way which helps people build up an overview and see connections. You might want to have selected search results available nearby, in case some of the clusters are challenged or participants ask, “Where does that come from?”

Discuss, sort, and prioritize the clusters. Which ones should be worked on first? Which ones are off-strategy or off-brand?

3 Phase 3: Ideate

Look closely at the questions within the selected clusters, and consider what specialists you might need to invite. For example, if one cluster contains questions about helping people change their behavior, you might invite psychologists or coaches. Also invite people who might be involved in the later implementation of the ideas you will generate – like IT specialists or frontline staff. Of course, you will also need representatives of the research team or others with useful experience.

Start with your prioritized clusters and the trigger questions inside them.

Take an individual question and try to generate as many answers as possible for that question. (Use 10 plus 10, brainwriting, or whatever method fits the question best.)

Repeat until you have enough ideas or the quantity becomes unmanageable.

Now take your ideas into an idea selection step.
**Method notes**

- Almost anything can provide inspiration – but insights and user stories generated from one research project are not always applicable to another project. If in doubt, consult a research specialist.

- “How might we ...?” questions are useful if they allow a broad spectrum of answers. Sometimes participants are tempted to smuggle potential solutions into the trigger questions. For example, “How might we help young people balance food intake and exercise?” is a very useful question, but “How might we give young people a motion tracker and connected food tracking app?” has a very limited range of answers. Aim for the first type of question.

- Encourage participants to look beyond the obvious. As usual, the first ideas are the obvious ones. When it starts to get difficult, there is a potential for real novelty.
GENERATING MANY IDEAS

BRAINSTORMING

The most famous, quite familiar method for generating many ideas, fast.

Brainstorming (the term is often misused to describe all kinds of idea generation processes) is a specific group exercise which uses simple rules to help participants stay in a productive, nonjudgmental, highly divergent mode while producing many ideas.

Participants call out ideas which are written down on a board by a facilitator or scribe. This generates a pile of ideas quickly. Use brainstorming to find a starting point (or several starting points) for your work, to get to grips with the theme as a group, to widen the number of alternatives, or when you get stuck and need options.

**Step-by-step guide**

1. Make sure you are using the right method. Brainstorming will help the group quickly understand what the others are thinking and what the mood is around the subject, like “testing the water.” It’s also great when the group needs energy. If you want to generate more diverse ideas, and empower the less assertive group members, a quieter method like brainwriting might be better.

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**Duration**

- **Preparation:** up to 5 minutes
- **Activity:** 5–15 minutes plus discussion time

**Physical requirements**

One whiteboard or large paper sheet with pen, and enough space for everyone to stand or sit comfortably

**Energy level**

Medium to high

**Facilitators**

1

**Participants**

3–30

**Expected output**

Many ideas
2 Look at your starting point for ideation and consider if and how you will bring previous knowledge into the room (for example, as a research wall or as key insights).

3 Invite the right people to work beside your core team for the exercise (this might include people who know the background, people with no preconceptions, experts, representatives of the implementation team, people who will deliver the service, users, management, etc.).

4 Prepare your group with information and arrange them comfortably. They should all be able to see the board. The scribe(s) will need good pens and a clear, fast hand.

5 Remind the group of Osborn’s rules that they (a) refrain from criticism, (b) are open to wild or unusual ideas, (c) focus on quantity of ideas, and (d) build on the ideas of others.

6 Show the theme or key question on a poster or projector. (You might do an engaging warm-up after this to distract the participants for a few minutes.)

7 In brainstorming, ask the group to shout out their ideas or answers. Write their words legibly on the board.

8 When all ideas are on display you can group them under whatever criteria the group prefer, discuss them, and/or begin a selection technique.

Method notes

- Brainstorming is a surprisingly difficult exercise to facilitate well, probably because it is often badly run and has developed a reputation for being a low-value activity for “when we run out of ideas.” It’s also psychologically challenging and can be dominated by very assertive participants. If in doubt, go for brainwriting or another method.

- Stop before the exercise loses too much steam, but not at the first slowdown. The ideas which come when things get difficult can be especially interesting. Remind participants instead that wild or unusual ideas are welcome, and that ideas can be combined or reversed.

- Try suspending Osborn's rules and allowing criticism sometimes. There is evidence that this leads to more and better ideas, but it will need a group who are past politics and are able to give and receive constructive criticism with a positive attitude.

- You can combine brainstorming and brainwriting easily. One very effective method is to do brainwriting in groups, share the results, then ask each participant to do some solo brainstorming (scribble down a lot of ideas). You then repeat the process a few times.

- If they are hesitant to suggest more radical ideas, call a pause and ask them to talk quietly with a neighbor. Give them a minute to think of wilder ideas or combinations, then return to the brainstorm. They will be less shy about calling out these “team” ideas.

01 It can be useful to do a “Yes, and …” warm-up before this exercise, or remind people of the concept if they know it already. See #T1SDD 10.7.1, Warm-ups.

### BRAINWRITING

A great method for generating many ideas quickly; this one promotes diverse ideas and helps less assertive participants shine.

| Duration | Preparation: up to 5 minutes  
| Activity: 5–25 minutes plus discussion time |
|-----------|--------------------------------------------------|
| Physical requirements | Paper and pens for all participants, enough space for them to stand or sit comfortably and perhaps move around a little, one long wall where all the output can be shown, and sticky tape |
| Energy level | Low and thoughtful |
| Facilitators | 1 or more |
| Participants | A broad range – as few as 3 to as many as hundreds |
| Expected output | Many diverse ideas |

In brainwriting, individual participants work in parallel and in silence, writing their own ideas or observations on pieces of paper which are put to one side or passed on to the next writer. This method produces more ideas and far more diversity than brainstorming, but develops less energy as it is more quiet and thoughtful. Use it when ideas are more complex, when diversity is key, to empower less extroverted participants, or where the group is too large for brainstorming to be practical.

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**Step-by-step guide**

1. Make sure you are using the right method. Brainwriting is a great option for generating good and diverse ideas. But if you want to test the water first, helping the group quickly understand what the others are thinking and what the mood is around the subject, try brainstorming.

2. Look at your starting point for ideation and consider if and how you will bring previous knowledge into the room (for example, as a research wall or as key insights).

3. Invite the right people to work beside your core team for the exercise (this might include people who know the background, people with no preconceptions, experts, representatives of the implementation team, people who will deliver the service, users, management, etc.).

4. Prepare your group with information and arrange them comfortably. Everyone will need identical thickish pens and several sheets of identical paper or identical sticky notes.

5. Show the theme or key question on a poster or projector. (You might do an engaging warm-up after this to distract the participants for a few minutes.)

6. Ask the participants to work individually and silently, writing or sketching their ideas on paper or sticky notes. Instruct them on what to do with their sketches: pass them on to others for written comment and expansion, post them on a wall immediately for others to see (if the paper is big enough), or even keep the ideas for themselves until the end of the exercise.

7. At the end, display all the ideas on the wall. When all ideas are on display you can group them under whatever criteria the group prefer, discuss them, and/or begin a selection technique.
Method notes

→ When you are using any ideation methods which involve quick writing or scribbling, try to give the participants fairly thick (but not very thick) marker pens. These thicker pens will encourage large, legible (and documentable) script, and tend to prevent participants going into too much detail in writing or sketching. Forbid ballpoints and pencils if possible.

→ Stop the exercise before it loses too much steam, but not at the first slowdown. The ideas which come when things get difficult can be especially interesting. Remind them instead that wild or unusual ideas are welcome, and that ideas can be combined or reversed.

→ If they are hesitant to suggest more radical ideas, remind them that wild ideas are welcome and that all ideas are anonymous.

→ You can combine brainstorming and brainwriting easily. One very effective method is to do brainwriting in groups, share the results, then ask each participant to do some solo brainstorming (scribble down a lot of ideas). You then repeat the process a few times.◆

Brainwriting in silence produces more diverse output than brainstorming, and gives less assertive team members a voice.
The 10 plus 10 exercise\(^\text{01}\) is a great way to get started with a design challenge. Based on a common starting point, group members work individually to quickly sketch several ideas each, making around 10 ideas per group. They share the ideas within the group and choose one sketch as the starting point for the next round. After the second round, there are about 20 sketches per team on the table – a wide range of options from the first round, and a deeper drill from the second. All 20 are useful.

This method helps teams to quickly generate a broad variety of concepts, but also get some depth in understanding how a specific design challenge can be tackled. The visual approach helps them get specific.

### 10 PLUS 10

A very fast visual ideation method which combines breadth and depth of ideas.

**Duration**

<table>
<thead>
<tr>
<th>Preparation: up to 5 minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity: 20–40 minutes</td>
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</tbody>
</table>

**Physical requirements**

Paper (A4 or letter size is best) and pens for all participants, work area with tables

**Energy level**

Medium to high, depending on the time limit you choose

**Facilitators**

1 or more

**Participants**

Teams of 3–7 people

**Expected output**

Around 20 sketched concepts per team

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**Step-by-step guide**

1. Look at your starting point for ideation and consider if and how you will bring previous knowledge into the room (for example, as a research wall or as key insights).

2. Invite the right people to work beside your core team for the exercise (this might include people who know the background, people with no preconceptions, experts, representatives of the implementation team, people who will deliver the service, users, management, etc.).

3. After you have given the group a design challenge (e.g., a “How might we …?” question) and warmed up, divide the group into table-sized teams of 3–7 people.

4. Ask them to sketch different concepts that address the design challenge. They should draw rough pictures, which may have a few words of explanation. Tell them not to discuss the ideas, but to work individually and silently, drawing one sketch at a time on one piece of paper and then laying each one in the center of the table so others can look at it. Each team should generate 10 or more sketches in total.

5. Give the group about 15 person-minutes for the task (a 4-person team might get 4 minutes, while a 3-person team would get 5 minutes). Keep the time very short, so they are forced to produce simple, rough sketches. Give more time for more complex challenges, but keep it short enough to surprise the participants and make them hurry.

6. When the time is up, tell the participants to quickly share their own sketches with their tablemates. The whole immediate team (not the whole room) needs to understand what each of the 10 sketches represents.

7. Ask each team to quickly choose one of their sketches which seems interesting, and lay it in the middle of the table. The other sketches should be temporarily put to one side.

8. Repeat the first round with the chosen sketch as the starting point, making 10 variations of this. If the group need help understanding “variations,” you might mention changing the channel, the scale, the actors, the purpose, the timing, the technology, the material, the direction, the location … or the SCAMPER list of “Substitute, Combine, Adapt, Magnify, Put to other use, Eliminate, and Rearrange.”

9. Ask the participants to again share their new sketches with their immediate team members.

10. They can now also bring back the sketches from the first round which were laid aside. With the results of two rounds – one broad, and one deep – they now have about 20 explicit ideas to take into idea selection.

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Method notes

→ Some participants hate to draw. Remind them that only the person drawing needs to understand the sketches, that they are just memory aids. You might also start with a sketching warm-up (such as drawing your neighbor in one minute without looking at the paper) which shows that very bad sketches are usually quite adequate. Point out that drawings are especially useful as they suggest context and channel, and usually carry more information than a few words can.

→ Encourage participants to draw real things, not metaphors. For example, if they suggest a sales competition, they should draw salespeople actually comparing sales results or draw a screenshot of the online leaderboard – not a victory podium or a gold medal.

→ Some ideas are hard to draw. This method works very well for physical or digital interfaces and situations, but less well for abstract concepts.

→ Some ideas may occur more than once, but that is interesting in itself. Is it because they are obvious, or because they are especially interesting?
BODYSTORMING

A physical ideation method, sometimes called “brainstorming for the body.”

**Duration**

- **Preparation:** up to 5 minutes
- **Activity:** 15–60 minutes

**Physical requirements**

Optional props or prototyping material, access to the real service location or enough space to represent key functions of the environment

**Energy level**

High

**Facilitators**

1 or more

**Participants**

Teams of 3–7 people

**Expected output**

Lists of ideas, insights, or new questions; photos or videos of potential futures

Bodystorming is a physical exploration and discovery method which will generate ideas and understanding as well as quickly revealing assumptions and problems. It is very useful when the ideation challenge has physical or interpersonal aspects; when the group are tired of talking; or when a session needs empathy, energy, or a memorable highlight.

After a short immersion phase in the context of the challenge, the participants play through some ideas, taking on the roles of various stakeholders, groups, or platforms. For example, they might act out some variations of a sales pitch or advisory session, try different ways to serve a cup of coffee to someone with a lot of luggage, or take the part of a “landing page” interacting with customers and directing them to the right part of the website. As they go, they pause to record and reflect on their discoveries. Bodystorming is less structured and much faster than investigative rehearsal, but has less depth of discovery and insight.

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02 See #TiSDD 7.2, Prototyping methods.
Step-by-step guide

1. Look at your starting point for ideation and consider if and how you will bring previous knowledge into the room (for example, as a research wall or as key insights).

2. Invite the right people to work beside your core team for the exercise (this might include people who know the background, people with no preconceptions, experts, representatives of the implementation team, people who will deliver the service, users, management, etc.).

3. Immerse the group in the context of the challenge. If the group are not very familiar with the context, make a short visit to the location in operating hours and observe, without a specific brief. They might do some quick, informal interviews or use the service as customers. Sketch or photograph the physical environment for later reference, and take brief notes. If the group know the context well (e.g., after a research phase, or because they work or visit there often) this phase can be replaced by storytelling.

4. Most bodystorming practitioners prefer to bodystorm in the original service context. This can be inspirational, but can also be restrictive or impractical in many ways. If you prefer, use a workshop space, preparing any props or environmental context you need – for example, a table and a laptop might represent a counter and a cash register.

5. Use notes from the group’s immersion visit or previous experience to make a list of interesting situations or ideas.

6. Take one situation at a time and play around with it by acting it out. You might like to fix roles in advance, or let the group switch between them. There will be lots of laughter at the beginning, which is fine, but remember that this is work. As ideas for alternatives come up, try them out or park them.

7. Take notes on a flipchart to help the group remember what they discovered. Video is an alternative for very confident groups – but it is slow when you need to find something.

8. Repeat for other situations or ideas.

9. Reflect on your discoveries and choose which ideas to take forward, perhaps using an idea selection method.
Method notes

→ This method is very different from everyday work for many participants, and the group might feel embarrassed. Prepare them with framing and warm-ups. Warm-up games from improvisational theater like “Yes, and …” are great.

→ Some groups do just fine in an empty room without props and sets, but others find that having physical items helps them be more realistic.

→ Many groups will quickly slip into discussion. Remind them that discussion comes later, and encourage them to stay physical. Acting it out often makes discussions superfluous.

→ Some groups may find it hard to take this seriously. They can be helped by framing this as a prototyping method, or by giving them especially challenging situations to work on.

→ Some groups make their lives too easy and every idea will work straight away, with perfect customers and technology. The facilitator should challenge this, or make the situation more difficult – for example, by adding technical challenges (“delivery will be three months”), or by making a customer angry, skeptical, misinformed, or easily confused. You could invite less active participants to write potential problems on cards, and “play” them when the scene gets too easy.

→ For a deeper look at your ideation subject and the emotional experience of stakeholders, see also the methods Investigative rehearsal and Subtext in #TiSDD 7.2., Prototyping methods.
Ideation, creativity, brainstorming, and method cards (there are many names) are physical or digital cards which can be used in ideation sessions. There are many card sets available, and it is also common to create custom sets for particular contexts.

Depending on the set, the cards are used to promote discussion, to suggest new avenues of exploration, to structure thinking, and to spark ideas. Cards can be especially useful when the group feels stuck, or is unable to move away from familiar thinking. They can also help solve a deadlock by introducing a neutral, random arbiter: the chance factor.

Every card set comes with its own instructions. Generally, each card contains a short text, perhaps with an image, which will prompt a new approach to the work or promote thinking. These might be questions, analogies, patterns, or more, designed to stimulate new avenues of thought. The cards often suggest a new way to look at a problem. The Oblique Strategies\textsuperscript{01} set, initially developed for musicians and other artists in 1975 by

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Brian Eno and Peter Schmidt, is one of the most remarkable. Each card here offers a suggestion which can range from the technical (“change instrument roles,” “mute and continue”) to the conceptual (“faced with a choice, do both,” “don’t be afraid of things because they are easy to do”) or even the very human (“get a neck massage” or “tape your mouth shut”). Any of these cards could be useful in an ideation session, so the group can decide to draw one or many, or simply keep drawing until they no longer need them.

In many cases, a list (like the SCAMPER list by Alex Osborn, developed by Roger Eberle) will fulfill the function of a card set.

Card sets can function as checklists, covering all the aspects which might be considered – so if you work through the cards, you won’t forget anything important. Checklist cards can also be used for prioritizing, by simply sorting out the most important ones, or they can form the headings around which you cluster your ideas and observations.

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A Cards can help focus or diversify an ideation session – or break a deadlock.
Step-by-step guide

The process of using a card set will vary from set to set, so read the instructions. But remember:

1. Look at your starting point for ideation and consider if and how you will bring previous knowledge into the room (for example, as a research wall or as key insights).

2. Invite the right people to work beside your core team for the exercise (this might include people who know the background, people with no preconceptions, experts, representatives of the implementation team, people who will deliver the service, users, management, etc.).

3. If the primary purpose of your card exercise is ideation, the group will benefit from warming up. Any warm-ups centered on making associations and building on each other’s ideas will be useful here.

4. Push beyond the obvious. In practical terms, this means you should spend a little longer on each card than the group wants to.

Method notes

Card decks can be hacked, so if the suggested methodology doesn’t feel right, change it. But spend some time using the basic methodology first, to make sure you really understand what you are hacking. Every jazz musician knows his scales. ▶
ADDITION DEPTH AND DIVERSITY

IDEATION BASED ON ANALOGIES AND ASSOCIATION

Instead of trying to create ideas from nothing, translate and adapt existing solutions or look for links to random stimuli.

<table>
<thead>
<tr>
<th>Duration</th>
<th>Preparation: if you need to prepare some good analogies in advance, this can take some hours. Alternatively, let the group find their own analogies (this is not easy), or use association to random input. Activity: 20–60 minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical requirements</td>
<td>Analogies might be presented as cards which you will need to produce; you will also need space to make notes</td>
</tr>
<tr>
<td>Energy level</td>
<td>Low to medium for analogies Medium, fun for associations</td>
</tr>
<tr>
<td>Facilitators</td>
<td>1</td>
</tr>
<tr>
<td>Participants</td>
<td>Teams of 3–7 people</td>
</tr>
<tr>
<td>Expected output</td>
<td>Ideas, insights, or new questions</td>
</tr>
</tbody>
</table>

Let’s imagine you are faced with a new Problem A. You know that the familiar Problem B is essentially similar – or analogous – to Problem A. So, instead of thinking about Problem A, you look at existing or novel solutions to Problem B, and then adapt these solutions back to Problem A. Analogies let us adapt ideas which already exist, so this method can be a very useful kick-starter if the group is stuck. They can also make a difficult problem seem more manageable. They are especially valuable when good analogies can be prepared.01

Associations work in a similar way to analogies, but also help us reframe the problem and think about it in new ways. You could try to find associations with a randomly chosen word or image. If you were ideating on social media use, for example, you might randomly select a picture of a duck from a set. You might then ask yourself questions like “What kind of protective ‘feathers’ could cause social media to slip off a consumer, like water off a duck’s back?” “How could we help a consumer seem calm ‘above water’ while working hard to process social media ‘underwater’?” and so on.

01 Analogies are often drawn from nature – in this case, we talk about “biomimicry.”
**Step-by-step guide**

1. Look at your starting point for ideation and consider if and how you will bring previous knowledge into the room (for example, as a research wall or as key insights).

2. Invite the right people to work beside your core team for the exercise (this might include people who know the background, people with no preconceptions, experts, representatives of the implementation team, people who will deliver the service, users, management, etc.).

3. For analogies, skip to step 4. For random association, choose some random words, phrases, or images which will be useful. Open a book at random, or use one of the many random word and image generators online. Then skip to step 6.

4. Prepare your analogies. This is hard, but it gets easier with experience. The basic process is to reduce the challenge to its essential characteristics, try to separate it from its context, and use this as a starting point to look for similar contexts. For example, if you are searching for innovative traffic flow solutions, you might boil this down to a need to “coordinate a smooth flow of elements in a complex system.” This would lead you to analogies like blood circulation, liquids engineering, plumbing, logistics, even finance. (And it might prompt you to invite doctors, engineers, plumbers, logisticians, or economists to your ideation session.)

   To get there, ask yourself: Who, or which discipline, has already solved a similar problem? In what context would you experience similar challenges or situations? What does the challenge remind you of?

5. Select the best analogies. Think about how close each analogy is to the original challenge – in the traffic flow example, logistics would be a “near field” analogy, but medicine and finance would be “far.” For more novel ideas, it seems useful to use “far” analogies – even though they are tougher to work with and actually generate fewer ideas. Less common (and hence less familiar) analogies also seem more helpful than common ones, so avoid analogies which the group have used too often before.

6. Set up in workable table-sized groups. Invite the groups to stop thinking about the initial challenge (perhaps run an intense warm-up to help them), and consider one of the analogies or associations instead. What does it suggest to them? How have similar problems been conquered there? For example, if the group are working on a service to help people consume social media responsibly, they might look at solutions around other types of overconsumption, like eating. Many of the principles of managed eating – reward systems, tracking the amount eaten – could be easily transferred to social media use. Make notes.

7. Repeat for other analogies or associations.

8. Now consider your notes in the context of the original challenge. Can the ideas and experience be translated? What ideas do they give you?

9. Take your (translated) ideas into an idea selection stage.

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Method notes

→ If you are using other ideation methods as well, try them before you switch to analogies or associations. Most groups find it easier to work “closer to home” at first, before opening up.

→ Some groups find it hard to take random associations seriously until they have experienced its successful use. Explain its pedigree as an ideation technique, or ask them to simply suspend judgment until after the exercise.

→ If an association seems difficult, stick with it. Or build a chain of associations – cake leads to baker leads to flour leads to flower leads to garden leads to summer – and look at each one.


Random words or images can be used to diversify and unblock ideation. Use random word or image generators online, open a book at random, or make your own card sets.
A crowd of people stand in front of a wall of sticky notes. The people are arranged in rows. The front row actively sorts the notes; the rows behind them have various support or preparation functions. Every few seconds, the rows cycle so a new group of people come to the front and every row gets a new role. After a few cycles, the sticky notes are sorted and the group know the content.

Octopus clustering will quickly transform a random cloud of sticky notes into a series of clusters. Use it to sort large numbers of ideas, insights, “How might we ...?” questions, data – anything which can be expressed as a few words or a picture on a sticky note. The method gives everyone an excellent overview of what the material is, and encourages shared ownership of ideas between group members. The new clusters might help the group understand the overarching structure of the material, or suggest different directions for the next step.

Though the description here seems complex, in practice the exercise is very simple and great fun. The following guide takes you through how to set it up, step by step. After you have done it once or twice, most of this will seem obvious.
Octopus clustering. In this very large group, five rows of participants sort dozens of sticky notes in minutes. Note the engagement, and how the second row is actively supporting while the third, fourth, and fifth rows discuss the overarching structure, preparing to step forward into more active roles.
**Step-by-step guide**

1. Set up rows of people in front of the wall. You will need 3–5 rows. First, ask for volunteers to form the first row in front of the wall. Point out that their row is the same width as the wall. Point out that, like an octopus, they have many arms.

2. Ask for volunteers for the second row. Point out that the two rows will not mix.

3. Add more rows until everyone is in a row. Ask everyone to be aware which row they are in, and to never mix rows. If the last row is shorter, that is no problem.

4. Explain what to expect:
   - In a minute, I will ask you to start sorting the sticky notes. Your role in this task depends on where you are standing. Your roles will change.
   - If you are in the front row, you will be actively moving and grouping notes in whatever way makes sense to you. Never cover a note with another note.
   - If you are in the second row, you will be actively coaching the first row. Be loud and helpful!
   - If you are in the third row, you should aim for an overview of what is happening and look for lost stickies. Shout some suggestions to the rows in front. If you are in the fourth (or fifth) row, discuss with your neighbors, look for that overview and be ready to start giving advice in a few seconds’ time.
   - Every 30 seconds or so during the exercise, I will say, “Empty hands! Come out! Step forward!” When I say “Empty hands,” the people in the first row should quickly get rid of whatever note they are holding by passing it to the person behind them. When I say “Come out,” the first row will turn left and come out of the group on the left side. They will then go to the back of the group, fill up the last row and start a new row. On “Step forward,” everyone will step forward into new roles and start sorting. OK?

5. Start the exercise. After about 20 or 30 seconds (not much longer), call out “Empty hands! Come out! Step forward!” Give people just enough time to complete each of these simple steps.

6. You might need to remind the people who have stepped forward of their new roles. As the first row come out, direct them to the back of the group.

7. Repeat the cycle every 30 seconds or so. When you notice clusters starting to concretize, draw the sorters’ attention to the “orphan” notes that are left over. You might pause the exercise for this, or just keep rolling.

8. After 5–8 cycles, the sorting is usually complete. Warn the next row that they are the last row, and finish with applause.

9. Step back to get an overview. Ask the group if they want to merge any groups. Ask for headings for the clusters and label them in another note color.
Method notes

→ Keep this fast-moving and light. Music is helpful. Encourage all the rows to be actively engaged.

→ Do not make more than five or six rows. If you have a lot of people in the group, make the cloud of sticky notes and the rows wider. If you have five or six rows, keep the cycles very short or the rear rows will get bored and lose concentration.

→ When the first clusters are forming, try giving the people in the third or fourth row some differently colored sticky notes and pens. They will usually start making cluster headings. Invite subsequent rows to challenge and subdivide these headings. Keep those pens and sticky note pads in the middle rows; they can pass individual notes forward.

→ At the end of the exercise, people have been working fast and physically close to each other (that might not be appropriate in some cultures). In itself, the exercise is a great warm-up. Also, now everyone has touched many notes, and the notes are crumpled and tired. The group are losing ownership of the ideas, and will be ready to leave them behind to move forward.

→ Like any clustering exercise, this can produce “orphans” – notes with no clear affinity to a cluster. Because they are “left over,” they are easy to ignore – but they can be very useful and unusual ideas or data. Make sure when you make your cluster headings that you do not ignore these – even if that means making a heading for a single sticky note.

→ Sometimes, you will have “black holes” – one or two very large clusters. If necessary, point this out (it’s best to tell the rear rows) and run more rounds explicitly to break up these large clusters.
BENNY HILL SORTING (“THIRTY FIVE”)

A fast, energetic way to quickly choose the most interesting or popular options from a large group of possibilities. This is a more energetic interpretation of the game “Thirty Five” by Thiagi.01

Duration
Participants will need to prepare their pieces of paper, unless they already have them in a suitable form. This might take a couple of minutes, depending on the complexity of the ideas. The game itself needs about 10 to 15 minutes, plus some time to check that the “winning” papers are useful and diverse.

Physical requirements
You need enough space for everyone to move about safely, but not so much space that the crowd spreads out; each person needs a pen and one piece of paper which has one sketch, idea, or insight on it.

Energy level
Very high

Facilitators
1, perhaps more for very large groups

Participants
12–300 people

Expected output
Ranking of all the ideas, insights, or other content

This tool will take a large number of items (one per person) and quickly rank them according to whatever criteria you decide. Use it after an ideation or pitching session to select the ideas or pitches which the group find most interesting, or use it at the start of a session to agree on priorities for the session, rules of cooperation, and so on.

Everyone stands in a group holding a piece of paper. They move through the group, exchanging papers randomly and repeatedly. Then, in pairs, they compare the two papers they’re holding and assign points to each. The exercise repeats several times and the results for each paper are summed.

As well as producing a ranking of the items, this exercise also thoroughly mixes them, starts to establish co-ownership, and leaves the idea papers looking tired and used – which can be helpful if the group have trouble letting go of their ideas.

01 For more, see http://www.thiagi.com.
Step-by-step guide

1. Ask each of the participants to prepare their pitch, sketch, idea, insight, or whatever on a piece of paper. It is vital that someone should be able to look at the paper and understand the idea in about 15 seconds – the papers must “speak for themselves.” Most participants find this challenging, so ask them to test their papers with a neighbor or two and iterate if necessary.

2. Invite the group into a tight but physically safe space. Everyone should be holding their pitch or idea written in one sentence or as a sketch on one piece of paper. Everyone should have a fairly thick pen.

3. Explain steps 4–7 briefly. (Later, talk the participants through the first round or two).

4. With loud music playing (“Yakety Sax,” the Benny Hill theme, is popular), have everyone move through the crowd, switching papers with everyone they meet. After a few seconds, stop the music.
5. Everyone is now holding a pitch. They form into pairs, with the nearest person.

6. The pairs have one minute (or less) to compare the pitches on their two papers, and assign 7 “interestness points” between the two ideas. They can assign 7:0, 4:3, or anything in between. They must spend all the points, and they may not assign half-points. They should write the points allocated to each paper on the back of that paper.

7. Start the music again, and repeat the cycle – move around switching papers, stop and find a partner, assign 7 points, move around switching papers …

8. After about five cycles, stop the exercise after a mixing round. Everyone is now holding a (probably unfamiliar) piece of paper with an idea and a number of points written on it. They add up the points, and can easily see which ideas most interest the group. These might not be the ones you decide to keep, but it is a good start.

9. If needed, use a method like a Floor Gallery or Coraling to form several work groups around these ideas.

Method notes

- “Thirty Five” is the original name of this method. We use an alternative name that is more familiar to many in the service design community.

- If participants find themselves holding their own papers, ask them, with a smile, to “deal with it.”

- If there is an uneven number of participants, you will always have one group of 3. Ask them to assign a total of 10 points between their 3 papers, with no paper getting more than 7 points. Remind them they will need to work especially fast.

- Encourage the group, once they have assigned the points, to hold their papers in the air. This makes it easy to see who has finished.

- Sometimes a paper will have a number missing on the back. This is usually because someone has forgotten to write down a “0.” Don’t worry about it.

- Some might call this an “n=5 sequential cumulative random peer-pair zero-sum comparison” – however, we prefer “Benny Hill sorting.”

- To see one version of this activity in action, visit http://bit.do/BennyHillSorting.

01 You might decide on other criteria, like customer impact or feasibility – but consider that it is very hard to judge these things from a quick sketch. A very general “importance” (or “rock-and-roll”) scale is probably more useful.
IDEA PORTFOLIO

A more analytical selection method for a quick but quite reliable sorting of ideas or concepts.

In an idea portfolio, ideas are ranked according to two variables and arranged on a portfolio or graph. Because two variables are used, the method can balance different needs and appeals to analytical mindsets. It is a great way to prepare the groundwork for an informed decision, and even allows a strategic view of the options.

**Step-by-step guide**

1. Consider if and how you will bring previous knowledge into the room (for example, as a research wall or as key insights).

2. Invite the right people to work beside your core team for the exercise (this might include people who know the background, people with no preconceptions, experts, representatives of the implementation team, people who will deliver the service, users, management, etc.).

3. Decide on your criteria. “Impact on customer experience” against “feasibility” seems to work well, but other criteria work too (see the “Method notes”).

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**Duration**

**Preparation:** a few minutes to mark axes on the wall space, if you like  
**Activity:** depending on the number of ideas, from 10–40 minutes

**Physical requirements**

You need a group of ideas or pitches written on individual pieces of paper – perhaps as sketches. Some wall space, floor space, or a pinboard is useful.

**Energy level**

Low and thoughtful

**Facilitators**

1

**Participants**

1 or more

**Expected output**

A visual arrangement of the ideas, ranked along two axes
4. Mark up a portfolio (graph) on the wall or floor, with your two axes clearly labeled.

5. Take one idea at a time. Ask the group (or a subgroup) to rate it according to the two criteria, assigning 0 to 10 points for each variable. They might write the points on the paper, or position it directly on the portfolio.

6. Take the next idea, and continue arranging the ideas on the portfolio.

7. You can now decide which ideas you want to continue investigating. Often the ideas with high impact and high feasibility are your low-hanging fruit, and are usually the most interesting. But other ideas should be considered too: you will want a varied selection, and you might include some ideas from other areas of the portfolio for their long-term benefit, or because your low-hanging fruit are already picked.

A typical idea portfolio. The “low-hanging fruit” are circled – these might not be the ideas you finally choose to explore.

If there is space, an idea portfolio can be marked out on the floor or walls. This lets you use the original sketches on the portfolio, making it easier to draw connections and remember what was what.
Method notes

→ This is the kind of visualization which marketing and finance folks really like. It’s a good way to include them (and their knowledge) in the process.

→ Like with many “decision” tools, the discussion you have while using the tool is as important as the tool itself.

→ Participants are sometimes dissatisfied with the dimension “feasibility.” In fact, it represents a collection of problem factors, such as cost, legal hurdles, manpower, resources, knowledge, strategic fit, brand fit, technical practicality, and so on. If teams are keen to use a more specific dimension – financial cost is very popular – ask them if they are confident enough to forecast that based on a rough sketch. They are then usually happy to return to a more generalized view.

→ Some useful questions when assessing the impact on the customer experience are: Does it feel good? Does it take away or reduce customer pain? Are competitors doing it? Can we make money from it (business impact)? Does it create strategic advantage?

→ Other useful dimensions might be “time to market,” “fit to brand,” “impact on employee satisfaction,” “revenue potential,” “team interest,” and so on.

→ If the space available to hang your papers is too small, title each paper and hang sticky notes with titles instead (don’t use numbers). Remember, though, that looking back and forth between these notes and the ideas themselves is hard cognitive work. When the papers hang directly on the portfolio, connections and contrasts are far more apparent.
A more analytical approach to decision making to use when multiple factors need to be taken into account.

If your decision is based on multiple criteria, one- or two-dimensional approaches (for example, the idea portfolio) might not seem enough. A decision matrix allows multiple weighted criteria to be incorporated in the decision, but lets us consider them one at a time.

The options available are listed along one axis of a table; the various decision factors along the other. The decision factors may be weighted. The team consider each criterion for each option and give it a value, modified by the weighting. The arithmetical result suggests which option to address first. This method is especially welcomed by analytical thinkers.

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**Duration**

**Preparation:** the preparation of this exercise, especially collecting decision factors and weighting them, is a valuable part of the activity itself and may take from 15 minutes to several hours

**Activity:** depending on the number of ideas, from 20–60 minutes

**Physical requirements**

A set of options, and space to write up a table

**Energy level**

Low and thoughtful

**Facilitators**

1

**Participants**

1 or more

**Expected output**

A numerical evaluation of each option

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Step-by-step guide

1. Consider if and how you will bring previous knowledge into the room (for example, as a research wall or as key insights).

2. Invite the right people to work beside your core team for the exercise (this might include people who know the background, people with no preconceptions, experts, representatives of the implementation team, people who will deliver the service, users, management, etc.).

3. Collect your potential options. For example, in a wayfinding project the options might be new signage, a system of touchscreens, human helpers, or a digital app. Write them as headings for the rows of a table.

4. Consider the factors or criteria which will guide your decision: for example, implementation cost, fit to brand, time to implement, impact on customer satisfaction, maintenance cost. Write these as headings for the columns of the table.

5. If you want, give each decision factor a weighting. Be careful – small differences in weighting will strongly affect the outcome.

6. For each idea, assign a value on a fixed scale (0 to 5 is good) for each factor. Multiply the value by the appropriate weighting and write it in the box.

7. Continue for all ideas. Write total values for each idea in the last column.

8. The idea with the highest total value is the one to consider first, but you should choose a mixed group to take forward.
**Method notes**

- This is an MCDA (multiple criteria decision analysis) technique. Look into that term for more options and background.

- Like with many “decision” tools, the discussion you have while using the tool – even while setting up the decision factors and weighting – is as important as the tool itself.

- This particular tool can lead to very long discussions, on both the weighting and the values. Often, teams are basically guessing values – they do not know enough about the individual options to make a reliable estimate. Draw attention to this, and perhaps use the tool to highlight those gaps in understanding. Once they have been identified, use research or prototyping to inform or replace the discussion.

- A wide variety of decision matrix templates are available online. Like all decision tools, this does not make the decision, but supports the process and the conversation around it.
REDUCING OPTIONS

QUICK VOTING METHODS

Dot voting, nose-picking, barometers – quick ways to get the majority view, mostly for larger groups.

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**Duration**

Preparation: almost none, except for barometers, where it might take a few minutes to hang up the papers

Activity: from a few seconds (nose-picking) to a few minutes

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**Physical requirements**

Pens, sticky notes, or voting dots. You might prepare special “barometer” papers, or just use sticky notes.

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**Energy level**

Medium, high for some variations

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**Facilitators**

1

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**Participants**

From 3 to all the people in the room

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**Expected output**

Rough estimate of majority interests

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There are many techniques which can be used to see what the majority is feeling, from a show of hands to more complex and engaging methods. Some allow each person a single vote, some allow multiple votes, and some allow people to express their reactions to all ideas. Use these techniques to get a sense of which ideas, insights, or data are most interesting to the most people without having a long discussion.

**Variations**

— Dot voting is a familiar method where participants are given sticky dots or thick pens to mark their choices. Material is displayed around the room (perhaps pinned to walls or displayed on tables), and participants move around the space, marking the items that deserve more attention. Usually, each person is allowed to make a fixed number of votes; sometimes they are allowed to “spend” multiple votes on the same item. At the end, you can easily see which items have the most votes.

— Often, the need for “consensus” or “fairness” will push a team into a discussion of alternatives – which
QUICK VOTING METHODS

Quick voting methods are a very quick method for teams or small groups to see if they agree. To vote, each team member puts one finger on their nose; they count together to three and each quickly put that finger on their preferred item. Anyone who hesitates, even for a split second, has lost her vote. If there is a tie, discount all the other items, briefly discuss the favorites, and vote again on the tied items. If there is still a tie, toss a coin.

**Method notes**

- **Nose-picking** is a very quick method for teams or small groups to see if they agree. To vote, each team member puts one finger on their nose; they count together to three and each quickly put that finger on their preferred item. Anyone who hesitates, even for a split second, has lost her vote. If there is a tie, discount all the other items, briefly discuss the favorites, and vote again on the tied items. If there is still a tie, toss a coin.

- **Barometers** are a quick way to get everyone’s view on every item. There are two ways to do this. In the first method, you hang or draw a simple “barometer” – say, a Likert scale from –2 to +2 – on every item. The participants go around the room and place a pen mark or dot to show their “vote” for each item. In the second version, you give everyone a bright sticky note and ask them to hold it high over their heads (“I like it”), low by their knees (“I hate it”), or somewhere in between to vote for each item. (If you have no sticky notes, applause works in the same way.) Go around the room and ask for the participants’ opinion of each item, estimating an average. Unlike the first method, this one gives an average, not a spread of votes.

- These are quick methods to judge the interest of the group, not robust survey methods. Treat the results as an information point, not a decision. Is there a balance? Is there a wide enough range? Are there some risky, weird, or much-loved ideas which need to be kept in as “dark horse” prototypes? Are ideas already implemented somewhere, or have they already failed? Make a conscious decision based on the voting (don’t let the voting decide), then take a handful of ideas forward.
REDUCING OPTIONS

PHYSICAL COMMITMENT

Quickly pinpoint the most popular ideas and form teams of interested people who will work together for the next stage. For larger groups.

**Duration**

Preparation: Coraling is used when you already have ideas on the wall, so it needs no preparation. A Floor Gallery will need a few minutes to lay out the papers or prototypes on the floor. Each exercise takes about 3 to 5 minutes, plus some additional time for adjustments if necessary.

**Physical requirements**

A Floor Gallery needs the items for selection and some space where the items can be laid on the floor and everyone can stand and move around a little. The Coraling method also needs some space, but the items – usually clusters of sticky notes – can be left on the wall.

**Energy level**

Medium to high

**Facilitators**

1

**Participants**

Groups of more than 10 people

**Expected output**

Groups of people who share a common interest

In these methods, participants vote with their bodies, so everyone can always see who is in which group, and any changes are quick, easy, and obvious.

In the Floor Gallery version, participants stand in groups around the items they like. Use this version when the items to be chosen are fairly large and might take a little time to read – like elevator pitches, idea sketches, or service ads.

In Coraling, they form lines and branches like coral growing from an item on a wall. Use this variant for clusters of sticky notes, or anything which cannot be easily removed from the wall.

Use these methods when you want to decide which ideas to work on next, and quickly form new workgroups. Use them to split up the group for the next task of a workshop, not to form long-term teams for a project.
**Step-by-step guide**

1. For a Floor Gallery, lay out the items on the floor, and ask the participants to walk around and familiarize themselves with all the items while thinking about which one they would like to invest some time in. If they are drawn to an item, they might start to wait there. If they are sure, they will stop there and put their foot on that item. In Coraling, the items can stay hanging on the wall. If someone would like to work on an item (or cluster of sticky notes, or whatever), ask them to put their hand on it. The next person will put their hand on the first person’s shoulder, and so on. Depending on space, they may form a chain or a branching “coral.”

2. In both cases, people who are unsure can look at the groups forming and decide where they can be most useful, or they can hang back and let the facilitator allocate them.

3. Now invite the participants to look at the groups they have formed. Are they viable? Depending on the next exercise, are they too small, too large? Who might be persuaded to change groups and help out elsewhere? Which groups are simply too small and must fold?

**Method notes**

- These methods will often form unbalanced groups, where similar people group together and where skillsets might not be evenly represented. This is not a problem if the groups are just being formed for the next stage of a workshop, and in fact sometimes a group of specialists can push an idea very far, very fast. (It would be a different story if they were to be longer-lived project teams.) If a certain mix of skills or viewpoints is important for the next step, address this when adjusting the groups, or ask participants to consider this when forming groups. Badges showing skills or background can help.
In a Floor Gallery, encourage people to stand on (not near) the papers which interest them. The papers will get torn and dirty, which will help the teams to leave them behind and move on happily.

Often you will have one item which the group agrees is very important and promising – but when the groups form, no one wants to work on it. Stop the selection process and reflect with the group on the project’s goals and responsibilities. Can we really go on without this option?

These exercises put people in close physical proximity. While this can really help group dynamics, it might not be appropriate in some cultures.

Coraling to form workgroups. Participants at a workshop start to choose clusters which interest them and place hands on others’ shoulders to “join up.”

In a Floor Gallery, the options are spread out on the floor, and team members stand on the ones they are interested in.