



# design thinking workshop

Corporate Center interns

July 11, 2023 – Part 1



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# agenda



## Part 1 Virtual Kickoff – 7/12/2023

Welcome & Intros

Design Process Overview

Problem Statement

Discover: Review & Practice

Analyze: Review

# The Key Design Studio

## who we are

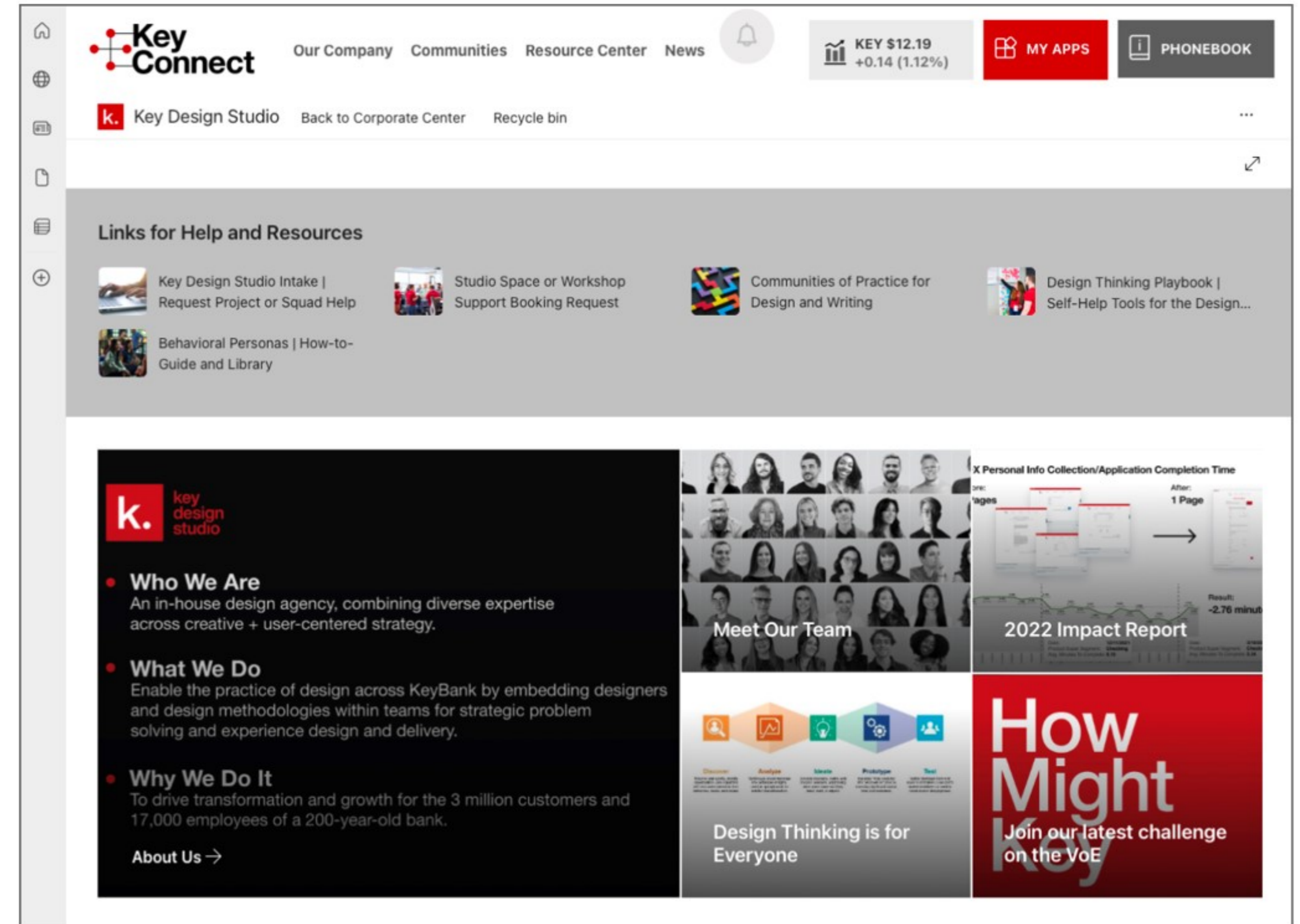
We are a diverse, inter-disciplinary team with extensive expertise across all areas of user-centered strategy + creative.

## what we do

Enable the practice of design across KeyBank by embedding designers and design processes within teams for strategic problem solving and experience design and delivery.

## why we do it

To drive transformation and growth for the 3 million customers and 17,000 employees of a 200-year-old bank.



Design Studio SharePoint

Design Thinking Tools

Design is a verb, not a noun.

Design is a mindset and approach to user-centered, iterative, intentional problem solving.

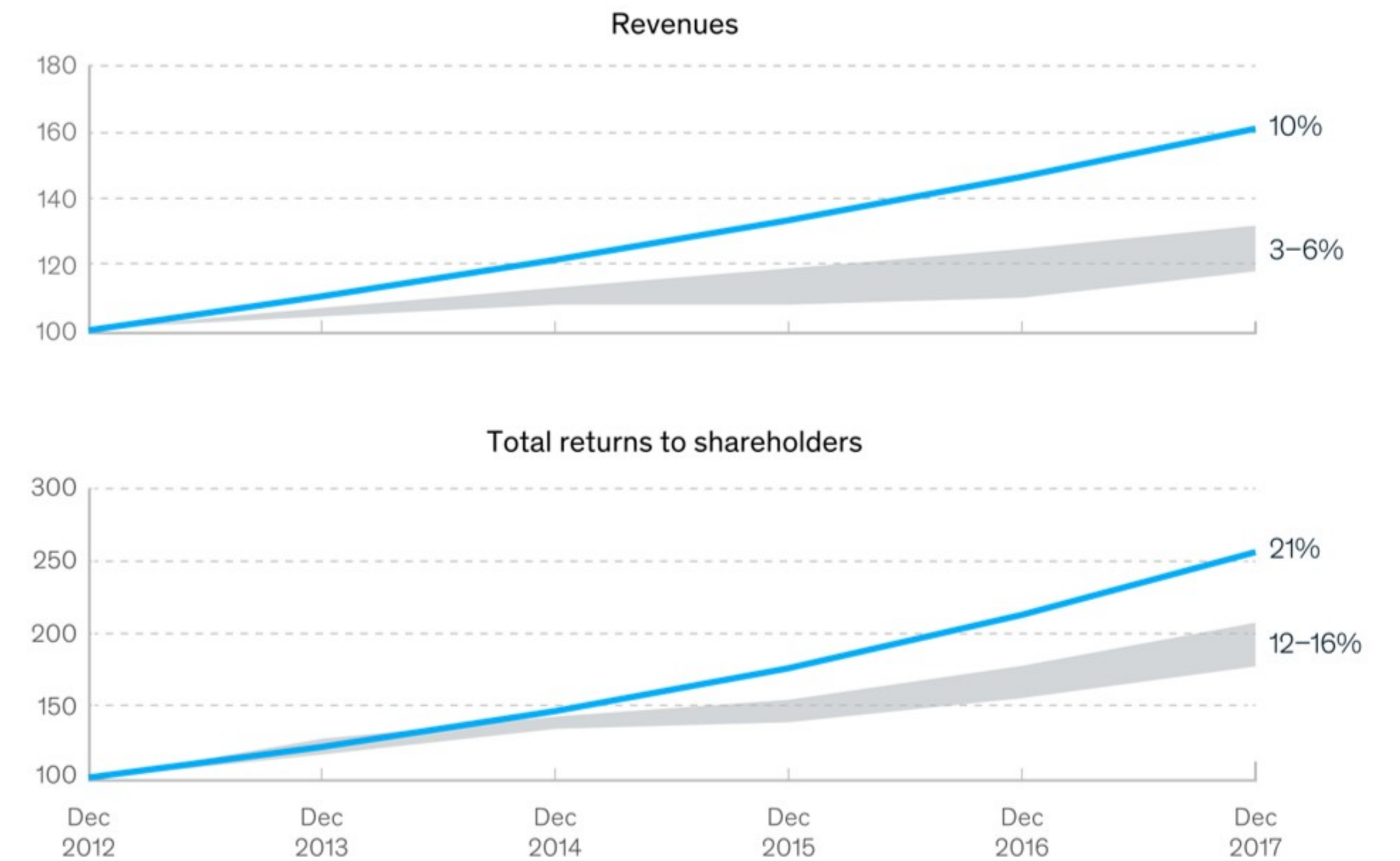
# What impact can design create?

- 50% of design-led companies report more loyal customers.
- Three of the most common reasons a project fails relate to a user-centered design misstep.
- 69% of design-led firms say that innovation is more efficient with design thinking.
- Every dollar invested in UX returns \$10 to \$100.
- Design-led companies outperform the S&P 500 by 219%.

Companies with top-quartile McKinsey Design Index scores outperformed industry-benchmark growth by as much as two to one.

Annual growth (normalized), %

— Top-quartile McKinsey Design Index performers  
 ■ Industry benchmarks<sup>1</sup>



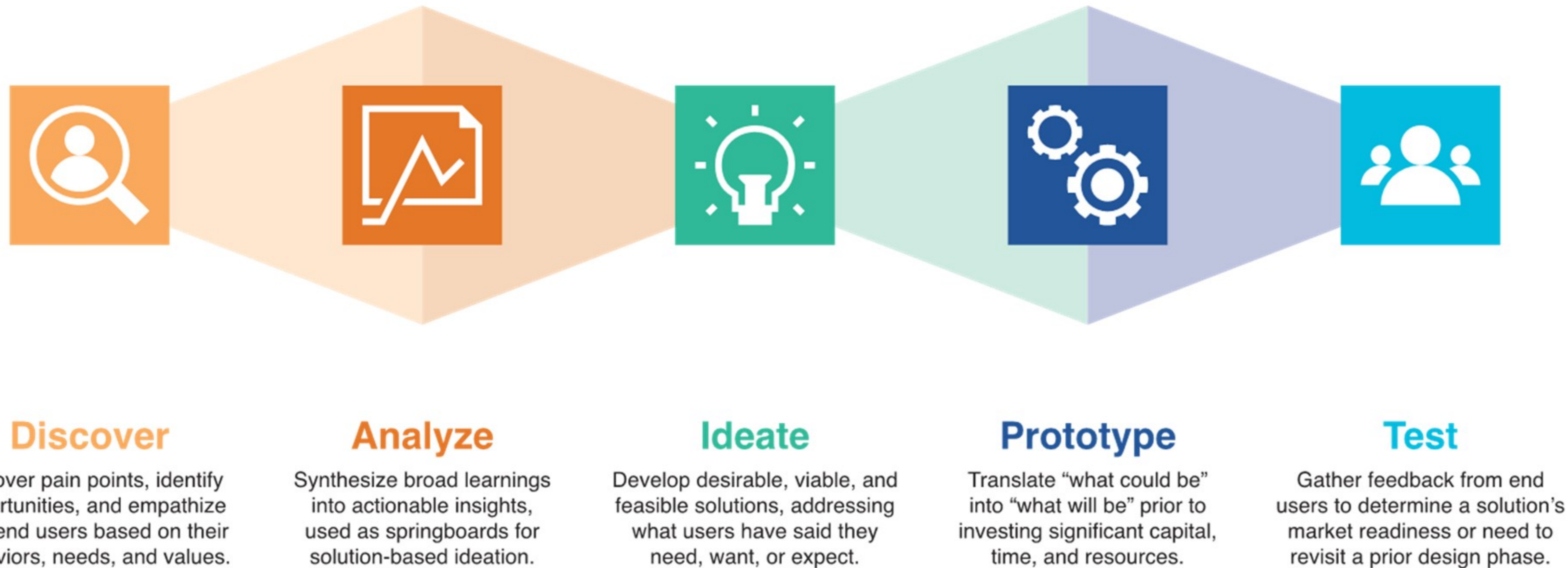
<sup>1</sup>The envelope was set by the minimums and maximums of three independent data sets: MDI 2nd, 3rd, and 4th quartiles; the S&P 500; and a McKinsey corporate database of 40,000 companies.

McKinsey  
& Company

# Key's Design Thinking Process

Design Thinking is a creative, user-centered approach to problem solving.

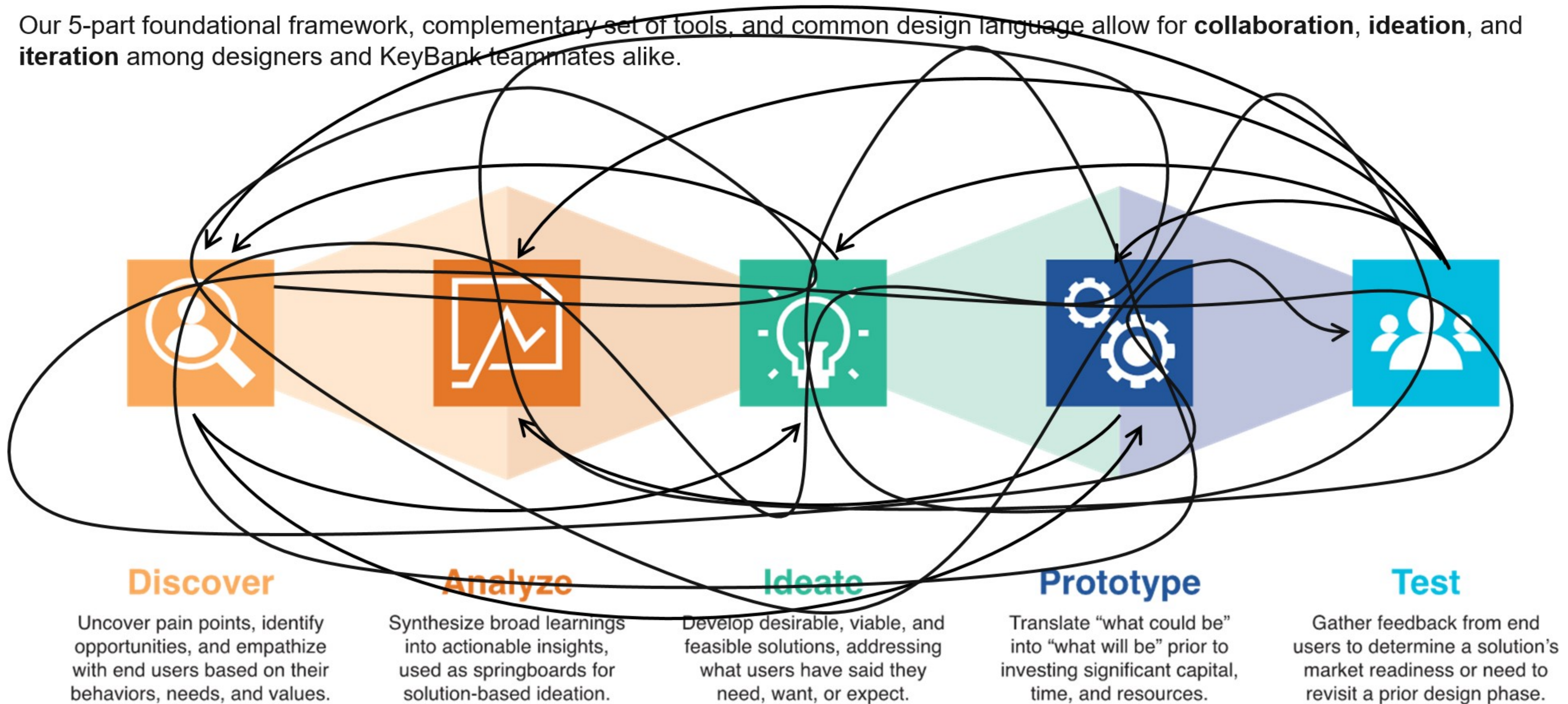
Our 5-part foundational framework, complementary set of tools, and common design language allow for **collaboration**, **ideation**, and **iteration** among designers and KeyBank teammates alike.



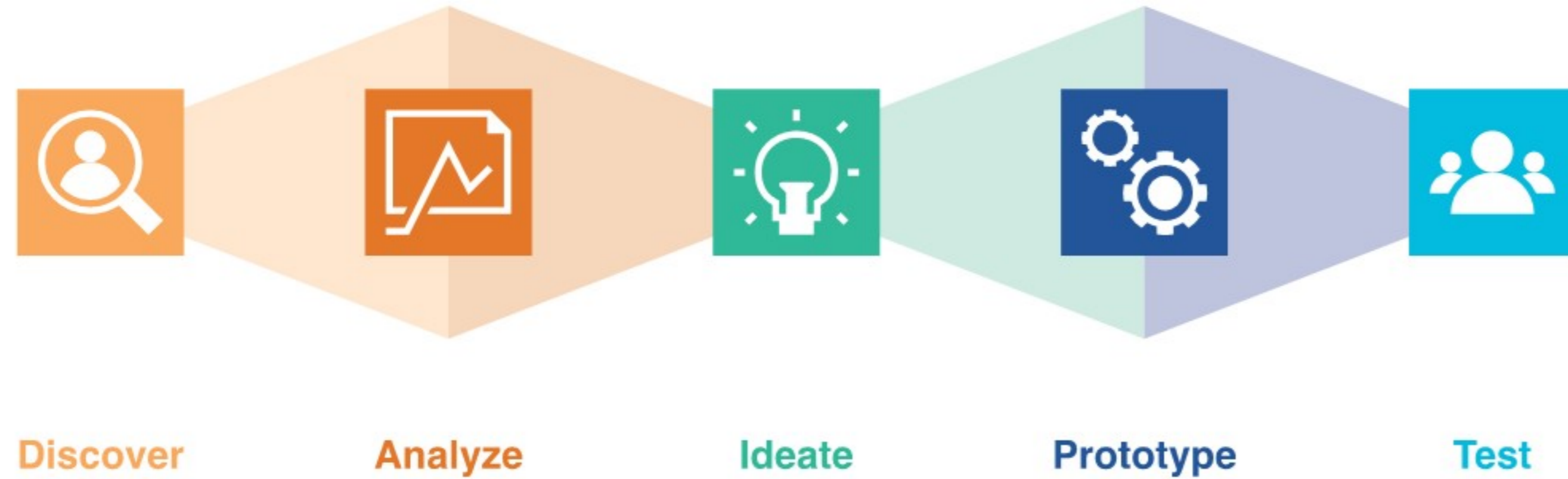
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## Why use design thinking at Key?








- Breaks down complex challenges into simple solutions
- Harnesses creative capacity and secures team success
- Ensures user needs and interests are front and center of planning, design, and implementation
- Reduces risk and costs of solutions





# Design Thinking Tools & Methods

 Discover	 Analyze	 Ideate	 Prototype	 Test
How Might We	Affinity Mapping	6 to 1 Ideation	Concept Poster	Concept Testing
Problem Statement	Empathy Map	100 Uses	Business Model Canvas	Role Play
Contextual Interviews	Journey Map	Yes, And	Buy-a-Feature	SWOT
Current State, Future State	Service Blueprint	Storyboarding	End User Co-Creation	Feedback Matrix
A.E.I.O.U. Observations	Design Principles		Low Fidelity Prototype	
Rose/Bud/Thorn	Personas		High Fidelity Prototype	
Expert Interviews	Knowledge Mapping			
Immersion	Value Web			
	Competitive Analysis			

See all available tools [here](#).

How might we provide a better client experience both in-branch and via drive thru window when a client visits?





## discover

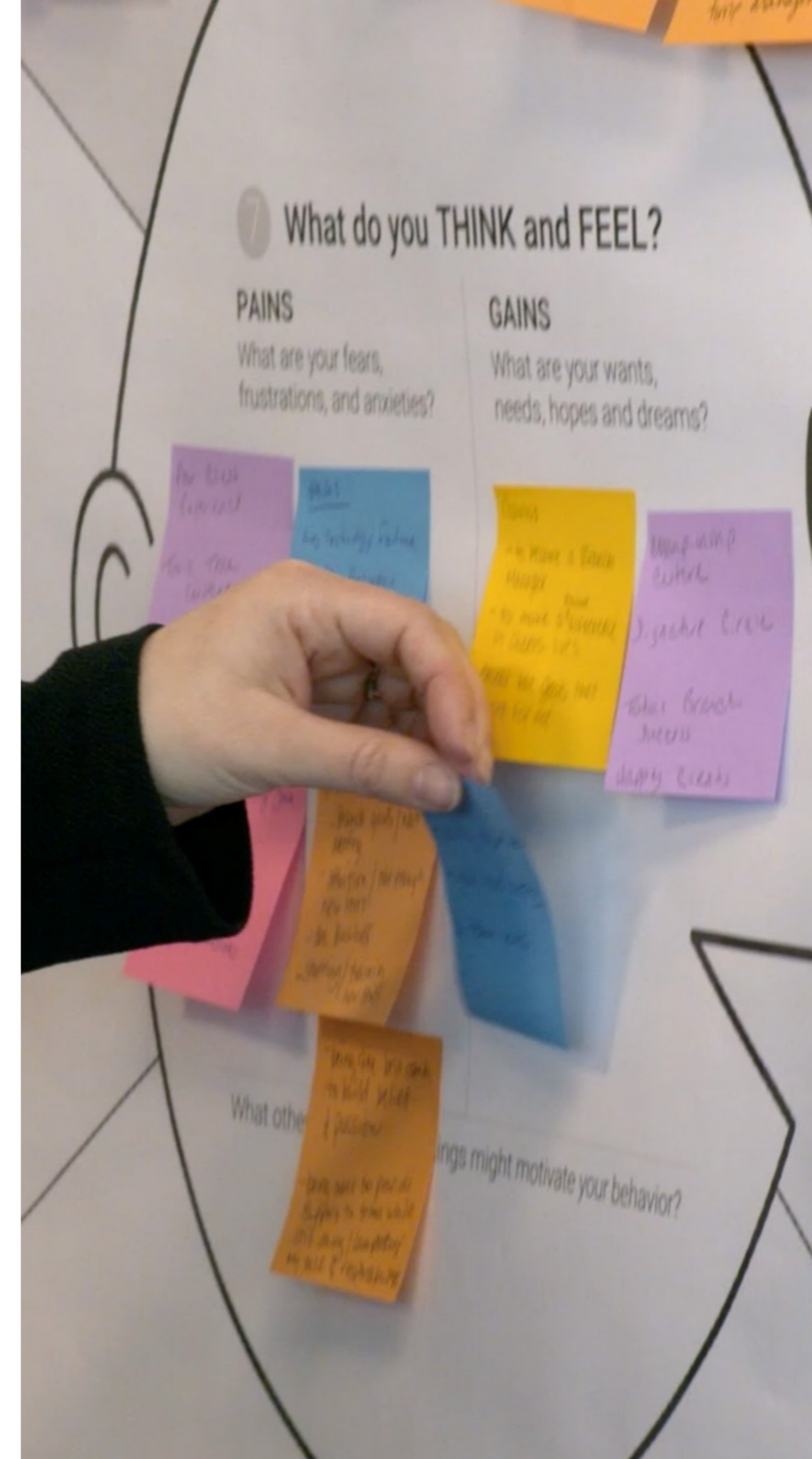
Uncover pain points, identify opportunities, and empathize with end users based on their behaviors, needs, and values.



## Who is our user?

In the Discover stage, your goal is to **discover anything and everything you can about your user**. This is the phase where you get to uncover the **values, behaviors, and needs** of the people you are building your product, service, or process for. The more that you understand your user's values, needs and behaviors, the more you will be able to find high value ways to **deepen your relationships** with them.

At this phase, you need to check your bias at the door. Don't assume your users think the way that you do. Dive in with an **open, curious mind**.



# Framing

Use framing tools at the beginning of an initiative to get teammates on the same page.

- You can revisit and revise this framing as you go but do it intentionally.
- Harness the power of visuals by looking at the same document, worksheet, or whiteboard at the same time.

## How Might We



Used to define a specific opportunity, a "How Might We" statement should align a project team around a shared objective. A well-constructed statement should be concise, clearly identifying a specific action, audience, and quantifiable outcome by which to measure success.

### Example

*How Might We...* enable Laurel Road to facilitate in-person engagements *for...* healthcare professionals *in order to...* increase the number of primary accounts by 10% over the next year.

**How Might We...** (insert action)

**for...** (insert audience)

**in order to...** (insert outcome)

**Build it out**  
- Combine the input from the boxes above to form your statement.



**Design Thinking: discover phase**  
Uncover pain points, identify opportunities, and empathize with end users based on their behaviors, needs, and values.

## Problem Statement



Problem statements create foundational alignment for project teams. The final problem statement should guide all future work, acting as a north star for the team to rely on as they progress through the design thinking process.

### Example

*Audience...* *Current State...* *Cause...* *Impact...*

#### Audience

Whose problem is this?  
- Users  
- Stakeholders  
- Clients

#### Current State

What's happening now?  
- Pain points  
- Gaps  
- Undeserved need

#### Cause

Why is it happening this way?  
- Origin  
- Historical Context  
- Details

#### Impact

What's going on as a result?  
- Pitfalls  
- Shortcomings  
- Detractors

### Build it out

- Combine the input from the boxes above to form one concise statement.



**Design Thinking: discover phase**  
Uncover pain points, identify opportunities, and empathize with end users based on their behaviors, needs, and values.

Need a template to get started?  
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## A.E.I.O.U.

Use observation when you want to see what people are doing in their real-life context without filter or bias.

- Before going into an activity like this, note your personal expectations beforehand so you can leave them at the door.
- Try to blend into the background when you observe— don't let your presence influence the folks you're watching.

## A.E.I.O.U. Observation

Watching how clients act can yield great insights. Observing users this way can provide new info that otherwise may go unnoticed. Sometimes what they think they're doing versus what they are *actually* doing can be totally different.



### Activities

- What are they doing?
- How are they doing it?
- What's their goal?

### Environment

- Where are they?
- Why are they there?
- What are they aware of?

### Interactions

- What delights them?
- What frustrates them?
- What are they unsure of?

### Objects

- What do they see?
- What do they touch?
- What things are present?

### Users

- Who are they?
- Are they part of a group?
- What do they value?



**Design Thinking: discover phase**  
Uncover pain points, identify opportunities, and empathize with end users based on their behaviors, needs, and values.

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# Interviews

Use interviews when you have access to users and need to understand what they're thinking in addition to what they're doing.

- Being in context is ideal, but it's ok to conduct interviews like this out of context.
- See the next slide for interview tips.

## Contextual Interviews

Interviewing users where they live, work, or play puts their behavior in context. The environment informs their interactions and your insights. Talking face-to-face, on location provides the space for spontaneous discoveries.



### Setting of interview

- Location
- Unique attributes

### Interviewee

- Who are they?
- Why were they chosen?
- Identifying characteristics

### Document the interview

- Key takeaways
- Quotes from user
- Follow up questions



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Uncover pain points, identify opportunities, and empathize with end users based on their behaviors, needs, and values.

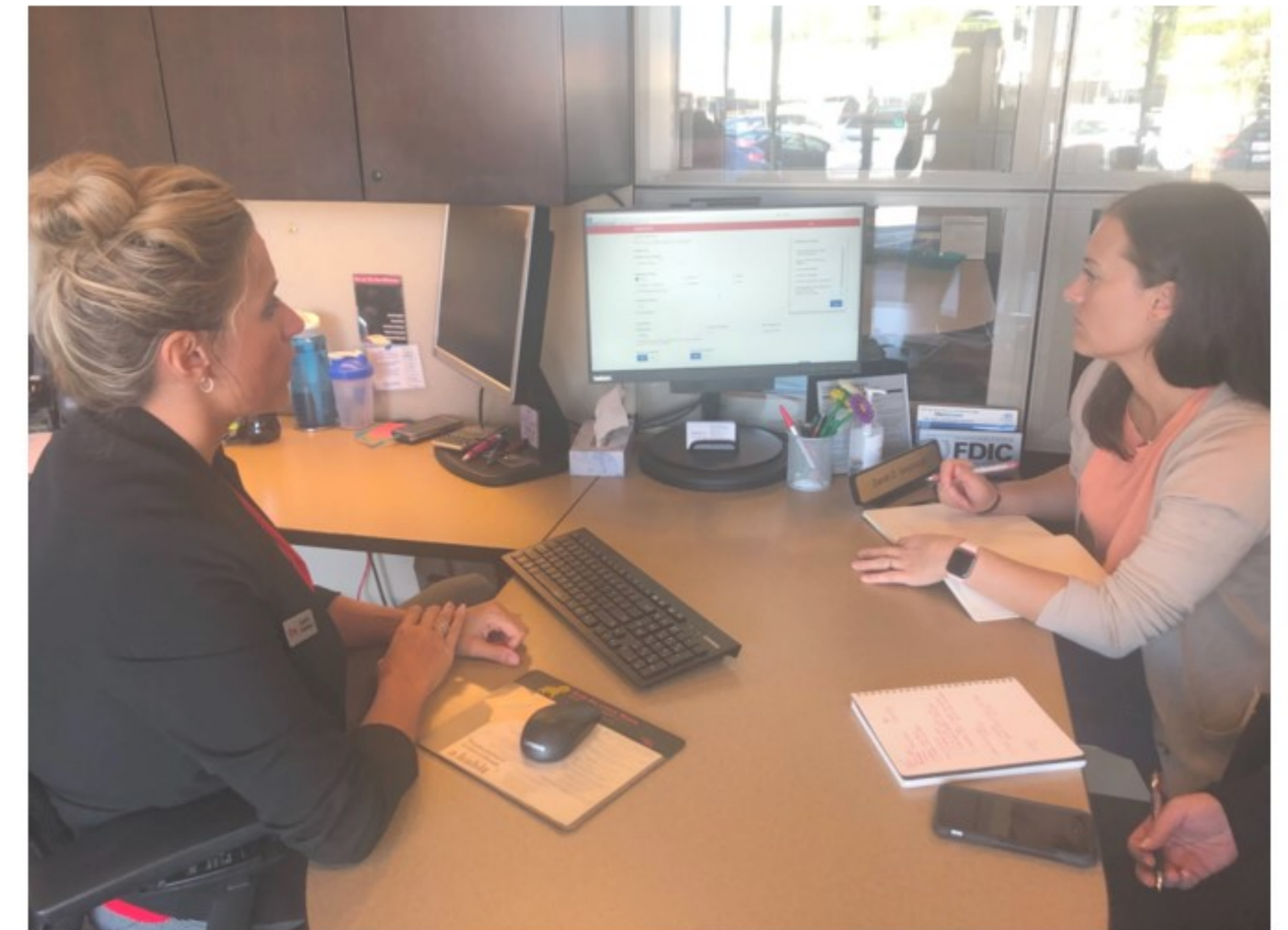
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## Principles for great interviews

1. Identify the right participants.
2. Use your discussion guide and ask open ended questions.
3. Set participants at ease, don't make it too personal.
4. Encourage showing and telling.
5. Listen and stay neutral.
6. Communicate time expectations.
7. Reward and thanks.





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# How might you use Discover tools or methods in your work?

## Using A.E.I.O.U Observation and Contextual interviews of bankers



Discover

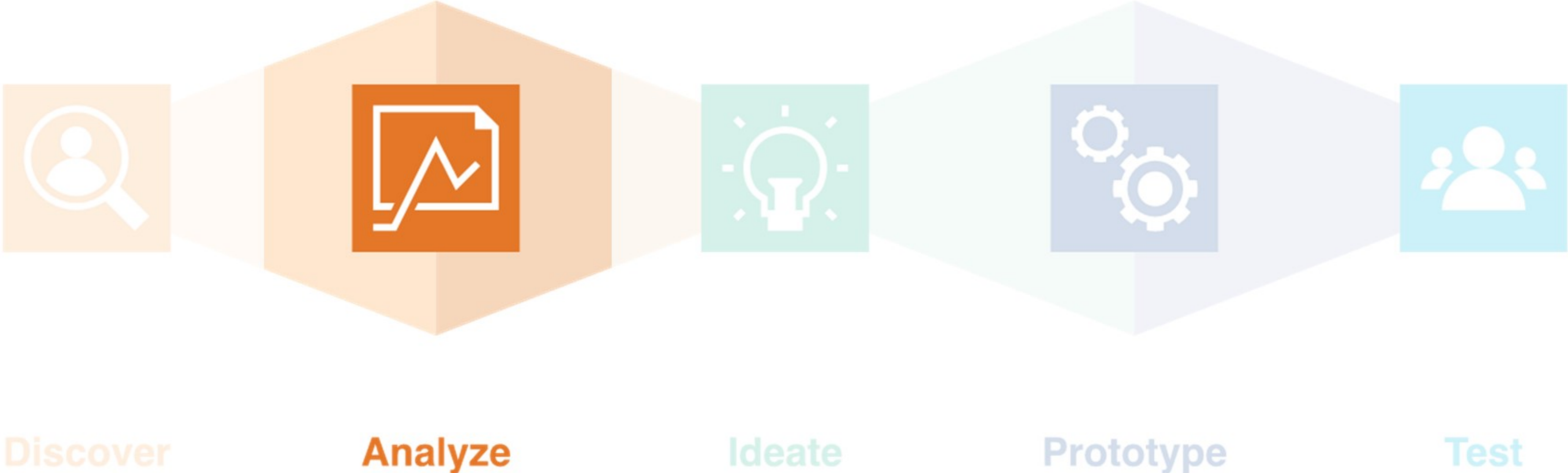
Analyze

Ideate

Prototype

Test

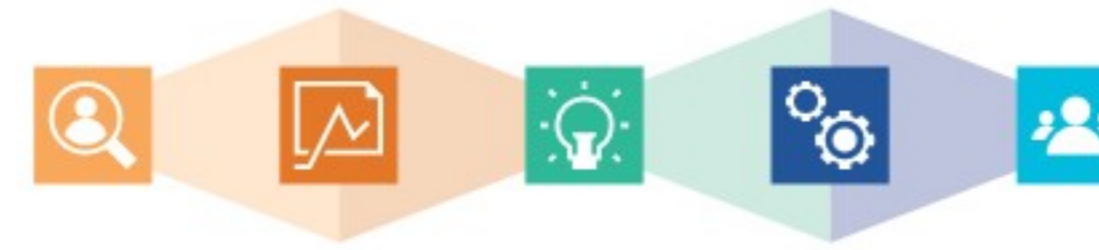
How might we provide a better client experience both in-branch and via drive thru window when a client visits?





## analyze

Synthesize broad learnings into actionable insights, used as springboards for solution-based ideation.



## What problems do our users have?

Now that you have discovered all that you can about your user, in the Analyze phase you **make sense of it all**. Analysis requires the gathered information to be **arranged, rearranged, and connected** so that you can understand and share the **needs, values, and behaviors** of our end users.

In Analyze, you'll recognize the **patterns, trends, and themes** you see across the data. You will look for **'a-ha moments', the peculiar, the outstanding, and the unusual trends** and stories that excite you. This also helps you narrow down your initial "how might we" question into one that is more specific.



# Journey Map

Use a Journey Map when there is a multi-step process or experience you want to understand better.

- Explore various aspects to track in each step, such as user mindset, step complexity, and interactions with others.
- Mark pain points along the journey map to discover areas for improvement.

## Journey Map

A user's journey is made up of steps. Ask yourself what specific actions they take to accomplish their goal(s). Describe each step — big or small — to help discover pain points and unmet needs.



### User

- Who are they?
- Basic demographics
- Identifying characteristics

### Additional info

- Why were they chosen?
- What is their relation to the problem/opportunity statement?

### Step 1

- What is the user doing?

### Step 2

### Step 3

### Step 4

### End Goal

### Mindset of the user

- Circle the icon that best shows how the user feels



### Mindset of the user

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**Design Thinking: discover phase**  
Uncover pain points, identify opportunities, and empathize with end users based on their behaviors, needs, and values.

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# Affinity Mapping

Use affinity mapping when you have a lot of data you need to condense into understandable themes.

- Start with a data dump of every piece of data as an individual item, then cluster similar pieces of data.
- Name the clusters as you go, and if clusters get large see if you can break them into sub-groups.

## Affinity Mapping

Take singular ideas and group them into clusters. Ideas should be clustered based on themes that can be described in a short phrase. What emerges can help inform and steer subsequent phases of work.



### Ideas

- Don't hold back! Generate as many ideas as possible.

### Theme

- Summarize the central idea this group shares.

### Theme

### Theme



**Design Thinking: analyze phase**  
Synthesize broad learnings into actionable insights, used as springboards for solution-based ideation.

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# Design Principles

Use Design Principles when you need to give clear direction for a body of work before the details have been decided.

- Start with writing a set of user needs based on discovery work.
- Include the user need in the principle itself, you can use the format “Do <principle> to help users <need>.”

## Design Principles

Transform key insights from the discover phase into concise, comprehensive principles. Help your teams stay aligned in subsequent design phases by asking, “Does what we are doing align with our design principles?”



### User needs

- What does your user need? List relevant info below.

### Thematic principle

- Address your user needs by making it concise and impactful.

### Analogs

- Inspirational products from dissimilar categories.

### Competitive products

- What's the competition like out there?

### Internal initiatives

- What internal projects should we be aware of?



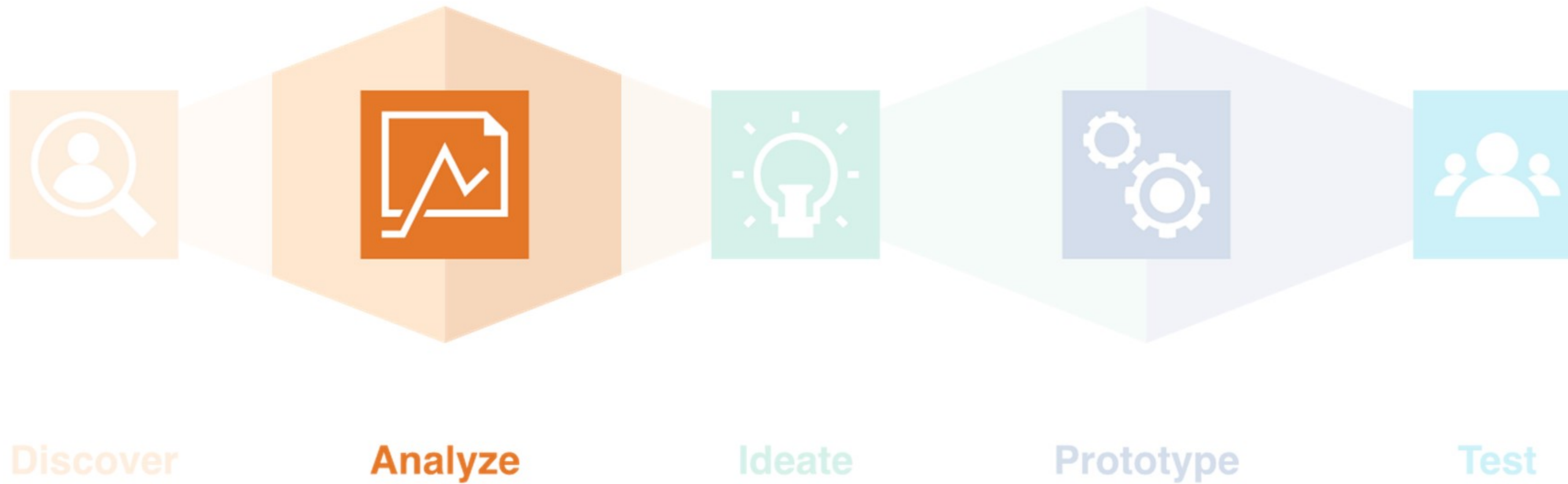
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Synthesize broad learnings into actionable insights, used as springboards for solution-based ideation.

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**How might you use Analyze tools or methods in your work?**  
Write it on a post it along with your name.





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## Next Steps

- 1 Complete discovery at assigned branch**
- 2 Reflect on what you have learned and begin to analyze**
- 3 Show up to our in person workshop ready to share your discovery and analysis.**