

Method Cards

Learn to Work Differently

About these methods

These cards were created as a reference for applying design and innovation skill sets to projects and with teams. Grounded in six core principles of working differently, these methods should help you pursue new approaches, explore opportunities more broadly, and shape ideas quickly.

Enjoy!

Salesforce Ignite

A word on collaboration

Collaboration is at the heart of working differently.

The most powerful and innovative work combines the knowledge, ideas, and hard work of many people—not just one. Collaboration involves engaging with peers, other disciplines, partners, and users as frequently as possible to get work done. Two to three people working together on a topic for an hour is more efficient than an individual trying to figure it out on their own. To collaborate is to frame a topic together, to have ideas together, and to take something apart together. By collaborating, teams go farther, faster.

*“If everyone is moving forward together,
then success takes care of itself.”*

HENRY FORD



Facilitating Reflective Discussion



Working in teams requires facilitating critical discussion frequently among the group. Pose reflective questions; have people share more; and elicit pros, cons, and next steps.

HOW TO

- 1 Start with open questions like, “What was interesting about what we did?” or “Where do you see opportunity? Challenges?”
- 2 Embrace silence. Give time for people to think and start contributing. It will seem like a long, silent pause—but be patient. Someone will fill the void.
- 3 Restate contributions and what you’re hearing. Ask for differing points of view, and encourage people to build on each other’s thoughts.
- 4 Capture ideas, phrases and questions. Draw diagrams of what you’re hearing. This helps people think about the content and contribute more.
- 5 Close with next steps. End the discussion with participants suggesting what to keep in mind as the project moves forward.

TIPS + TRICKS

Make sure other people are speaking more than you.

Don’t allow debate. While asking open-ended questions may feel vague, they lead to important contributions from participants.

TIME

15-20 minutes

TEAM SIZES

4-20 people

MATERIALS

Chisel tip marker, easel pad

A word on collaboration

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Collaborative Cycle



Here's a simple and effective structure to get the most out of an assembled group of people. Use it as the basis for brainstorm and other generative meetings.

HOW TO

- 1 Remove distractions. Encourage attendees to shut computers down and stay engaged in the conversation.
- 2 Set context. Give the group some context on what you want them to do together—brainstorm ideas, review user video, sort information, receive feedback, etc. (5 min)
- 3 Get the content out! Start the exercise and have participants capture their insights on post-its or sketch ideas. One idea at a time. (30 min)
- 4 Step back to organize what was created. Encourage discussion by finding themes and identifying gaps that will move the team forward. (15 min)
- 5 Assign specific people tasks and deadlines to ensure progress. Follow up on their progress. (10 min)

TIPS + TRICKS

Don't let people talk their way through the time or 'nay say' ideas.

Encourage the team to think expansively and save critique for a designated time. Ideas will build off of each other, so slow starts are okay.

TIME

45-60 minutes

TEAM SIZES

5-8 people

MATERIALS

Sharpies, sticky notes, half sheets

The Six Principles to Work Differently



See *and* **Experience**

Develop empathy and understanding to identify the ideal state.

Dimension *and* **Diagram**

Identify and structure information to frame the problem.

Question *and* **Reframe**

Challenge assumptions to open up new possibilities.

Imagine *and* **Model**

Make ideas tangible to share and inspire.

Test *and* **Shape**

Repeatedly learn and refine solutions.

Pitch *and* **Commit**

Communicate and share often to move work forward.

See *and* Experience

Developing empathy and understanding to identify the ideal state.

While you may have worked in the industry for many years or are quite familiar with a particular aspect of everyday life, spending time really looking at and understanding what happens in a given context leads to insight. This is no time for stereotypical descriptions, conventional understanding, or common sense. It's critical you immerse yourself in the world of who you're designing for, see it with fresh eyes, and question why it is the way it is.



See *and* Experience

Develop empathy and understanding to identify the ideal state.

GET STARTED

- 1 Pick a subject; a person or physical space to focus on.
Get specific.
- 2 Generate a short set of questions about what you want to learn.
Our natural inclination is to get super focused. Rewrite your first set of questions a bit broader to expand your scope for more context.
- 3 Keep your questions open-ended. While they might seem vague, open-ended questions lead to important user insight.
- 4 Determine how to capture what you're learning, ideally both visuals and audio. If possible, bring a buddy to help record notes.
- 5 Document your thoughts immediately following your See and Experience session. Reflect and synthesize as you go.

SEE AND EXPERIENCE IN A NUTSHELL



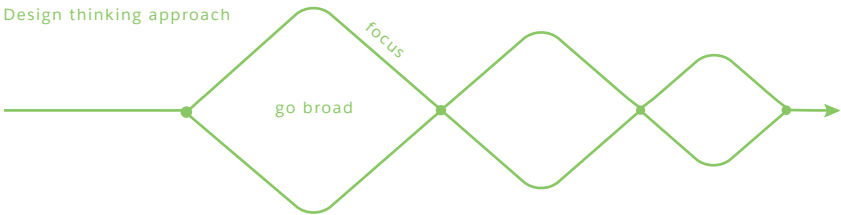
Collect rich data—the why and how of people’s behaviors—to uncover new opportunity grounded in what people value.

Develop deep understanding and empathy for users in order to help you prioritize and navigate opportunities for solutions.

Look for new patterns and what matters most to your users to inform your problem framing.

DAY-TO-DAY PRACTICES

Design thinking approach



When starting a project, list topics you need to learn more about. Clarify learning objectives and create a structure to guide your meeting with users, customers, teams or employees.

In conversation, zoom out a level to understand the broader context.
e.g. listen for users’ needs not opportunities to implement a solution.

To uncover more detail about a situation create stimuli and share with users to facilitate a more nuanced or forward-looking conversation.

Conduct interviews with extreme users.
e.g. early adopters or diehards, for inspiration before solution ideation.

Ask your teammate or user to show you the technical thing they are explaining in words.

Go out and experience competitive products first hand to learn and inspire.

Revisit your users to focus on particular parts of their experience as you approach implementation.

Observation



Given our familiarity with workplaces and the routines of everyday life, we don't see and reflect on what's really going on. Focused observation is a powerful tool.

HOW TO

- 1 Think about and decide what environment or context you'd like to spend time observing.
- 2 Take a notebook, pen, and a simple note taking framework of AEIOU (Activities, Environment, Interactions, Objects, and Users).
- 3 Find a place to sit and observe without being in the way. Don't hide, but don't impede. Let the people know you're there to learn, not to evaluate.
- 4 As you observe the action, note what grabs your attention and what raises questions in your mind.
- 5 Sketch out the environment. Make a list of things for a specific category. Count things. What's interesting?
- 6 Take pictures and record video. Watch the video and pin up pictures. In reviewing, you'll often see things you didn't notice the first time.

TIPS + TRICKS

Be yourself, not a sterile observer. Build rapport with the people. Show interest in what they do and tell them so. Note how they are feeling and what their experiences are like.

PAIRS WELL WITH

- Empathy Mapping
- Ways of Statements

TIME

45-60 minutes

TEAM SIZES

1 or 2 people

MATERIALS

Video camera with good mic, camera phone, consent form

Show and Tell Interview



The best way to get better at learning from users and your colleagues is to have them “show and tell” you about what they do. You listen, capture, and learn.

HOW TO

- 1 Before meeting your participant, prepare by writing down things about their situation, job or life you'd like to see and understand.
- 2 Be transparent with your participant about what you're trying to learn. Emphasize you'd like to know how things really are, not the conventional notion of how we think things should be.
- 3 Start out with a broad background question. “Tell me a little about yourself and how you got here.” Use what the participant says to ask more specific questions. Use “Tell me about...” on every topic.
- 4 Make sure you cover ground and don't get caught on one topic too long.
- 5 Collect things or pictures of things that support the user's experience: references, diagrams, tools, etc.

TIPS + TRICKS

Avoid assumptions.
Have participants explain details in their own words and demonstrate the activity.
Ask open-ended questions that avoid short yes/no or discreet choice answers.

PAIRS WELL WITH

- Empathy Mapping
- Ways of Statements

TIME

45-60 minutes

TEAM SIZES

1 or 2 people

MATERIALS

Video camera with good mic,
camera phone, consent form

Trend Immersion



Trend immersion provides an understanding of what is shaping popular culture so solutions can be relevant, timely and interesting.

HOW TO

- 1 Consider more general trend areas like technology, lifestyle, health, food, etc. and how they affect the topic at hand (*e.g. snack mix*).
- 2 Search the internet for articles and images relating to the relevant trends (*e.g. tech in food delivery, ethnic flavor trends 2015, etc.*).
- 3 Rename and save images in a folder for easy sorting and reference later.
- 4 Use a variety of sources - indie food and lifestyle magazines (Lucky Peach, Cherry Bombe, Gather, Fool), blogs, industry newsletters and publications (QSR, Food Product Design, McCormick Flavor Forecast), Pinterest, Instagram, design websites (Dieline, Oh Beautiful Beer, notcot).
- 5 Also look for trends relating to the areas of the experience canvas (*packaging, flavor, channel, etc.*).
- 6 Brainstorm ways to incorporate trends into your ideas (*e.g. packaging material, form, flavor, channel*).

TIPS + TRICKS

Specify dates (within the past year) using the search tools function to ensure timeliness of information.

Update Pinterest boards and visit blogs regularly to keep track of how trends change and forecast where they might go in the future.

Consider how your own innovation and production cycles fit with trend cycles and plan accordingly.

PAIRS WELL WITH

- Product Immersion

TIME

30-60 minutes

TEAM SIZES

1 person

Dimension *and* Diagram

Identifying and structuring information to frame the problem.

Just as a doctor asks a patient more about the different dimensions of their life to assess their health, so you should identify the different dimensions of your project. These dimensions can be used in simple diagrams with arrows and annotation that will help you visualize your project, its complexities, and how you might solve for them.

Diagramming isn't about drawing well. It's about identifying elements and their relationships and representing them with basic arrangements, shapes, lines, and arrows—then adding information with annotation. Different layers of annotation can be used to address different categories of information.

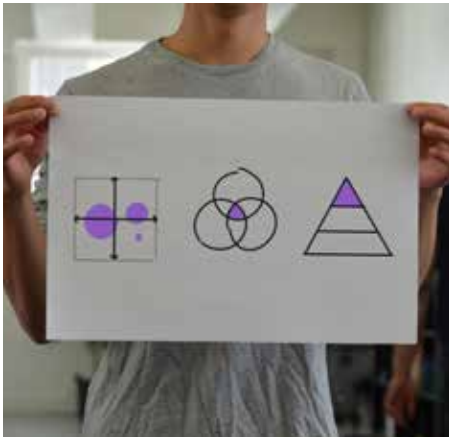
Dimension *and* Diagram

Identify and structure information to frame the problem.

GET STARTED

- 1 Write down everything you know about the problem area on individual sticky notes.
- 2 Look for themes or patterns. Physically reorganize your individual sticky notes based on what's similar (don't worry about 'getting it right'). Label each theme and document with your camera phone.
Adjust grouping to be mutually exclusive and keep each theme at the same level of detail or scope.
- 3 Do it again! Physically reorganize the same sticky notes into new groups to identify additional patterns or themes.
- 4 Create many different simple diagrams that show potential relationships across 1 or 2 themes (and their sub-themes).
Try using different types of diagrams: journey map, 2x2, matrix, venn diagram, onion model...
- 5 Identify the visual diagrams that best frame an opportunity and point towards a "so what" or clear action.

DIMENSION AND DIAGRAM IN A NUTSHELL



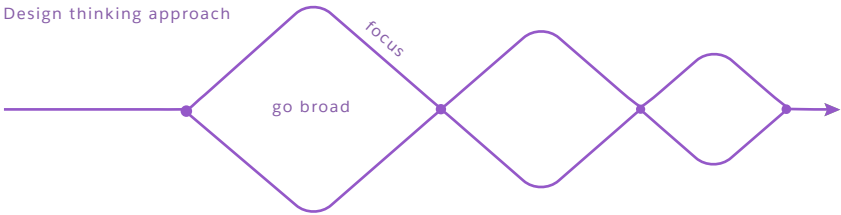
Create simple visuals to express the relationships between the dimensions in order to highlight opportunity.

Create building blocks for assessing and structuring the problem by identifying the different ‘dimensions’—categories of information like values, needs and activities within the problem space.

Select the best structure—the one that best describes the opportunity and points towards clear action—to frame and direct your future work.

DAY-TO-DAY PRACTICES

Design thinking approach



Clarify your existing understanding of the problem space by documenting all that your team knows on sticky notes and organize for themes.

Generate a list of potential hypotheses to inform further inquiry and avoid jumping to a single solution.

Identify specific design elements of existing solutions to inform ideation.

Diagram the specific steps in your user’s current experience to identify potential issues or to communicate the ideal future experience.

Create business models, solution maps, and value webs to help visualize the sources of value and frame the big picture.

Affinity Clustering



Take any large list of ideas or notes and sort them into a smaller number of separate groups. Then name the groups to create an information structure and discover themes.

HOW TO

- 1 Use a brainstorm or other Collaborative Cycle to generate a collection of content, ideas, or issues on individual sticky notes.
- 2 Now sort the items into groups. Take one item and make it the first item in the first group. Take the next item and ask, "Is this similar to the first one or something different?" Either place it in the first group or into its own group.
- 3 Continue item by item, placing things that are similar together and creating new groups when they don't fit.
- 4 After you're done grouping, you should have 5 to 10 groups. Name the groups based on what the items represent together.
- 5 Your named groups can now be used to describe what you have, help generate more items in a group, or help you see gaps you haven't addressed.

TIPS + TRICKS

Move through the grouping quickly—don't overthink it! It's a creative exercise. Group, reflect, and rearrange. Practice makes you better and the results more useful.

PAIRS WELL WITH

- Collaborative Cycle
- Concept Sheets

TIME

20 minutes

TEAM SIZES

3-5 people

MATERIALS

Sharpies, sticky notes

Empathy Mapping



*Empathy for a user's experience is at the heart of creating meaningful solutions.
An empathy map helps your team articulate the user's perspective.*

HOW TO

- 1 On a large easel pad, draw the base empathy map with four quadrants: 1. Say, 2. Do, 3. Think, 4. Feel.
- 2 Notice that “say” and “do” are very explicit and “think” and “feel” are implicit.
- 3 Consider a specific user's experience and populate the map, writing down on sticky notes what the user said, did, felt, or thought.
- 4 Use another color for another user's experience.
- 5 Once populated, step back and reflect on the content. Look for patterns and inconsistencies. What's at the heart of this experience? Write down these observations and insights.

TIPS + TRICKS

Don't fall back on stereotypical descriptions of users' actions or feelings. Use fieldwork and conversations with users to inform your map with real data.

PAIRS WELL WITH

- Ways of Statements
- Show and Tell Interview
- Observation

TIME

45-60 minutes

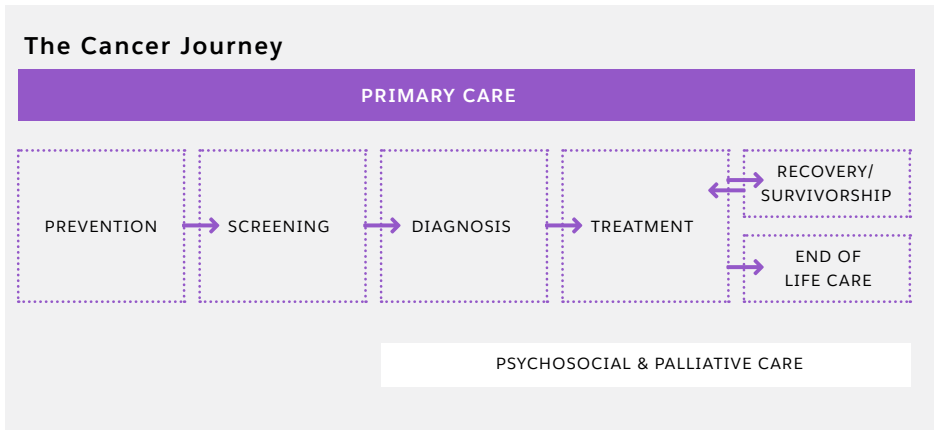
TEAM SIZES

2-5 people

MATERIALS

Easel pad, chisel tip markers,
different colored sticky notes

Journey Mapping



To see if you understand a user's journey, create a diagram representing the distinct activities within their experience. This is a foundation for many useful analyses.

HOW TO

- 1 Decide what part of the user's journey you'll represent. It could be at a high level (a day in their life) or a more detailed activity (taking their meds).
- 2 Draw a labeled shape for each key activity in their experience.
- 3 Arrange them in a sequence or a cycle so you can trace their experience over time.
- 4 Use arrows to show direction, paths, alternatives, etc.
- 5 Use color or size to identify groups or different kinds of activities.
- 6 Once you have a base diagram, you can add more "layers" of information with labels or annotations.
- 7 Consider where trouble happens, where technology may play a role, what might be unnecessary, or where help would be best targeted.

TIPS + TRICKS

Use sticky notes as a way to quickly brainstorm activities and arrange them in ways that are helpful. Have a graphic designer help improve the representation.

PAIRS WELL WITH

- Ways of Statements
- Show and Tell Interview

TIME

45-60 minutes

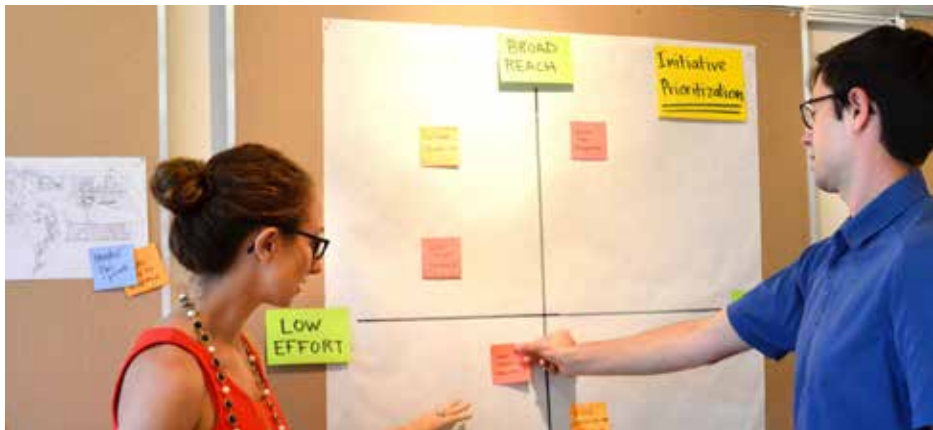
TEAM SIZES

2-3 people

MATERIALS

Sharpies, sticky notes, or diagramming software

2 x 2 Matrix



Find two dimensions and plot elements on a simple chart to show patterns or gaps in the information. Use it to make a case for targeting an area with ideas or to shift strategy.

HOW TO

- 1 Any list of similar elements can be placed on a 2×2: a set of ideas, competitors in a market, or elements of a user experience.
- 2 Try different dimensions to spread the ideas out on the map—things like cost, quality, time, ease of implementation, etc.
- 3 Cross two of the dimensions and plot your elements. If they spread out or form an interesting pattern, you're on to something!
- 4 If they don't spread out, you haven't found a dimension that differentiates the list of elements.
- 5 Play with a few different 2×2s that work.
- 6 Facilitate a reflective discussion about what the pattern might mean for your project. There may be a gap in the chart suggesting an untapped area to target.

TIPS + TRICKS

Try to create a dimension unique to your list of elements rather than typical axes. Simply trying different axes helps develop a better understanding of the list you're dealing with.

PAIRS WELL WITH

- Concept Sheets

TIME

15 minutes

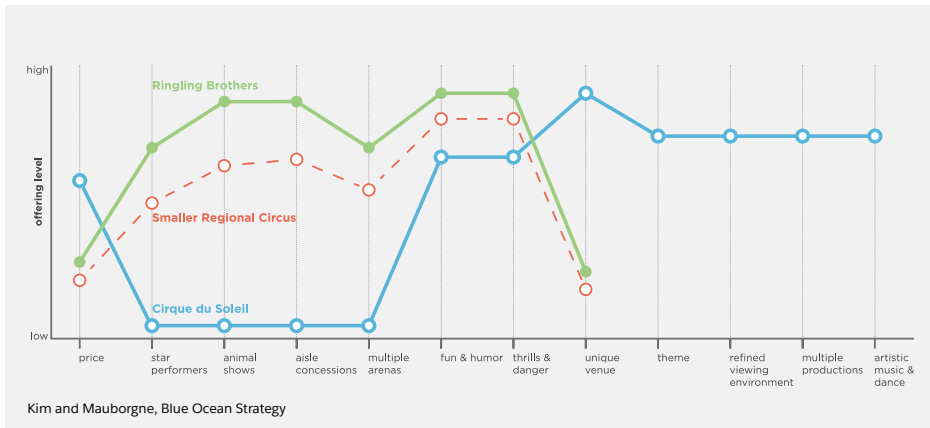
TEAM SIZES

1-5 people

MATERIALS

A large surface to plot out the elements and form groups

Value Curve



Innovators often change a fundamental assumption that defines an industry, product, or service. Play with Value Curves to imagine how you might change things.

HOW TO

- 1 Use sticky notes to brainstorm the fundamental dimensions of your industry's offering.
- 2 Line up the industry dimensions along the bottom of a chart. The vertical axis is "importance or level of offering" and goes from low to high.
- 3 Plot your organization's curve on the dimensions.
- 4 Plot competitors on the dimensions. Look for significant patterns.
- 5 Now, consider radically changing one or more of the dimensions. Try offering way more or less quality in one or more dimensions or eliminating some.
- 6 Consider adding dimensions that customers would value and would differentiate your solution.
- 7 Continue playing with the dimensions to better understand the current industry and possible strategies for improvement.

TIPS + TRICKS

Keep the number of dimensions to between 7 and 10. Use the exercise in a group to question what your industry takes for granted. Gain confidence by seeing examples from other industries.

PAIRS WELL WITH

- Analogous Examples
- Solution Maps
- Service Prototypes

TIME

30-60 minutes

TEAM SIZES

2-5 people

MATERIALS

Easel pad, chisel tip markers, or diagramming software

Problem Statement Matrix

I AM	TRYING TO	BUT	BECAUSE	WHICH MAKES ME FEEL
Atlantic Director	Manage my debt	Budgets have been cut by 50%	don't have a steady source of income	worried about that I might lose my job
Professor	Find stability in my job	Can't get tenure	research funding is tight	concerned about not having anything

Take what you've seen and heard from users to reframe your project challenge in human terms. This helps provide a fresh, user-centric perspective.

HOW TO

- 1 Use the problem statement template. Each team generates problem statements in the users' words, filling in each of the 5 phrases. Do this for multiple users, capturing each phrase on a sticky note and creating a matrix.
- 2 Have the team spend a few minutes looking at the matrix as a whole, jotting down notes to self about things that struck them, surprises, patterns, and themes.
- 3 Share the notes and discuss them as a team. Pay special attention to insights that surface that offer a fresh view into the problem. Sort and organize the notes into groups.
- 4 Your named groups can now be used to describe what you have, help generate more items in a group, or help you see gaps you haven't addressed.

TIPS + TRICKS

Use a different color sticky note for each user. Write in the user's words, not yours. We've even seen interviewers give this to users to fill out (and interview them after to understand why).

PAIRS WELL WITH

- Observation
- Collaborative Cycle
- 3-Part Observation

TIME

30 minutes

TEAM SIZES

2-5 people

MATERIALS

Problem statement template, sticky notes

Product Levers



An exploration of categories and products to better understand product attributes and their benefits and how to use them in different ways.

HOW TO

- 1 Go shopping and buy a bunch of products. Look for competitive products in category but also interesting packaging, flavors, ingredients and messaging out of category.
- 2 Take pictures (sneakily!) in stores of merchandising displays, shelves, and products.
- 3 Also search online for images of products and packaging.
- 4 Sort and cluster products and/or images into categories (e.g. occasion, who it's for, form, flavor) to reveal defining characteristics and features and how they tie to benefits.
- 5 Sort products and/or images along a variety of spectrums to show the scope of product attributes in a tangible way. Examples of spectrums are healthy to indulgent, fun to boring, natural to processed, morning to evening, kid to adult, etc.
- 6 Capture notes on post-its and photograph sorts and spectrums for later reference.
- 7 Look for gaps in the category that might reveal product opportunities.

TIPS + TRICKS

Printed photos work well if you don't have access to the actual products. Use the product you buy; open the package, evaluate the layers to get the full experience.

PAIRS WELL WITH

- Trend Immersion

TIME

30-90 minutes

TEAM SIZES

1-5 people

MATERIALS

Different colors/sizes of sticky notes, pens, camera

Question *and* Reframe

Challenging assumptions to open up new possibilities.

When you're good at your job, people expect you to have all the answers, and we're often rewarded for our knowledge of our industry's conventions. But figuring out new, better ways of doing things requires questioning how things are done today. "Why do I have to go to a counter to rent my car?" "Why can't I subscribe to a cab service?" Questioning the status quo opens up new space for thinking and imagination. Apply this principle in every aspect of your project—when visiting the field, in small conversations, reviews of research, and evaluating ideas. Unlike most questions you get, don't be so quick to answer them. Let the question force exploration and insights.

Question *and* Reframe

Challenge your existing assumptions to open up new possibilities.

GET STARTED

- 1 Create a list of specific assumptions—the things you accept as true—that currently guide your point of view and actions.

Think about standard procedures, comments of “that’s just the way it is...,” trends or issues that are always dismissed.

- 2 Question or challenge assumptions and write them down.

Ask: does it have to be this way? what does this represent? what happens if we don’t change?

- 3 Generate a list of alternative statements that suggest a new possibility.

Try: Instead of X, we now believe Y... Others do it like...

- 4 Step back and reflect on which new statements are most interesting and why. Synthesize what those areas reflect and might entail for your work.

QUESTION AND REFRAME IN A NUTSHELL



Create new value by recognizing old assumptions and challenging the status quo.

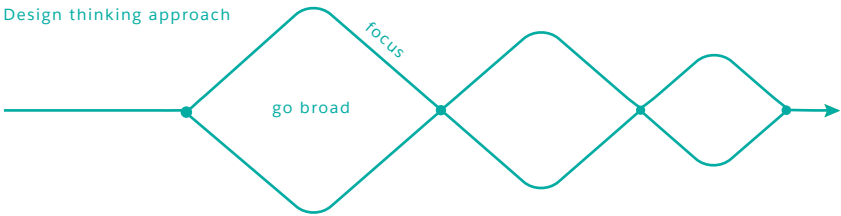
Recognize that individuals and organizations have mental models—a set of assumptions that guide interpretations and actions—which limit the ability to see new opportunity or disruption.

Use a structured approach to surface and challenge your assumptions in order to intentionally change the way you see things.

Synthesize new viewpoints into a 'reframe' statement to socialize new thinking.

DAY-TO-DAY PRACTICES

Design thinking approach



At the start of a workstream, list potential 'orthodoxies'—the generally accepted practices in your organization or how you work today—that might impact your work. Discuss how these may hinder your success and what you can do to challenge them.

During research, ask questions aimed at uncovering common perceptions or beliefs about your topic that users, co-workers or stakeholders have.

Craft a 'reframe' statement to explain the old and new thinking about the problem space to stakeholders and extended team members in order to socialize learning, get feedback and gain buy-in.

Use a 3-part narrative structure to present opportunity areas in a way that connects to real behavior and needs.

- 1. Users do _____ (observation)
- 2. Yet _____ (tension)
- 3. How might we _____ (opportunity area)

Identify out-of-industry solutions or models that are inspiring or interesting. Discuss how they could apply to your current problem to push your thinking and surface perceived constraints.

3-Part Observation



To communicate insights in more evocative ways, wrap your observations about users, situations, or industries in a 3-part structure.

HOW TO

- 1 Start with an observation. This should be something direct—a fact that seems almost obvious.
"People are bored and fidget as they wait in line..."
- 2 Now add an insightful reflection. It could explain the observation, call out an irony, or question why it has to be that way.
"...this is no surprise as there is little in the environment to engage with or warrant attention."
- 3 Third, add considerations or ideas that are ways of overcoming the insight.
"...consider ways of posting or sharing information that would be beneficial for those people to know."

TIPS + TRICKS

The real insight is in how you see everyday situations—not in seeing or discovering truly surprising behaviors.

PAIRS WELL WITH

- Ways of Statements
- Observation
- Concept Sheets

TIME

2-3 minutes each

TEAM SIZES

1-2 people

MATERIALS

Pen, paper, a questioning mind

Ways of Statements



Don't jump to a solution when presented with a problem. Improve your team's ability to explore many varied ideas by writing Ways of Statements.

HOW TO

- 1 After spending time with users and the problem context, you will have identified both challenges and opportunity areas.
- 2 For each challenge, write a Ways of Statement.
"We need ways of reducing wait times for urgent cases."
- 3 Sort the Ways of Statements into groups that might share similar types of solutions.
- 4 A group of similar Ways of Statements might suggest an overall approach to a solution.
- 5 Reflect and discuss which Ways of groupings seem the most promising.
- 6 Seed your brainstorm sessions with these Ways of Statements to generate many possible ideas.

TIPS + TRICKS

Focus on a user-centered mindset—"users need ways of..."
If you find yourself with too many, edit ruthlessly. Just a few Ways of Statements should generate hundreds of ideas.

PAIRS WELL WITH

- Concept Sheets
- Service Prototype
- Collaborative Cycle

TIME

30-120 minutes for multiples

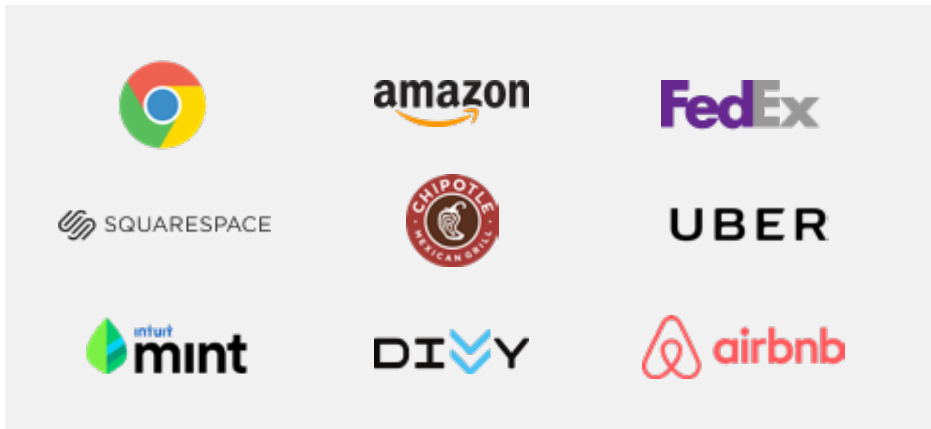
TEAM SIZES

1-2 people

MATERIALS

Sharpies, sticky notes

Analogous Examples



A great way to break conventional thinking is to look at others who've already broken convention. Study how game-changers outside your industry have done it.

HOW TO

- 1 Look for people, products, or services that are new, unique, or extreme in their approach.
- 2 Reflect and identify unique attributes of what they do and any conventions they break.
- 3 Identify some of the obstacles they face and how they overcame them.
- 4 Ask how their specific model or characteristics of what they do might be helpful to your own team's thinking.
- 5 Use a Collaborative Cycle to have small teams research and discuss the analogy and how it might apply.
- 6 Use analogies in pitches to help others see the possibility of defying convention.

TIPS + TRICKS

Try to find examples from related worlds that have structural or characteristic similarities to your own industry or situation. They are often the most powerful.

PAIRS WELL WITH

- Collaborative Cycle
- Elevator Pitch
- Pitch Deck

TIME

5-10 minutes each

TEAM SIZES

1-2 people or a group

MATERIALS

Internet, trend sites, what's new, classic disruptors

Imagine *and* Model

Making ideas tangible to share and inspire.

Michael Polanyi, the Hungarian polymath said, “To have a great idea, you have to have lots of ideas.” The Dyson vacuum was the culmination of more than 4,000 prototypes. As for vacuums, so for innovation! Imagining lots of different ways to address a problem is called “populating the solution space.” No problem or situation has a single solution. Great solutions often have hundreds of new ideas in them. Brainstorming and thinking up ideas any time of the day ultimately helps you create a solution that succeeds. And don't be deceived by verbal descriptions of ideas. Visualize and model them. At first a sketch and then a paper model. Make a prototype to try. At each iteration you'll better understand your idea and get much more meaningful feedback from others.



Imagine *and* Model

Make your ideas tangible to share and inspire.

GET STARTED

- 1 Identify a topic to brainstorm new ideas around.
- 2 Write ideation prompts that point to a specific opportunity area, but allow for different types of solutions.
e.g. how might we empower frontline staff to resolve basic issues?
- 3 Gather pieces of inspiration to stimulate your brainstorming—design attributes, user quotes, other products or services.
- 4 Generate and document lots of ideas (15+)! Visualize each idea, share with others and post where everyone can see.
- 5 Organize and prioritize ideas.
Have individuals vote for their top 3-5 ideas independently before discussing.
- 6 Discuss top ideas, what's most interesting and what you need to learn more about. Agree on next steps to further explore solutions and when to reconvene.

IMAGINE AND MODEL IN A NUTSHELL



Generate a diverse set of potential ideas to select from in order to develop the most valuable and effective solution.

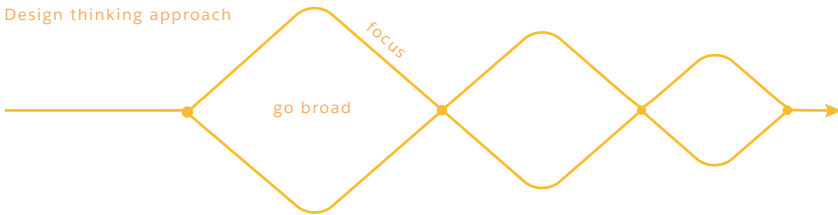
“An idea” is complex. Visualize ideas to push specificity, develop your thinking and recognize value in parts of the solution.

Use novel stimuli and include different perspectives to stimulate new ideas (it’s scientifically proven as necessary).

Use visual models to effectively communicate, facilitate collaboration and inspire others.

DAY-TO-DAY PRACTICES

Design thinking approach



During team goal planning, have each member imagine potential goals to share and prioritize as a team.

As the work begins, have every team member document their existing ideas to help the group move past the first imagined solution.

Build a storyboard of the user experience to illustrate key pain points and use to stimulate brainstorming.

When discussing the solution to pursue, have the team generate and visualize 10+ variations before prioritizing directions.

Prototype prioritized concepts in the lightest way possible—try sketching a marker on paper—to push development and facilitate collaboration with others.

With your prototype, simulate using your solution to surface any overlooked assumptions.

Storyboards



Storyboards are a great way to show existing or future customer experiences. They put problems and solutions in context and make them easier to communicate and assess.

HOW TO

- 1 Select an aspect of a customer experience you'd like to storyboard. Often this is informed by observation or an ethnographic interview.
- 2 Use sticky notes to brainstorm key steps of the customer experience. Draw a simple picture that captures key steps. Stick figures work great!
- 3 Organize the steps into three parts: setting the stage, exposing a problem, and showing its outcome.
- 4 If you have too many, reduce the number of steps to get at the essence of the experience.
- 5 Draft a script taking the viewer through the storyboard. Refine it until it's clear and concise.
- 6 Share the storyboard with others to get feedback. Use it to brainstorm ideas or evaluate a proposed solution.

TIPS + TRICKS

If the storyboard gets too long, break it into smaller sequences. Keep storyboards posted as an easy way to share customer experiences with each other and to foster conversation.

PAIRS WELL WITH

- Show and Tell Interview
- Concept Sheets
- Journey Mapping

TIME

30-60 minutes

TEAM SIZES

2-5 people

MATERIALS

Sharpies, sticky notes,
half sheets

Concept Sheets



Capture ideas with a quick sketch and a provocative title. A concept sheet gets ideas out of your head and into a form that's easy to sort, share, and document.

HOW TO

- 1 Always have concept sheets around your project. Made from a half sheet of letter-sized paper, it should include a place for a title, sketch, name, and date.
- 2 During a brainstorm, get a stack of concept sheets and assemble a team of 5 to 7 people.
- 3 Create a focus for your brainstorm. Ways of Statements are great for this. They require ideas in response!
- 4 Get everyone going. Ask that all ideas be produced on a concept sheet.
- 5 Participants should “sketch out” a concept sheet and then hold it up to share with others.
- 6 Pin the concept sheet up on the wall after sharing.
- 7 After the brainstorm, review the concepts and group them according to similarity, difficulty, value, etc.

TIPS + TRICKS

Concept sheets, as opposed to a personal notebook, allow ideas to be shared with others and talked about. Making concept sheets is habit-forming and improves your visualization and ideation skills.

PAIRS WELL WITH

- Affinity Clustering

TIME

2 minutes each

TEAM SIZES

1 or 5-7 people

MATERIALS

Sharpies, half sheets

Paper Models



Any idea you think has merit should be modeled in a tangible way as soon as possible. Paper models are a surprisingly easy and fast way to make your ideas real.

HOW TO

- 1 Use a core set of basic tools and materials: white paper, white cardboard, white tape, inkjet printer, scissors, and thin and thick markers.
- 2 Think about what demonstration and discussion the model should support. Work at an appropriate size and detail only what's necessary.
- 3 Think through how you could make it before jumping in. Do little experiments to see if the approach would work.
- 4 Try to create the model from as few parts as possible, assembling smaller sections, rather than making a "house of cards."
- 5 For web and app interfaces, use simple symbols to lay out content and details. Switch screens by replacing paper screens in sequence.
- 6 Demonstrate the concept with your paper prototype.

TIPS + TRICKS

Use all white materials. Forgo needless detail. You're not trying to make the real thing out of paper, only represent key aspects. Work quickly, but don't be sloppy. Craft matters a lot.

PAIRS WELL WITH

- Concept Sheets
- User Feedback with Prototypes

TIME

30-120 minutes

TEAM SIZES

1-2 people

MATERIALS

Paper, cardboard

Service Prototypes



Service prototypes make the touchpoints of a new service offering tangible and allow you to test it with customers and other stakeholders.

HOW TO

- 1 Services are not intangible! We all interact with the touchpoints of a service: a website, a phone tree, a mobile app, a brochure, a place, etc.
- 2 To prototype a service, identify the ways users would discover, understand, and engage with it.
- 3 Make these different touchpoints using your paper prototyping skills. Web and app interfaces can easily be sketched.
- 4 If your service involves a place, arrange a room with tables, chairs, and paper signs to model that environment.
- 5 Demonstrate the service to colleagues, or better yet, have an outsider try to use an aspect of the service with your prototype.
- 6 Refine the prototype based on user feedback and try different versions to see how people react.

TIPS + TRICKS

Prototype one aspect of the service rather than the whole thing. Maybe it's just the sign-up process or another key part of the experience.

PAIRS WELL WITH

- Paper Models
- User Feedback and Prototypes
- Analogous Examples

TIME

90-120 minutes for multiples

TEAM SIZES

2-3 people

MATERIALS

Paper, cardboard, furniture, easel pad, sticky notes

Packaging Prototyping



Use a variety of materials (paper, plastic, styrofoam, etc.) to create packaging solutions. With packaging prototyping, you are developing ideas for functional package structures that offer multiple benefits to the user and/or the retailer or distributor.

HOW TO

- 1 Start with some hypotheses, ideas and sketches of your package based on user needs and pain points.
- 2 Pinpoint how your prototypes will answer the questions or hypotheses you are seeking to answer (e.g. dispensing, ripping open, re-sealing, etc.).
- 3 Experiment with different types of materials (e.g. different paper thicknesses or plastic types) to prototype certain parts of or your package, or if it makes sense, the entire package structure.
- 4 Create a few prototypes that can be used to spark future conversation, and don't worry about perfecting or refining the package too much.

TIPS + TRICKS

Hack existing packaging to make the prototyping process more efficient, and use found and familiar objects as a starting-off point for your prototypes. Look at packaging in other categories for inspiration.

PAIRS WELL WITH

- Storyboarding
- Concept Sheets

TIME

60-90 minutes

TEAM SIZES

1-3 people

MATERIALS

Paper, plastic styrofoam, etc.

Test *and* Shape

Continuously learn to improve and refine your solutions.

GET STARTED

- 1 Select a piece of work or prototype you'd like to improve and learn more about. It could be anything; a concept, presentation story flow, user research plan, marketing poster.
- 2 List what you want to learn in your test. Get hyper focused, dissect large concepts into specific testable elements and pin point 2 or 3 acute points to explore. Trying to cram too much into a single test will slow you down and result in low quality feedback. It's much faster, easier and fun to do multiple small tests than try to cover everything at once.
- 3 Prepare a 1 min introduction for your prototype and a short set of open-ended questions.
- 4 Listen. Ask probing questions to dig deeper and uncover what lies beneath each comment.
When someone ask questions such as "How does this work?" respond "How would you want this to work?" Continue to ask "why" up to 5 times to uncover deep seated insights.
- 5 List the top 3-6 takeaways from the interview and the corresponding implications for further development of the prototype.
- 6 Iterate! Continue to shape your prototype by repeating this process many times.

TEST AND SHAPE IN A NUTSHELL



Gather qualitative user feedback to uncover how to better meet the needs of your user and minimize barriers to adoption.

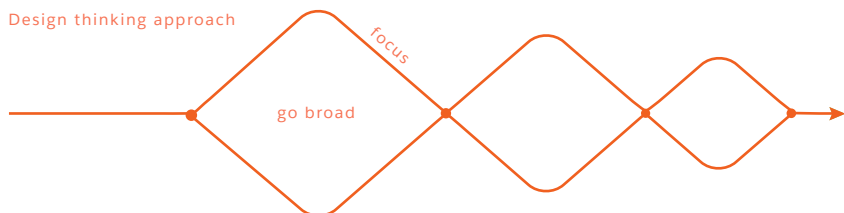
Put ideas that are in-development in front of people as early and as often as possible to learn, test assumptions, surface unknowns and unforeseen opportunity.

Make each test very specific and as lightweight as possible to move forward quickly and efficiently.

Incorporate feedback and insights from tests quickly and iteratively to shape the work for greater value.

DAY-TO-DAY PRACTICES

Design thinking approach



To kickoff, draft 2-3 different problem statements and test out with your team, customers and peers to understand reactions, emerging questions and what is or isn't resonating.

Bring 2-3 low-fidelity prototypes to initial user research and use feedback to inform later ideation.

e.g. interfaces, packaging, experience storyboards.

To gather feedback about your story or business case, create a rough draft of a presentation using only 1 sentence or headline per slide and pitch to a small group. Repeat.

When debating an idea with peers—whether a feature, function or entire solution—pause and quickly prototype the key elements and show to someone else or simulate. Use what you learn to inform decision and next steps.

Use a prototype to simulate implementation steps to understand what communication or processes may be needed to support adoption.

User Feedback with Prototypes



Put paper, service, and interactive prototypes in front of customers and other stakeholders to get their reaction to your solution concept.

HOW TO

- 1 When you have a prototype of a concept, even if it's just paper, have someone else try it.
- 2 Recruit a participant, provide them with context for the idea, and ask them for their honest opinion.
- 3 Ask them to do something specific with the prototype—give them a task it supports.
- 4 As they try, have them talk out loud about what they are thinking, looking for, and trying to do.
- 5 Be helpful, but don't lead them in a direction you want to see. Observe how your prototype does or doesn't support your intended user tasks or experience.
- 6 When they stumble or can't move on, ask them what they are trying to do and what would be helpful.
- 7 After they've tried the prototype, talk more about what you're trying to do and solicit their advice.

TIPS + TRICKS

Design your prototypes to support user activity. It's okay for them to be simple and low fidelity—they should work like good props.

PAIRS WELL WITH

- Paper Models
- Observation
- Service Prototypes

TIME

30-120 minutes for multiples

TEAM SIZES

1-2 people

MATERIALS

Paper, prototypes, service prototypes, cardboard models

Rapid Experiments



Early and often, try out ideas in the real world in simple ways to learn from your users. You're not validating, but rather, testing and shaping your ideas quickly.

HOW TO

- 1 First, articulate your insights, vision and idea on paper.
- 2 Identify the riskiest assumptions in them and brainstorm a list of potential solutions to those assumptions.
- 3 Brainstorm experiments that can be run quickly (starting today or tomorrow). Narrow down to one or two and describe what you're trying to learn.
- 4 Perform the experiment in the real world. Bring in multiple users to get feedback.
- 5 What did you learn about your hypotheses? Based on what you learned, what would you keep the same and what would you do differently?
- 6 Modify or completely change the experiment and try again to keep learning.

TIPS + TRICKS

Be scrappy and use what you have on hand. That includes the materials, locations, and potential users you already know.

PAIRS WELL WITH

- Paper Models
- Service Prototypes

TIME

60-90 minutes, multiple rounds

TEAM SIZES

2-4 people

MATERIALS

Paper and service prototypes, cardboard models

Business Model Canvas

The Business Model Canvas

Designed for:

Designed by:

Who:



The BMC is a set of key dimensions used by startups to track the definition of their offering. The canvas is updated regularly after running tests with customers.

HOW TO

- 1 Print a blank BMC template.
- 2 Use sticky notes to brainstorm five or more possible elements for each area of the canvas.
- 3 Step back with your team and discuss the most important elements. Debate which ones should be kept or eliminated and why. Note what you haven't thought much about.
- 4 Use this discussion to determine the next actions your team will take to test hypotheses or get other feedback from customers.
- 5 After completing each experiment or activity, update the BMC with what you've learned and determine your next experiment.
- 6 Share your business model canvas with leadership and ask for their advice and suggestions.

TIPS + TRICKS

Don't have too many elements in each area. Treat the BMC as a live document, using it to assess where you're at and drive experimentation.

PAIRS WELL WITH

- Solution Maps
- User Feedback with Prototypes
- Pitch Deck

TIME

30-90 minutes for first version
30 minute revisions

TEAM SIZES

1-2 people

MATERIALS

BMC template, sticky notes, pens

Lo-fi Digital Stimuli



Thinking that a mobile app might be part of your concept? Does your solution involve a website or a kiosk? Use lo-fi digital prototyping to get your ideas out and start making decisions immediately. By making it interactive, you can test it out with stakeholders or potential customers.

HOW TO

- 1 Begin by thinking about a primary use case.
What would you like your user to do? Map out each step and decision they need to make using stickies.
- 2 Group the stickies into steps– does it make sense to select color and size at the same time? But shipping and payment should come later.
- 3 Start sketching each step in the process on a template (you can find one here– <http://bit.ly/1QpC3iq>). Draw lines to divide the space, boxes for buttons and images, and add color to draw the user's eye. Each member of the team can choose a step to draw, but look over each other's shoulder to make sure you are consistent.
- 4 Download “Marvel Prototyping” or “Prototyping on Paper” from the Google Play or Apple App Store on your smartphone or tablet. This app allows you to take photos of your interface and string them together to make them interactive. It'll guide you through simple process to set up your new app.

TIPS + TRICKS

Find the essence of the tool and sketch that. Take inspiration from your favorite apps and websites. Search for the interaction you are looking for and try to sketch it out.

PAIRS WELL WITH

- Packaging Prototyping
- Storyboarding
- Concept Sheets

TIME

60-90 minutes

TEAM SIZES

1-4 people

MATERIALS

Sharpies and pens, smartphone or tablet, interface sketch template

Pitch *and* Commit

Communicating and sharing often to move work forward.

Prepare a short, but compelling case for your project to keep others informed and solicit input. These pitches should be well rounded and not just a description of the solution. Think about including the user need, the insight and proposed solution direction, summary of work to date, the real challenges you face, the investments necessary and its ultimate value should you be successful. Pitches are important for securing support, partnerships and commitment along the way. Demonstrate your commitment to the project by being both an advocate of it as well as a good listener to those who help shape it. Make small progress and share it. People who see the idea moving forward will gain respect for it and interact in its success.

Pitch *and* Commit

Communicate and share often to move your work forward.

GET STARTED

- 1 Identify a set of people you think might be able to offer helpful feedback about your idea, prototype, or story.
- 2 Prioritize what information might be important to the receiver and what you really want them to know.
- 3 Get clear on your purpose—why your solution is important—and use that information to frame your story and pitch.

Make it emotionally appealing by connecting to people, larger organizational missions, etc.

- 4 Position how your work supports the purpose in 1 or 2 ways.
- 5 Succinctly explain the key points you prioritized and wrap-up with a call to action.

Whenever possible offer a point of view and position information in a way that invites conversation.

- 6 Pitch and collect feedback from your audience and refine your story for your next pitch.

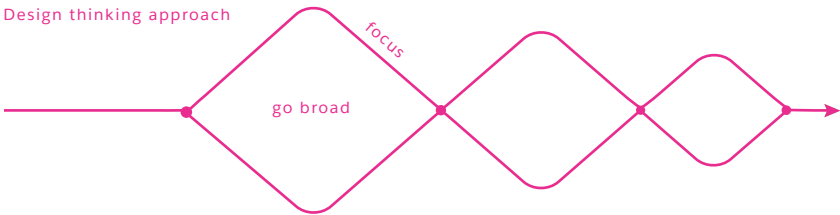
PITCH AND COMMIT IN A NUTSHELL



- Lead with the purpose, or “why” behind the work and incorporate the voice of real users to connect others to your efforts.
- Socialize your work throughout development. Innovation is a social process that depends on continuous, compelling, tailored communication about the work.
- Don’t argue or sell your idea. Craft communication to engage others in your work to shape it, change it and evolve your point of view based on their input.

DAY-TO-DAY PRACTICES

Design thinking approach



- When starting a new workstream, pitch out early hypotheses about the problem space and learning objectives to facilitate collaboration.
- Make time to pitch at every milestone meeting to report on learnings and new opportunities, but don’t sell or give linear updates.
- Use a narrative structure (observation, insight, opportunity) when presenting learning from discovery oriented activities.
- Physically post in-progress work and communication in visible places and get quick feedback from people who pause and express interest.
- During meetings have people stand up and “pitch” their update without slides, communicating the why, what, and how for their ideas.
- Craft presentations collaboratively by sharing early in rough slide form—headlines only—for feedback and refinement.

Solution Maps



Innovative solutions are more than a single idea. A solution map lays out all the key elements and characteristics of an offering that work together to implement a focused strategy.

HOW TO

- 1 Work out the first versions on a large easel pad with a chisel tip marker. Title the page with your solution concept.
- 2 Brainstorm elements of your solution on individual sticky notes. Title them clearly.
- 3 Reflect and choose the smaller ideas that are components or characteristics of the bigger key elements.
- 4 Draw lines between ideas and elements that support or reinforce each other.
- 5 If you're fairly early in the project, use the map to stimulate additional ideas that would support the solution.
- 6 Reorganize as circles and lines on another page to make the overall map clearer.
- 7 Take time to share the map to get feedback.

TIPS + TRICKS

Focus on the core elements that define and enable your solution. Aim to have only 3-5 lead strategic components. Clarify the components by refining language and trying to be as specific as possible.

PAIRS WELL WITH

- Concept Sheets
- Pitch Deck

TIME

30-120 minutes for multiples

TEAM SIZES

1-2 people

MATERIALS

Chisel tip marker, easel pad

Elevator Pitch



To build awareness for an initiative and find potential supporters, create a verbal summary you can share in under a minute. This conveys the essence of your idea.

HOW TO

- 1 The best pitches are simple, clear, and compelling. You'll need to brainstorm, edit, and refine to get there!
- 2 Craft an opening statement. What is the one thing your audience should remember about your initiative?
- 3 Provide context. What's the problem or situation you're addressing? Why isn't that acceptable?
- 4 Describe the core solution. Share what's unique and valuable about what you're doing.
- 5 Describe your ultimate goal. What will be made possible if you're successful?
- 6 If you're asking for something, state it simply and specifically.
- 7 If your audience isn't able to help, ask them for a reference to someone they feel would be more appropriate.

TIPS + TRICKS

Say less in order to draw interest from your audience. Don't underestimate the power of ruthless editing. Make sure your whole team can share the elevator pitch.

PAIRS WELL WITH

- Solution Maps
- Pitch Deck
- Paper Models

TIME

60 minutes for first version

TEAM SIZES

1-2 people

MATERIALS

Chisel tip marker, easel pad, text editor

Pitch Deck



Once your project outgrows its incubation, use a well structured 10-slide pitch deck to explain your concept, build support, and garner additional resources.

HOW TO

- 1 The Pitch:** What's the essence of your solution?
e.g. "Airbnb for ambulatory care."
- 2 The Problem:** Describe the failures of the current situation and the opportunity for your solution.
- 3 The Solution:** Illustrate how you'll solve the problem.
- 4 The Value:** Show how many people could and would take advantage of your solution.
- 5 The Business Model:** Outline the significant value your solution offers the organization.
- 6 The Key Elements:** Explain the dimensions of your solution: technology, organizational change, etc.
- 7 Marketing:** Explain how you'll get the word out.
- 8 Resources:** Show what's needed for implementation.
- 9 Milestones:** Walk through your roadmap and timeline for implementation.

TIPS + TRICKS

Get at the essence in every slide. Too much explanation devalues your solution.

Test your pitch many times before going in for the big meeting. Look for experienced managers to provide feedback.

PAIRS WELL WITH

- *Solution Maps*
- *Elevator Pitch*
- *Business Model Canvas*

TIME

30 minutes

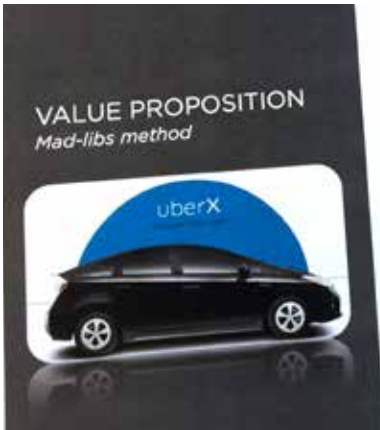
TEAM SIZES

Good for a group

MATERIALS

Markers and pens

Value Proposition



For every commuter who have a need to
be picked up quick is a mobile service
that connects you to your driver
Unlike taxi's, our product
fast, cashless, cleaner.

A value proposition is a clear and succinct statement of the value your offer provides to consumers/users. A Mad Libs methodology is a fast and fun way to create value propositions and test them with different audiences.

HOW TO

- 1 Using the Mad Libs template, start by identifying the target consumer/user and the particular need your offer satisfies.
- 2 Briefly describe the type of offer and its primary benefit.
- 3 Give specific examples of ways your offer is unique compared to competitor's offers or alternatives.
- 4 Develop multiple versions with a focus on one key value for each.
- 5 Value props are easy to create so continually and iteratively test them with your consumer/user, partners and investors to get the tightest, most compelling version.
- 6 Try testing your value proposition separate from its embodiment to understand if it can stand on its own.

TIPS + TRICKS

To help define how your product is truly unique, try developing value propositions for competitor's products. Test extremely different versions with your target user or consumer to find what resonates.

PAIRS WELL WITH

- Storyboarding

TIME

60 minutes

TEAM SIZES

1-3 people

MATERIALS

Mad libs template

Bottom Up Financial Estimate



A bottom up revenue model uses item-level estimates to understand how much money a product or business will make. Use it to determine revenue and make decisions about product costs. Think about your expected sales, how often people will purchase and for how much you will be able to sell the product.

HOW TO

- 1 Set the price you will charge. Consider what people are willing to pay, competition and what you need to cover costs.
- 2 Estimate frequency of use. How many units of product you can sell in a given week? This unit number is called velocity. Annualize by multiplying your weekly velocity by 52 weeks.
- 3 Determine locations/channels. Consider where to sell the product and research outlet or store counts.
- 4 Think about growth and distribution. How many stores/ outlets will you use?
- 5 Assuming 1 product, at 1 location; use the following equation. Revenue = price x velocity (usw x 52) x channel count x distribution.
- 6 Repeat for multiple items and channels.
- 7 Do a gut check. If your revenue seems extremely high, check your frequency. Compare your assumptions against benchmark items where you can find information.

TIPS + TRICKS

Err on the side of conservative instead of liberal in your assumptions.

Consider how different channels may affect your price point.

Compare results against another approach, like top down to ensure assumptions are reasonable.

PAIRS WELL WITH

- Top Down Financial Estimate
-

TIME

45-60 minutes

TEAM SIZES

1-2 people

MATERIALS

Pen and paper, calculator, excel spreadsheet
industry-related information

Top Down Financial Estimate



Top Down revenue model uses assumptions about the general market to understand how much money a product or business could make. This approach is also a way to determine whether there is a big enough market for a given product. It requires making educated assumptions about the business and the market potential for the product.

HOW TO

- 1 Set a price. Consider what people are willing to pay, competition and what you need to cover costs.
- 2 Think about frequency of use. How many times will customers purchase the product?
- 3 Understand the total market. Use secondary research to determine how many potential customers exist in your chosen market. *eg. All cat owners 20-30 yrs old.* This is called the addressable market.
- 4 Determine your actual customers. Out of the entire target population, how many are likely to become actual customers of your product? What percentage of the total customer population do these people represent? This percentage is known as penetration.
- 5 Take all the inputs and multiple together. Price x frequency (per year) x total addressable market x % penetration = estimated revenue.
- 6 Do a gut check. If your revenue seems extremely high, check your penetration. If you number of customers seem high reduce and start over.

TIPS + TRICKS

Use benchmarks from comparable products or industries to keep assumptions reasonable. .3% penetration is a common benchmark for new product introductions. Compare results against another approach, like bottoms up to ensure assumptions are reasonable.

PAIRS WELL WITH

- Bottom Down Financial Estimate

TIME

45-60 minutes

TEAM SIZES

1-2 people

MATERIALS

Pen and paper, calculator, excel spreadsheet, industry-related information

Role playing



Acting out how one or more interactions or ideas would work can often reveal insights into processes and experiences that would otherwise go unrecognized.

HOW TO

- 1 Make a list of interactions/ideas that you want to explore to better understand an experience.
- 2 Create key props that support your enactment.
- 3 Determine how to perform the enactment as a scene. Identify roles and script key behaviors. Have the team act out the interactions/ideas as practice.
- 4 Videotape the enactment, ideally in one take so you don't have to edit. Keep it to 2–3 minutes.
- 5 Review the enactment as a team. What feelings did the different roles experience? What was surprising?
- 6 Capture implications in terms of how that would shape a future iteration of these ideas.
- 7 Show the video to others to get feedback on the ideas. assumptions against benchmark items where you can find information.

TIPS + TRICKS

Don't get too dramatic, you're trying to empathize with the experience of someone else. Focus on what you learned or thought about differently because of the experience.

PAIRS WELL WITH

- Storyboards
- Paper Models
- Service Prototypes

TIME

30 minutes

TEAM SIZES

2-5 people

MATERIALS

Props, video cameras