THE SOCIAL DESIGN WORKFLOW
DESIGNING COLLABORATIVELY WITH STAKEHOLDERS

PHASE 1 | IDENTIFICATION

Step 1 | Identify the Problem

Loosely identify the problem you are trying to address. This will give your project direction, but it is important not to be overly rigid. The more you discover, the more your problem definition is likely to shift.

Try to figure out who has a need, what that need is, and why you should solve it.

Step 2 | Identify the Constraints

Design constraints are limitations imposed upon possible design solutions. These include limitations that are out of your control (such as those imposed by stakeholders, clients, or external regulations) as well as ones that are self-imposed as a way to improve design. Placing the project within such constraints will help you define the scope of what is plausible.

Constraints may be imposed upon any part of the system. A straightforward approach to identifying design constraints is to categorize the type of constraints (e.g., hardware, software, procedural) and then identify the specific constraints for each category.

Step 3 | Identify the Stakeholders

Identify the stakeholders affected by the project. This is not limited to "end users," but might also include any number of community leaders, suppliers, manufacturers, transportation specialists, etc. Knowing who is affected by problems will help you pinpoint who to work with to find possible solutions.
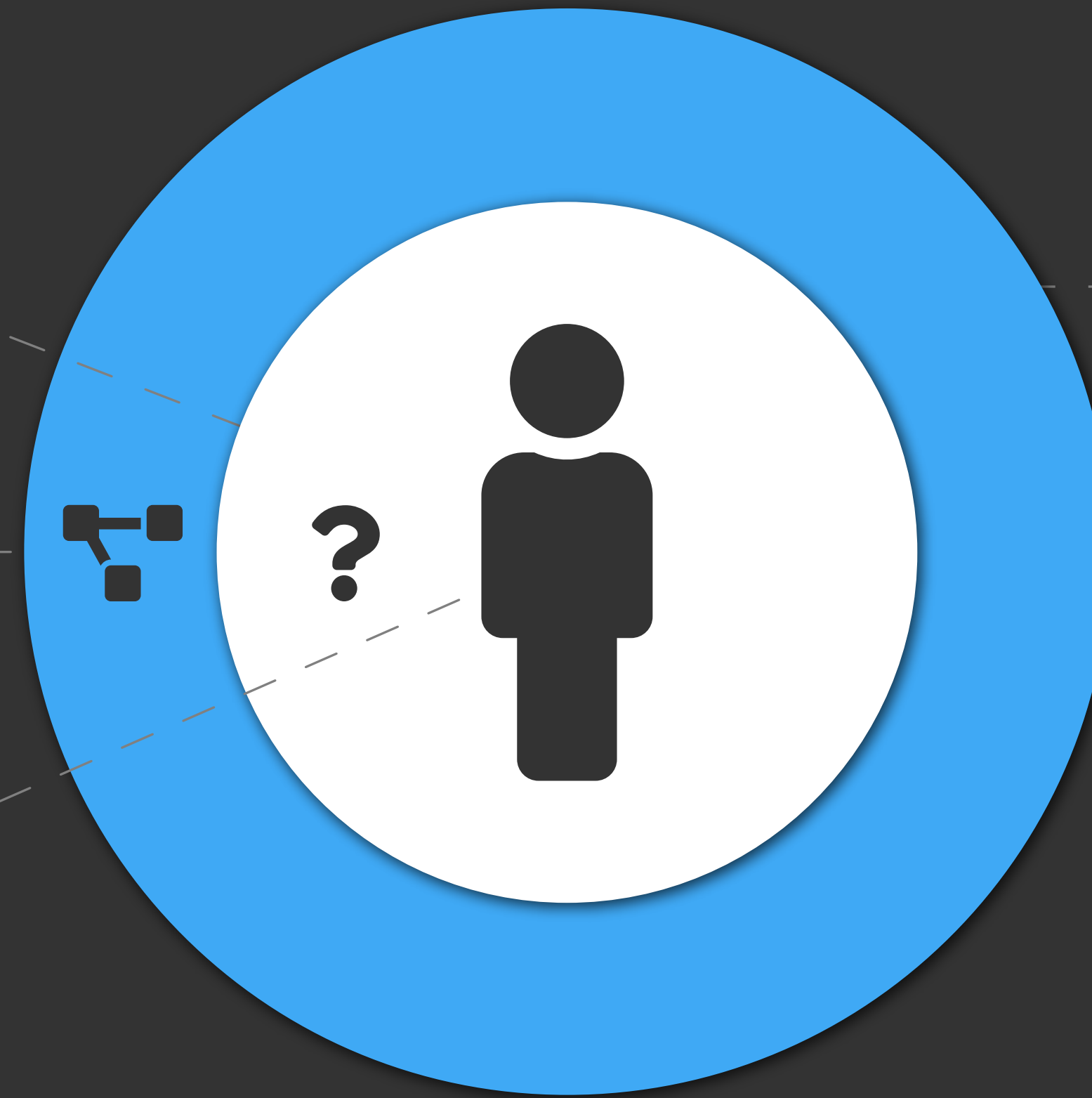
Wicked Problems

Horst Rittel defined wicked problems as a "class of social system problems which are ill-formulated, where the information is confusing, where there are many clients and decision makers with conflicting values, and where the ramifications in the whole system are thoroughly confusing."

When you begin to work with stakeholders, you might find that they have preconceptions about the problems they are facing and what the solutions to these problems should be. Do your best to note these preconceptions and then put them out of your mind entirely.

It will often be the case that stakeholders understand only part of the problem as it relates to them and are disregarding other aspects. You do not want these preconceptions to sway your understandings. Instead of talking to stakeholders in terms of solutions, ask them to identify what *goals* they hope to acheive.

PHASE 2 | PRECONCEPTION

Step 4 | Check Your Biases

Hofstede's *Cultural Dimensions Theory* groups several patterns found across cultures into six categories (or *dimensions*). You will use these dimensions as a starting point to recognize the preconceptions you have about stakeholder values.

In this phase, you will create a few *Assumption Personas*. Think of these as brief dossiers representing imaginary stakeholders. Begin by looking over Hofstede's dimensions of culture and, for each of these, list 3-4 assumptions you have about stakeholder values. These should be purely speculative and should be written down before conducting deeper research into the lives of stakeholders. The idea here is to clearly and concisely outline any preconceptions you are bringing to your design process.

Step 5 | Assumption Personas

Next, take one of your assumptions from each of these dimensions and group them together into a persona. Go ahead and give this persona a proper name. You might even add an avatar to help you imagine what this persona might look like. If you've assigned any demographics to the personas, ask yourself what led you to these conclusions.

Repeat this until you've grouped all your assumptions into several individual personas. Put these personas in a safe place. In subsequent steps, you will validate or invalidate these assumptions. During this process, you may find that some assumptions turn out to be correct and others not – and that's okay! It's better to learn about your preconceptions during the research phases than after your design has been implemented.

Think of this as a fly trap for preconceptions. The purpose of this is to put all your assumptions in one place so you can quarantine, dissect, and disrupt them.

The Dimensions of Culture
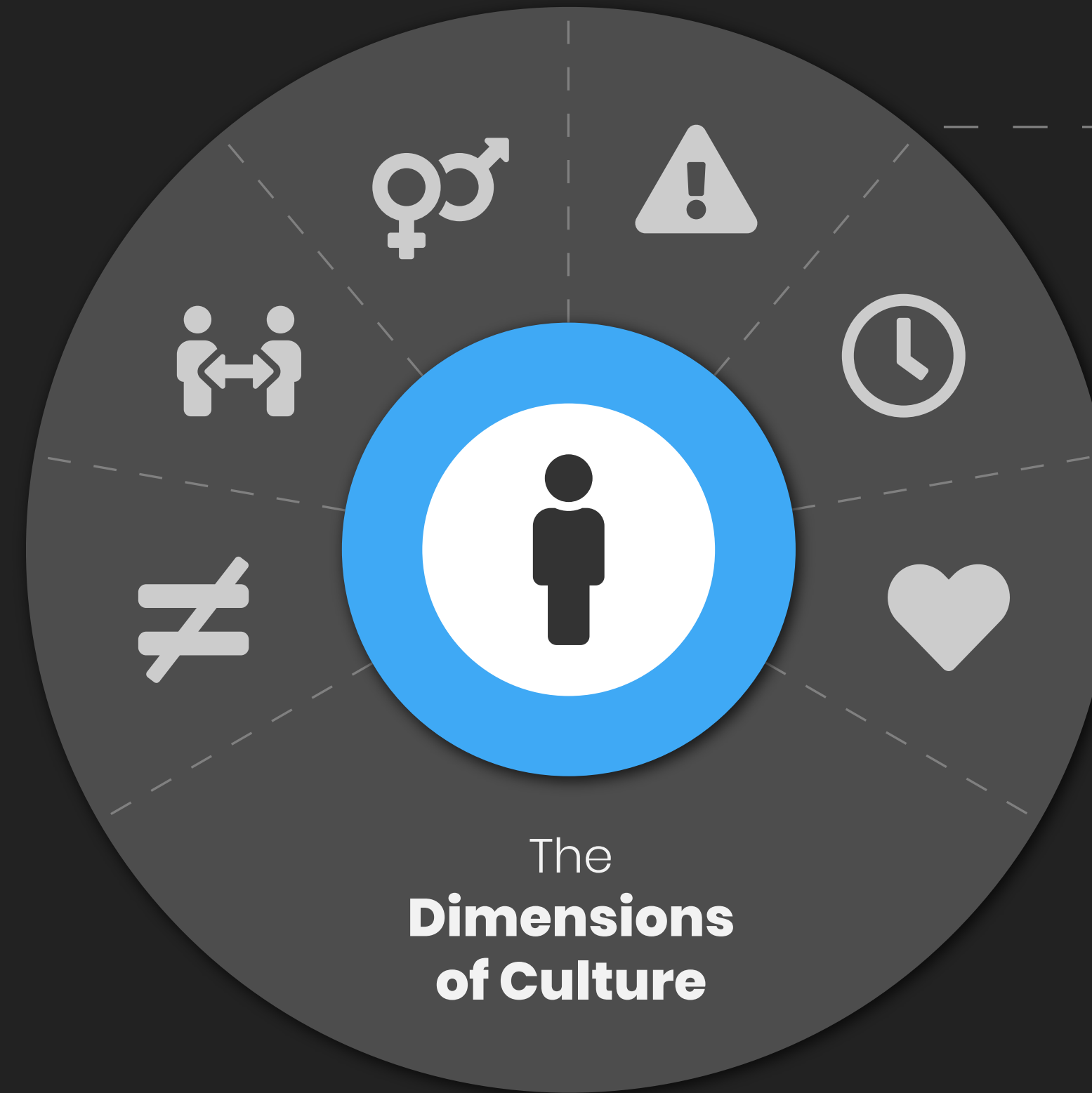
Hofstede's Dimensions of Culture

POWER DISTANCE
the extent to which members of institutions and organizations expect and accept that power is distributed unequally

SOCIAL DEPENDENCE
the extent to which members of a society are dependent upon others and are obligated to maintain social connections

GENDER ROLES
the differences in emotional meanings and societal expectations between those born male and those born female

UNCERTAINTY AVOIDANCE
the extent to which members of a society tend to feel threatened by ambiguous and unknown situations

TIME ORIENTATION
the extent to which a society fosters pragmatic virtues oriented toward short-term or long-term rewards and obligations

INDULGENCE
the extent to which societies encourage or discourage the gratification of basic and natural human desires

PHASE 3 | REALIZATION

Step 6 | Participatory Design Thinking

The *Participatory Design Thinking* model is a hybridization of Participatory Design methods with the Design Thinking workflow. It provides collaborative opportunities at several junction points (Connect, Collaborate, Empower), creating a reciprocal relationship between designer and stakeholder that illuminates biases and uncovers alternative ways of thinking and doing.

Connect:
Use participatory methods to make personal connections with actual stakeholders. Compare the stakeholders you connect with to your assumption personas.

Empathize:
Engage, observe, and consult stakeholders to understand their experiences and motivations. Where possible, immerse yourself in their environment.

Define:
Analyze your observations to find pain points and define the core problems. Use these to create new stakeholder personas. Compare these to your assumption personas and see where they differ.

Collaborate:
Use participatory methods which allow stakeholders to ideate on what they think a solution might look like. It's fine if these are impossible to implement, the purpose is to learn how stakeholders think.

Ideate:
Brainstorming your own solutions to the problems you've defined, keeping in mind the ideas generated by stakeholders in the previous stage. Try to think from the perspective of your stakeholder personas.

Prototype:
Produce several quick prototypes of the solution or any specific features. Think quantity over quality, but bear in mind that they will eventually be developed and tested with groups of stakeholders.

Test:
Rigorously test the best solutions identified during the prototyping phase. This is an iterative stage, and your prototypes will likely change as you learn more about how people think, behave, and feel.

Empower:
Through participation you have made stakeholders into design ambassadors, empowering them to continue the iterative process of understanding the problems they face and ideating solutions.

Step 7 | Reflect

At the end of your project, you should revisit the assumptions you made in Phase 2 and reflect on where you were right, where you were wrong, what methods were successful, and what you might do differently next time. Like Design Thinking, Participatory Design Thinking is an iterative process that doesn't stop at the completion of a project. Your process should never be set in stone, but should always be open to criticism and personal growth.

Participatory Design Thinking

connect · empathize · define · collaborate · ideate · prototype · test · empower

Participatory Methods

At each of these junction points (Connect, Collaborate, Empower) designers will undertake participatory design methods that call into questions their biases and assumptions. These methods reduce the need to speculate about stakeholders and give people the opportunity to voice their concerns and experiences.

Some example exercizes include:

CARD SORT
COGNATIVE TASK ANALYSIS
ANALOGOUS INSPIRATION
INTERVIEW
BEHAVIORAL MAPPING
PEERS OBSERVING PEERS
RAPID ETHNOGRAPHY
USABILITY TESTING
STORYBOARDING
CAMERA JOURNALING
PAPER PROTOTYPING
SHADOWING
AFFINITY DIAGRAMS
5 WHYS
SCENARIOS
WORD ASSOCIATION
ETC . . .