YOUR NAME/FIRM _____

Understand the problem. STEP 1 OF 5

What I'm trying to solve.

Who experiences this? What are they trying to accomplish?

Persona: the person you are designing for, grounded in real needs and experience.

Pick a recent example. Where does the challenge arise, and what happens as a result?

Define the value. STEP 2 OF 5

Why is this problem worth tackling? What would improve, and how could we tell?

Value prompts: funnel size, lead quality, deal size, win rate, deal velocity, retention or expansion.

Explore the possibilities. STEP 3 OF 5

What different approaches could help? Consider the person, the process, information, and tools.

As you go, mark assumptions with a ? so you know what still needs checking.

Build something testable. STEP 4 OF 5

What approach will you try, and what do you need to learn about it?

Prototype: a simple version someone can try. Experiment: a small test designed to help you learn.

What can we make or simulate today? What tools, information, or people can help?

Who will try it, and what will they do? What results would suggest it helps?

Test and adjust. STEP 5 OF 5

What happened? What did we learn, and what would we change or try again?

Evidence is what you observed or measured. Keep it separate from what you hope will happen.

My next small bet back at the firm: what will I test, with whom, and when?

What still needs checking with real people, real data, or in everyday work?

READOUT

Use your notes to tell the story: the problem and who it affects; the value you are aiming for; what you tried and learned; and your next small bet.

If you have not tested yet, say what you plan to test and what you still need to learn.

Keep your own next step in view, even if your table works on someone else's problem.