

# Resources

## The Tools for Your Toolbox

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I love the image of tools in a toolbox as an analogy for the talents, skills, and resources we possess and put to use toward completing our daily work and building our businesses. Think of this collection of resources—books, magazines, websites, schools, and templates—as your starter set of tools.

## Read, Read, and Read Some More

The following books from highly regarded thought leaders are valuable resources on design thinking and its affiliated methodologies, such as innovation, change management, and culture. Some are highly theoretical; some are not. All will give you additional perspectives that I think you'll find valuable.

### Books

Tim Brown, *Change by Design: How Design Thinking Transforms Organizations and Inspires Innovation*. New York: HarperBusiness, 2009.

Nigel Cross, *Design Thinking: Understanding How Designers Think and Work*. New York: Bloomsbury Academic, 2011.

Steve Diller, Nathan Shedroff, and Darrell Rhea, *Making Meaning: How Successful Businesses Deliver Meaningful Customer Experiences*. San Francisco: New Riders, 2008.

Hartmut Esslinger, *A Fine Line: How Design Strategies Are Shaping the Future of Business*. New Jersey: Jossey-Bass, 2009.

Dave Gray, Sunni Brown, and James Macanufo, *Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers*. California: O'Reilly Media, 2010.

Chip Heath and Dan Heath, *Made to Stick: Why Some Ideas Survive and Others Die*. New York: Random House, 2007.

Chip Heath and Dan Heath, *Switch: How to Change Things When Change Is Hard*. New York: Crown Business, 2010.

Tom Kelley, *The Art of Innovation: Lessons in Creativity from IDEO, America's Leading Design Firm*. New York: Crown Business, 2001.

Tom Kelley, *The Ten Faces of Innovation: IDEO's Strategies for Defeating the Devil's Advocate and Driving Creativity throughout Your Organization*. New York: Currency/Doubleday, 2005.

Roger L. Martin, *The Design of Business: Why Design Thinking Is the Next Competitive Advantage*. New York: Harvard Business School Press, 2009.

Grant David McCracken, *Culture and Consumption 11: Markets, Meaning, and Brand Management (v.2)*. Indiana: Indiana University Press, 2005.

Marty Neumeier, *The Designful Company: How to Build a Culture of Nonstop Innovation*. New York: New Riders, 2008.

Dev Patnaik, *Wired to Care: How Companies Prosper When They Create Widespread Empathy*. New Jersey: FT Press, 2009.

Daniel H. Pink, *A Whole New Mind: Why Right-Brainers Will Rule the Future*. New York: Riverhead Trade, 2006

Dov Seidman, *How: Why HOW We Do Anything Means Everything*. New Jersey: Wiley, 2011.

Nathan Shedroff, *Design Is the Problem: The Future of Design Must Be Sustainable*. New York: Rosenfeld Media, 2009.

Robert I. Sutton, *Weird Ideas That Work: How to Build a Creative Company*. New York: Free Press, 2007.

## Never Stop Learning

The Internet and its vast stores of information, for all of its timewasters and nonsense, is our only constantly evolving real-time resource for the latest news, innovations, and developments in design thinking and its related disciplines. The list below includes my go-to resources.

## Websites, Blogs, and Online Tools

- *Smashing Magazine*: [www.smashingmagazine.com](http://www.smashingmagazine.com). Although it's targeted toward web designers and developers, it contains great perspectives on user experience and design that can be applied across the board.
- *Fast Company*: [www.fastcompany.com](http://www.fastcompany.com). The website of one of today's top business magazines is lush with valuable insights on trends and interviews with up-and-coming leaders. To get the full content—and to enjoy the iPad and iPhone apps—you should subscribe. Its value is far beyond its cost.
- *Inc.*: [www.inc.com](http://www.inc.com). Another website for a top business magazine, this one leans more toward advice, tools, and growth-specific content.
- GOOD: [www.good.is](http://www.good.is). When you need a healthy dose of inspiration, a reminder about why doing good is as important as doing well, or proof that there's more to life and business than the bottom line, this is your best resource.
- Mashable: [www.mashable.com](http://www.mashable.com). Hands down, this is the ultimate source for news related to social media and digital innovation.
- Tech Crunch: [www.techcrunch.com](http://www.techcrunch.com). Synonymous with technology news, Tech Crunch also provides great content on start-ups and digital innovation.
- Design Thinking—Thoughts by Tim Brown: [www.designthinking.ideo.com](http://www.designthinking.ideo.com). If there was a god of design thinking, Tim would be it.
- *Psychology Today*: [www.psychologytoday.com](http://www.psychologytoday.com). I personally find the content fascinating and useful in my professional and personal lives.
- Survey Gizmo: [www.surveygizmo.com](http://www.surveygizmo.com). This is a great professional resource for building, distributing, and evaluating survey research. Its brand carries a stronger message than other web-based offerings.

- Survey System Sample Size Calculator: [www.surveysystem.com/sscalc.htm](http://www.surveysystem.com/sscalc.htm). I use this tool when I'm trying to gauge whether a survey would be appropriate for my research project and, if so, what sample size I'll need.
- User Effect 25-point Website Usability Checklist: [www.usereffect.com/topic/25-point-website-usability-checklist](http://www.usereffect.com/topic/25-point-website-usability-checklist). This tool is a great, covers-it-all checklist for website usability. Use it when you build a new site or refresh an existing one.
- Information Architecture Institute: [www.iainstitute.org](http://www.iainstitute.org). IAI is simply the go-to source for information architecture.
- American Institute of Graphic Arts (AIGA): [www.aiga.org](http://www.aiga.org). Another go-to source but not just for graphic arts; the information frequently applies to all forms of design.
- HowTo.Gov/Customer Experience: [www.howto.gov/customer-experience](http://www.howto.gov/customer-experience). Seriously, the federal government has some great information on customer experience. It's presented in terms useful for government agencies, and it's applicable in multiple business sectors.
- Eisman Center for Color Information and Training: [www.colorexpert.com](http://www.colorexpert.com). It is possible to know the psychological and branding implications of color in great depth, and Letrice Eisman is the expert.

## Form Follows Function

To pursue a more in-depth or specialized formal study in design thinking and other related subjects, we are fortunate to have a good number of top-rated programs based in the United States. (I've included one from London, not only because it is a good program, but also because I'd like to go there some day.)

## Education Programs

California College of the Arts: [www.cca.edu](http://www.cca.edu)

Cranfield University/University of the Arts, London:  
[www.cranfield.ac.uk](http://www.cranfield.ac.uk)

Illinois Institute of Technology: [www.iit.edu](http://www.iit.edu)

Pratt Institute: [www.pratt.edu](http://www.pratt.edu)

Rhode Island School of Design: [www.risd.edu](http://www.risd.edu)

Savannah College of Art and Design: [www.scad.edu](http://www.scad.edu)

Stanford University Design School: [www.dschool.stanford.edu](http://www.dschool.stanford.edu)

Suffolk University: [www.suffolk.edu](http://www.suffolk.edu)

## Templates

I unabashedly love templates. They are adaptable and incorporate best practices. More important, they provide a starting point so you aren't staring at a blank page wondering what to put on it. I have included two templates here for documents that tend to present the biggest challenges: a moderator's guide for a focus group and a marketing template. Use them as you will.

## Project Schedule

Market	Day	Time	Segment	Number of respondents
In what city is this focus group?	What's the date?	What's the time?	Describe the group, e.g. women age 25+, HHI \$60K, etc.	How many are participating in this group?

- I. INTRODUCTIONS + RULES** [10 minutes]
- Moderator intro
  - THANK YOU for being here today and for providing us with your insight and opinions
  - Rules of the room: Microphones, video/audio taping, speak one at a time in an audible voice
  - Rules of the road: Here to listen to different opinions, everyone's perspective matters, no right or wrong answers, have fun, get to know others
  - Respondent intro
    1. Name, where from, how long in given market, who lives at home, job/what keeps you busy these days
    2. Favorite program, types of media you watch/interact with
    3. Favorite indulgence at a quick service restaurant
- II. OVERALL QSR HABITS + PRACTICES** [10 minutes]
- Today we are going to have some fun, talking about Quick Service Restaurants and what restaurants you like to eat at. So to begin, let's set the stage....*
1. What makes a restaurant a Quick Service Restaurant? What are some examples of Quick Service Restaurants?
  2. Tell me where [name of restaurant] you typically eat this type of food? Not just where you eat most often, but the range of places you eat. [MODERATOR to list on easel, starting to **draw a landscape** – i.e. where they eat most often written in larger/bolder print]
  3. If you think back over the past year or so, what have been the **biggest changes** in your own personal dining habits?
    - Probe on: Changes in restaurants, changes in frequency – do you visit more/less often + why? changes in types of food, health-consciousness, looking for better prices etc.
- III. FOCUS IN ON QSR CLIENT** [10 minutes]
- OK, let's shift our focus and talk about one of these restaurants in particular – [Insert Client Name]...*

**Figure D-1a.** Sample moderator's guide (page 1). Source: Jessica Massay, JUMP Insights. Used with permission

Moderator's Guide  
Example for a Quick Service Restaurant

1. What's the first thing that comes to mind when you think of *[Insert Client Name]*? **[Top-of-mind associations]**
  2. What does *[Insert Client Name]* do **Differently** than other Quick Service Restaurants? Is there something they do **Better**? Is there anything they don't do as well? (*This will get us to current positioning/perceptions before reviewing advertising*)
    - PROBE on: Customization, Specialized Items, Service (table + overall), Quality ingredients, Different products, Open 24 hours etc.
    - PROBE: What gives you this impression of *[Insert Client Name]*? Experience, Advertising, What others say etc.
    - We will have time to deep dive into 1-2 competitors here.
  3. If you had to give me **5 words** that sum up what *[Insert Client Name]* is all about **TODAY**, what would they be? [Moderator to write up on easel for later reference] Has this changed? If so, why?
- IV. REVIEW OF *[Insert Client Name]* ADVERTISING** **[35 minutes]**
- Let's switch gears a bit... now we are going to have some fun and look at some *[Insert Client Name]* advertising – you are my expert panel and I need your opinions on these ads...*
1. Who **has seen** any *[Insert Client Name]* advertising? If so, what do you recall about it?
  2. Has it **changed** over the years? If so, how?
    - PROBE on: Tone, Feel, Message, Testimonials, Products etc.
    - Compare – 5 years ago vs. today
  3. Let's take a look at a few *[Insert Client Name]* **ads**. As we watch each one, please take a minute to jot down a few things on your paper for me:
    - A rating from 1 to 5 where 1 = Doesn't connect with me at all and 5= this ad totally gets me and makes me want to go to *[Insert Client Name]* [MODERATOR to write on board for reference]
    - Any top-of-mind words that come to mind as you watch the ad – *These words don't have to be in the commercial.*
    - Have any of you seen this particular commercial before?
  4. For each ad, debrief on the following:
    - **Main message** + comprehension [PROBE on **brand vs. product messaging balance**]
    - **Likes/dislikes**, anything confusing
    - **Relevance** – who is this ad for? Is it talking to you? Why/why not? Does it feel "real" – relevant to Latinos or does it feel like just a translation?
    - **Uniqueness** – how is this different than ads you see for other QSR? Is it better, worse, just different?
    - **Feeling** – how does this ad make you feel about Whataburger?
    - **Action** - Does it make you want to do anything right now?

**Figure D-1b.** Sample moderator's guide (page 2)

5. Specific probes on advertising:
  - Brand – What is the role of *[Insert Client Name]* in this ad? How do you know / what tells you that message?
  - Product – What does the product tell you about *[Insert Client Name]*?
  - Motivation – What do you want to do after seeing this ad? Does it motivate you to do something? If so, what?
6. Is there anything missing? Is there anything that *[Insert Client Name]* should/could show or talk about that would be interesting and important to you as a consumer?

#### V. PRODUCT / MENU SESSION [25 minutes]

OK, this is the last part of our group and we're going to make it a working session – an idea session – what I'm looking for from you now is ideas – any idea is a good one!

[MODERATOR to put up a **big clock** with key dayparts outlined - morning, mid-morning, lunch, afternoon, dinner, late night. Also, hand out *[Insert Client Name]* menu sheets for each respondent and put one up on PPT]

1. The first thing I'll ask you to do is tell me your favorite products to eat at *[Insert Client Name]*. Let's do this by time of day – tell me your favorite for breakfast, lunch, dinner, snack....[**Top of mind, before seeing menu**]
2. Now let's take a look at a *[Insert Client Name]* menu. Can you **circle** the items you eat most frequently? Now, can you **underline** the items that you eat sometimes? Can you put an "X" through the items you never order?
  - Tell me a little bit more about why you LOVE about the items you eat most often?
  - How about the items you eat less often – what's holding you back?
  - Finally, the items you don't eat – what's stopping you? Time permitting only
3. Look at the items you love – and tell me:
  - WHO do you usually eat this item with? Who are you with? Do they order the same thing or something different?
  - WHEN do you eat this? What time of day is it "right" for? When else would you consider eating it? When would you NOT consider ordering it?
  - Is there something on the menu that you would like to see offered at another time of day? Why? Are there any items that are only for specific times of day?
4. How about customization? How/Do you customize your order?
  - PROBE: bacon, salsa, cheese, jalapenos etc. What do you do to make it "your" order?
5. Is there something missing from the current menu that you would like to see *[Insert Client Name]* offer? If so, what would it be? What would make you go to *[Insert Client Name]* even more often?

**Figure D-1c.** Sample moderator's guide (page 3)



Moderator's Guide  
Example for a Quick Service Restaurant

**VI. CLOSE**

**[5 minutes]**

To finish, we are going to look at one print ad from *[Insert Client Name]*:

- What do you think about the bilingual offer?
- Which would you read?
- What are your first thoughts about the offer – appealing or not? Why?

Address any outstanding comments from the client  
Thank respondents for their time and information

**Figure D-1 d.** Sample moderator's guide (page 4)

**Marketing Plan Template****I. The Business Case**

- What is the business case for what you want to accomplish?
- One to two paragraphs
- Use supporting data

**II. Strategic Overview**

- A description of your business/product/service and why it effectively satisfies the business case. One to two paragraphs

**III. Marketing Objectives**

- Use bullet points
- Illustrate the “big picture” you want to accomplish
- No more than five objectives or this will get unwieldy

**IV. Communications Objectives**

- More detailed than the marketing objectives
- Focus on tactics

**V. Target Audiences**

- One or two audiences that will provide you with greatest opportunity for a return. Use research to guide you
- Use a narrative description of the target audience
- Use any relevant demographic data

**VI. Marketing Strategies**

- Now the plan begins to show some greater detail
- Include more specification as to how to accomplish the plan's marketing objectives
- Outline should be broad strokes of activity

**VII. Key and Supporting Messages**

- Can be omitted depending upon the process you and/or your team went through
- Includes one key message and relevant supporting messages
- Consider specific word choices

**VIII. Tactical Plan**

- Outline the nitty-gritty details of your marketing plan
- Articulate what you'll do to follow your strategies and accomplish your objectives
- Include as much detail as possible for each of the resources you listed as tactics

**Figure D-2a.** Marketing plan template (page 1)

- Create a timeline to delineate what happens and when

**IX. Measurement**

- Addresses how you will measure your efforts in all areas
- Decide if you want to measure the performance of the marketing campaign as a whole or each tactic individually
- Identify KPIs and track performance against them

**Figure D-2b.** Marketing plan template (p. 2)