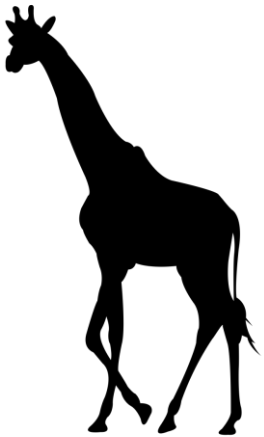
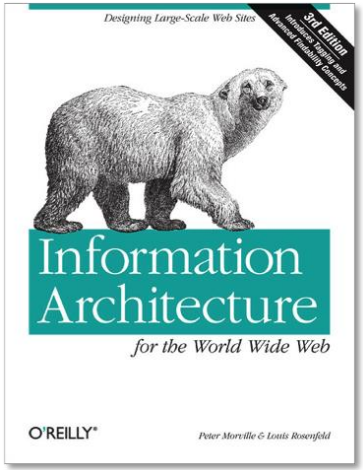
Planning

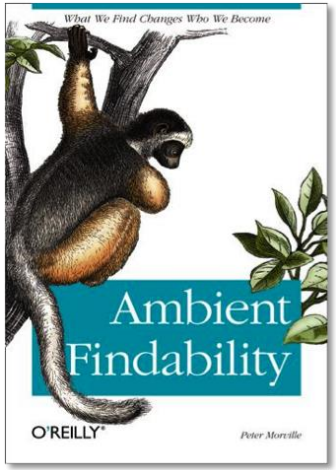
for Strategic Design

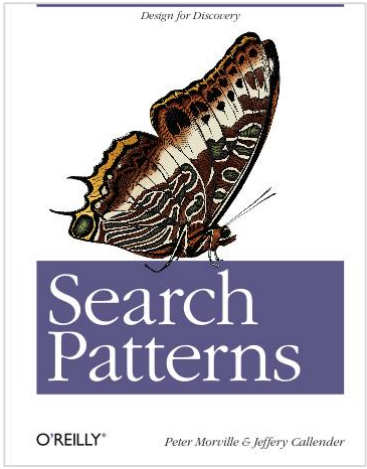


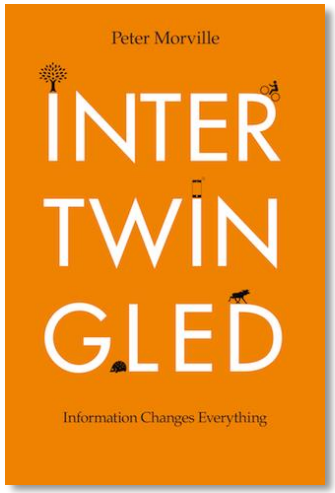
Peter Morville, Internet User Experience 2017

The LIBRARY of CONGRESS
HARVARD
POLAR BEARS INTERNATIONAL
Microsoft
NATIONAL CANCER INSTITUTE
AMGEN
macy's
IBM
CR Consumer Reports
INTERNATIONAL MONETARY FUND
Genentech
P&G
CISCO
vodafone
VERISIGN
MOTOROLA
trulia
DUPONT
APPLIED MATERIALS
CSC
CHRYSLER
THE WEATHER CHANNEL
L.L.Bean
Johnson & Johnson
EY
DOW
aadl.org
Vanguard
ENCYCLOPÆDIA Britannica
Center for InspiredTeaching
at&t


Designing Large-Scale Web Sites
3rd Edition
Information Architecture
for the World Wide Web
O'REILLY
Peter Morville & Louis Rosenfeld


What We Find Changes Who We Become
Ambient Findability
O'REILLY
Peter Morville


Design for Discovery
Search Patterns
O'REILLY
Peter Morville & Jeffery Callender


Peter Morville
INTER
TWIN
GLED
Information Changes Everything

Planning

Planning

for Strategic Design

Introduction, Purpose, Principles, Practices

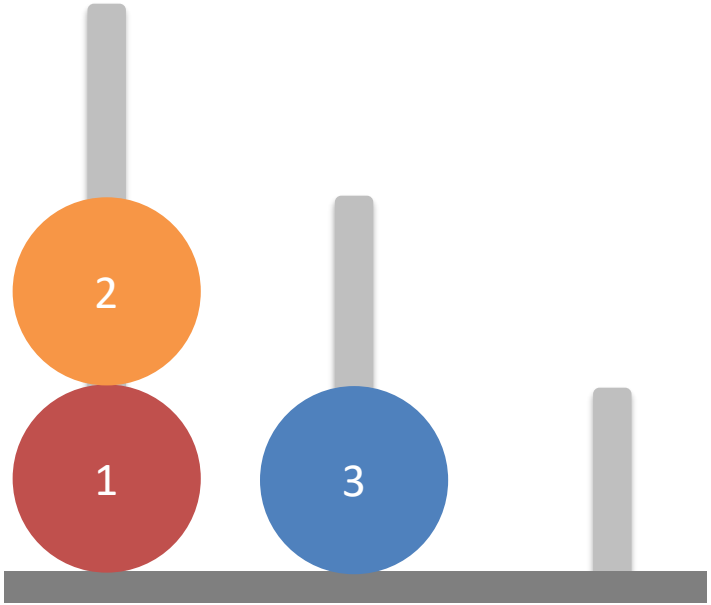
The Ants and the Grasshopper

On a cold, frosty day the ants began dragging out some of the grain they had stored during the summer and began drying it. A grasshopper, half-dead with hunger, came by and asked for a morsel to save his life.

"What did you do this past summer?" responded the ants.

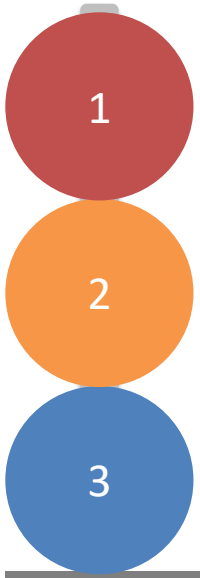
"Oh," said the grasshopper, "I kept myself busy by singing all day long and all night too."

"Well then," remarked the ants, as they laughed and shut their storehouse, "since you kept yourself busy by singing all summer, you can do the same by dancing all winter."



Start

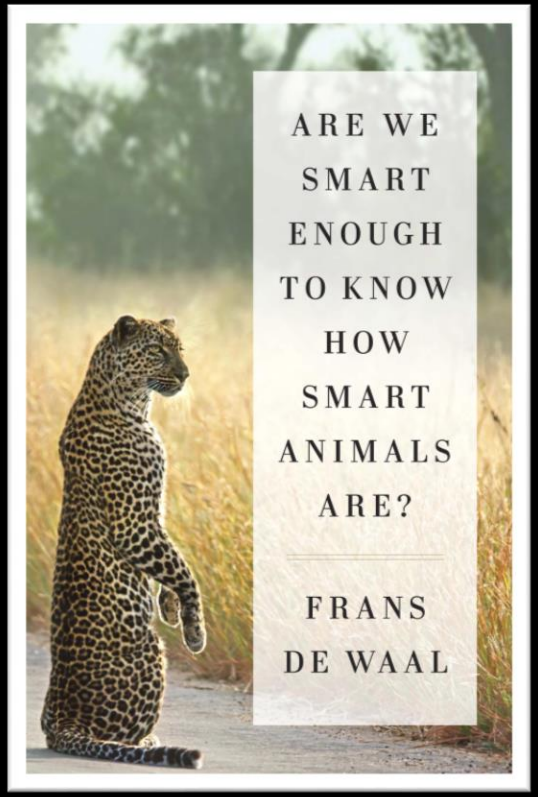
➔

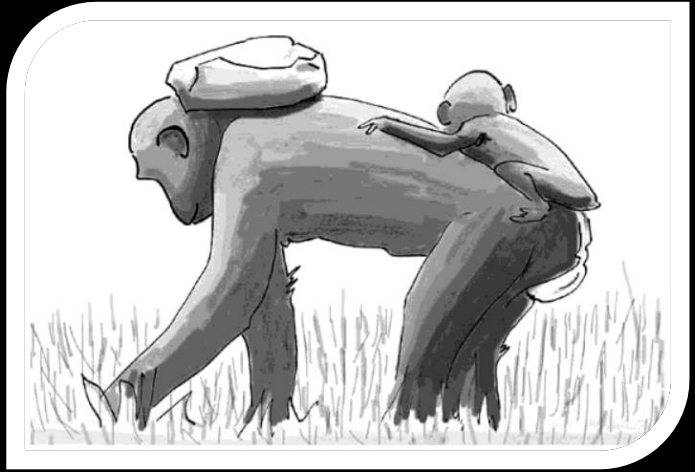


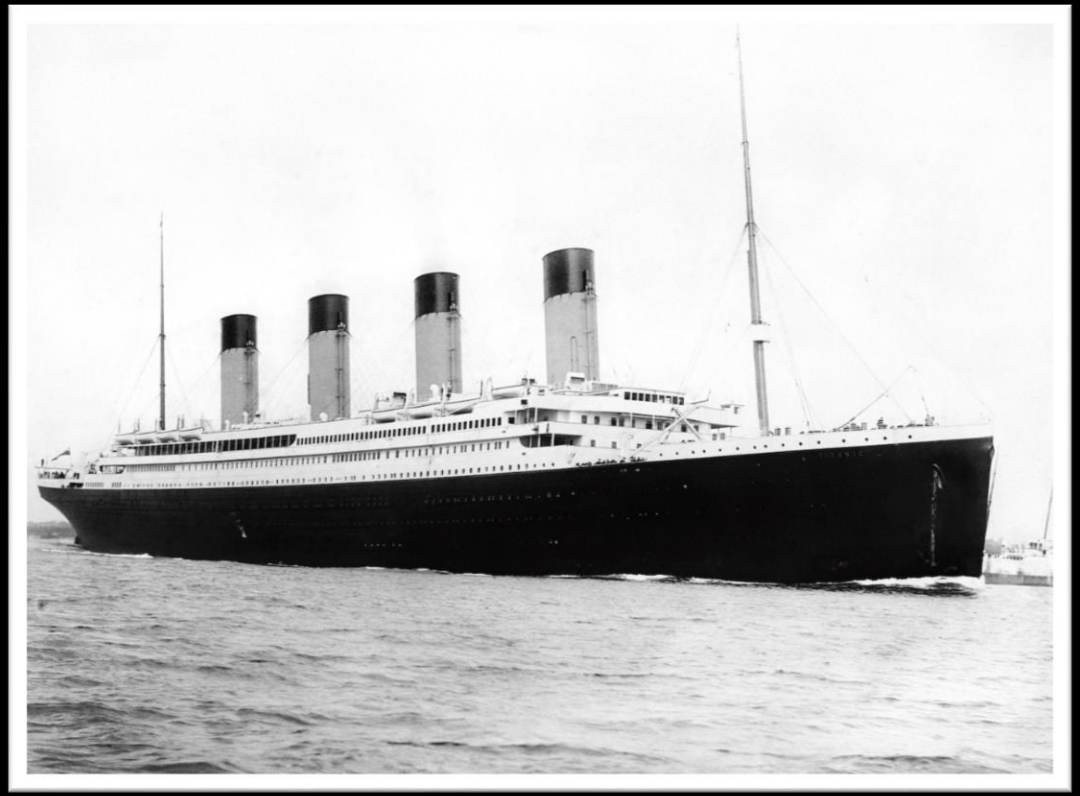
Goal

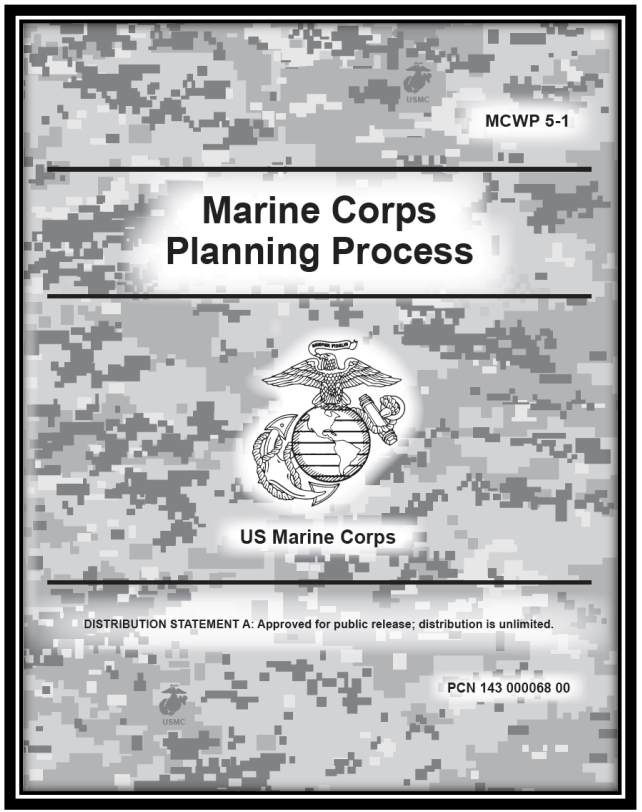
"Planning is the crowning achievement of human cognition."

The Cognitive Psychology of Planning (2005)


ARE WE SMART ENOUGH TO KNOW HOW SMART ANIMALS ARE?
FRANS DE WAAL

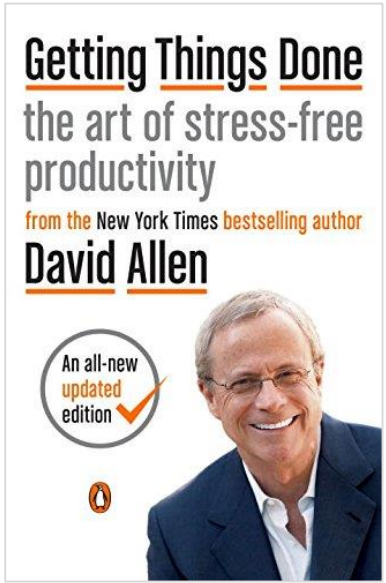


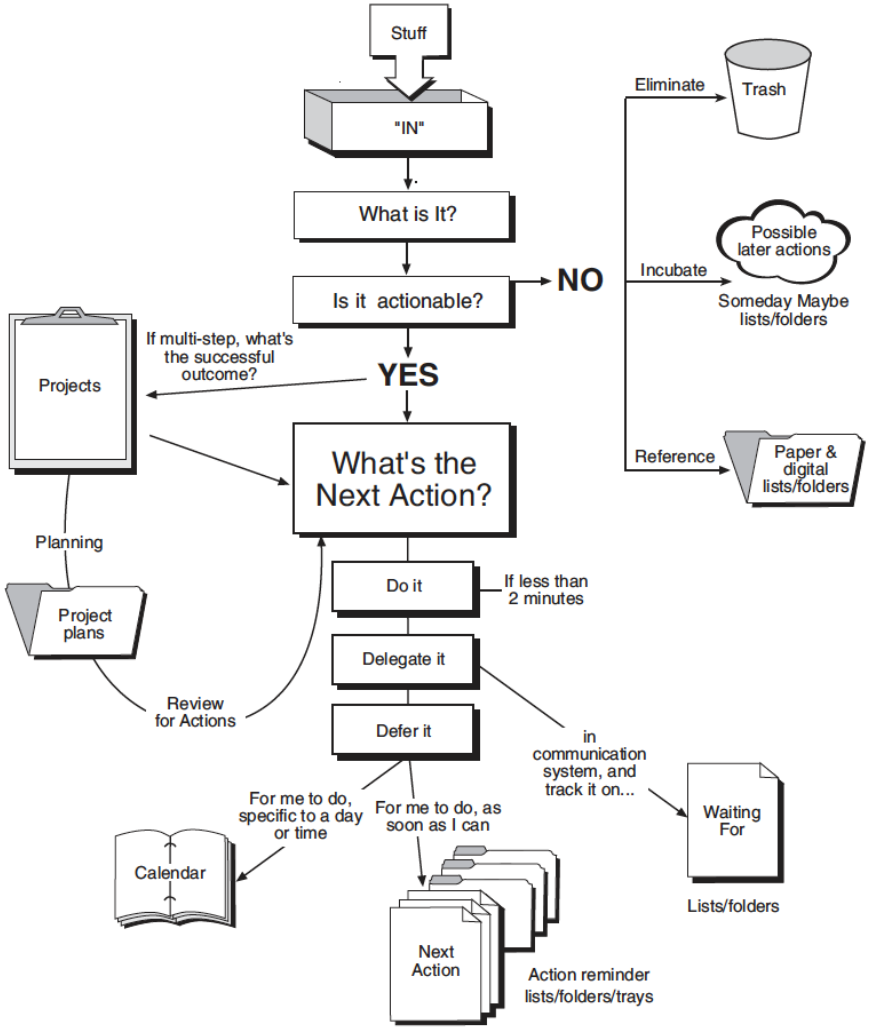


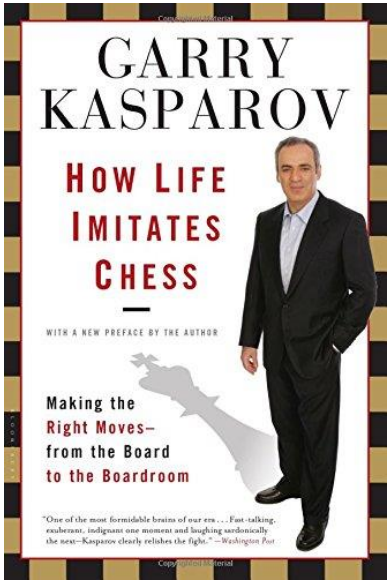


“Planning is the art and science of envisioning a desired future and laying out effective ways of bringing it about.”

“The purpose of **design** is to achieve a greater understanding of the environment and the nature of the problem in order to identify an appropriate conceptual solution.”

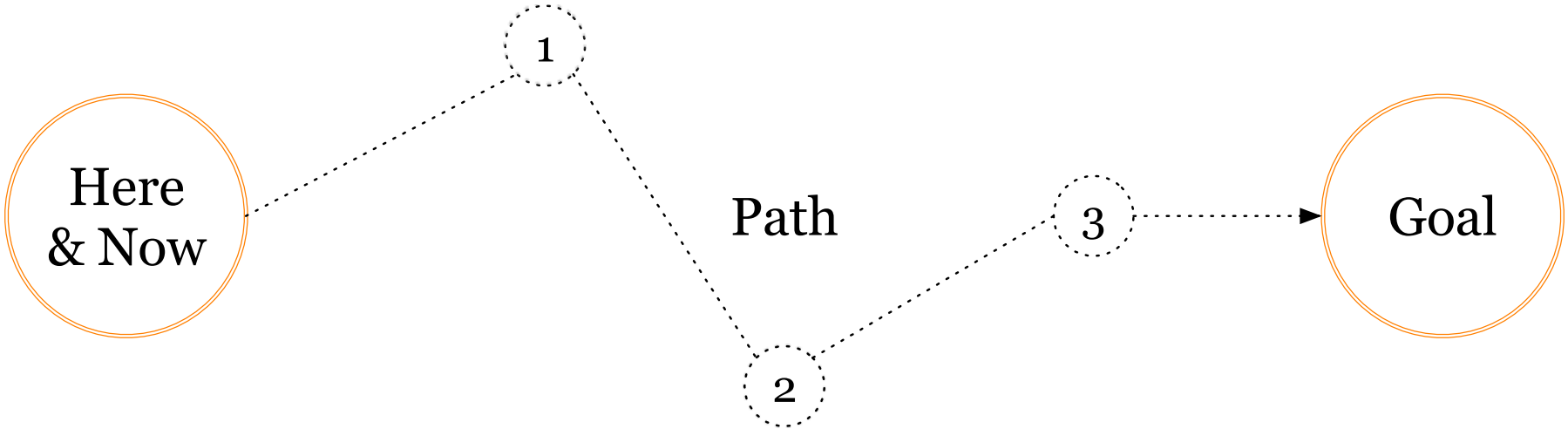

Getting Things Done
the art of stress-free productivity
from the New York Times bestselling author
David Allen
An all-new updated edition

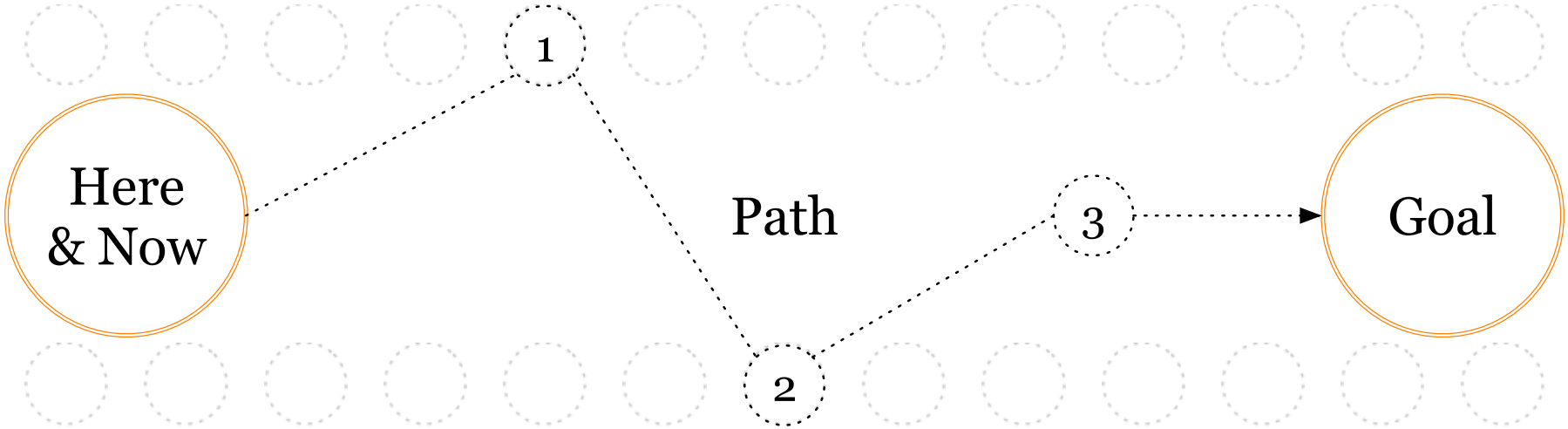

Stuff
"IN"
What is It?
Is it actionable?
NO
Eliminate
Trash
Incubate
Possible later actions
Someday Maybe lists/folders
YES
If multi-step, what's the successful outcome?
Projects
What's the Next Action?
Reference
Paper & digital lists/folders
Planning
Project plans
Review for Actions
Do it
If less than 2 minutes
Delegate it
Defer it
in communication system, and track it on...
Waiting For
Lists/folders
For me to do, specific to a day or time
Calendar
For me to do, as soon as I can
Next Action
Action reminder lists/folders/trays



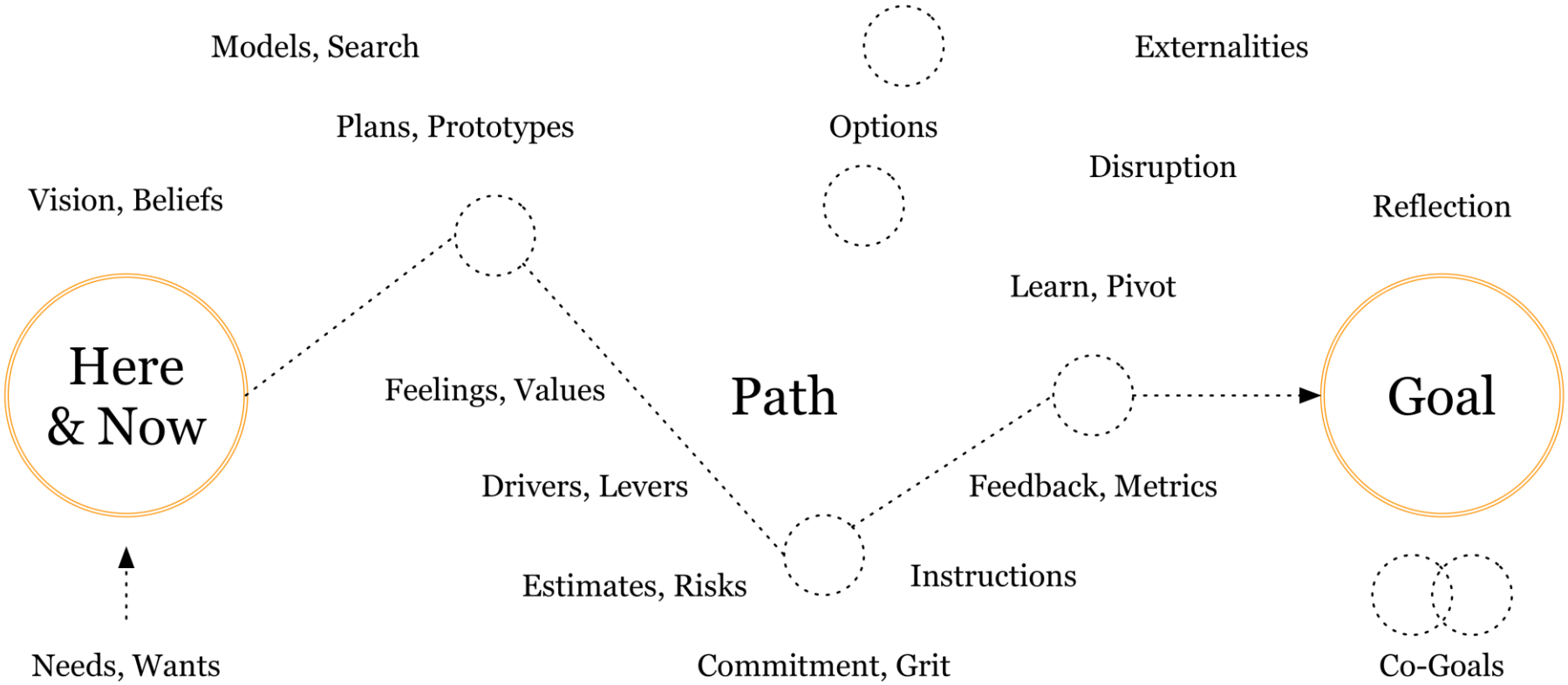
Better decision-making cannot be taught, but it can be self-taught.

A key to developing successful strategies is to be **aware** of your strengths and weaknesses, to know what you do well.


Here
& Now
1
Path
2
3
Goal



C O N T E X T


Models, Search
Externalities
Plans, Prototypes
Options
Disruption
Vision, Beliefs
Reflection
Learn, Pivot
Here & Now
Feelings, Values
Path
Goal
Drivers, Levers
Feedback, Metrics
Estimates, Risks
Instructions
Needs, Wants
Commitment, Grit
Co-Goals
C O N T E X T

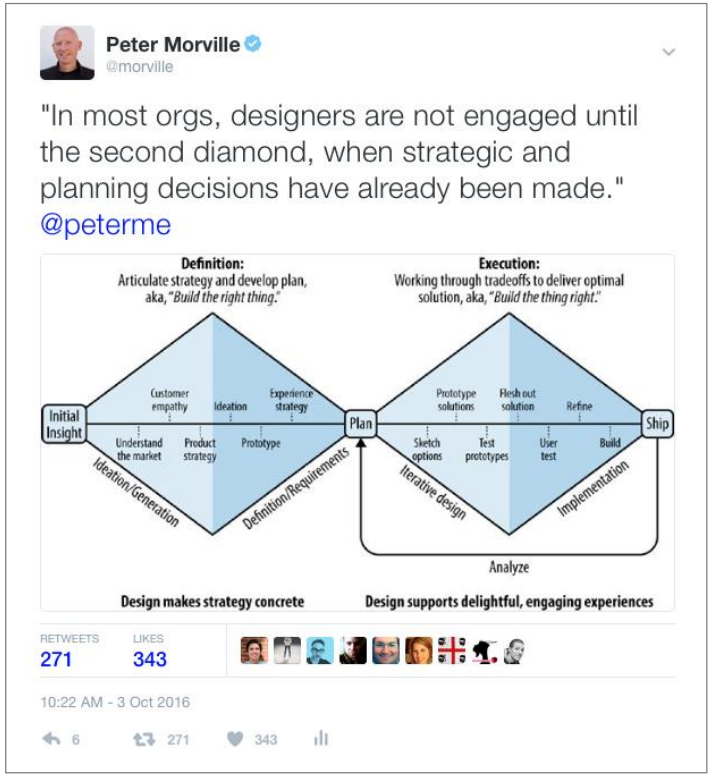
10 Theses

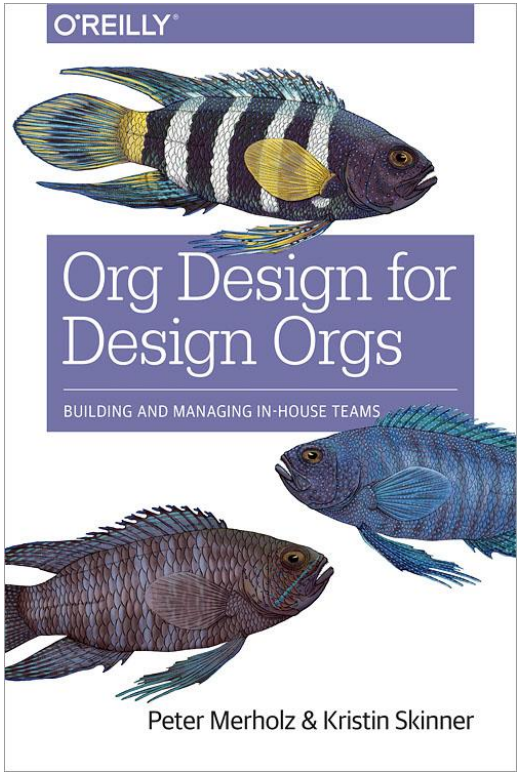
1. Planning is impossible and essential (*prediction, uncertainty*)
2. Planning is making (*false dichotomy, commitment, discipline*)
3. Planning is a skill (*we can get better, practice, understanding*)
4. Planning creates possibility (*autopilot, lever*)
5. Plans are built on beliefs (*models, research, experiments*)

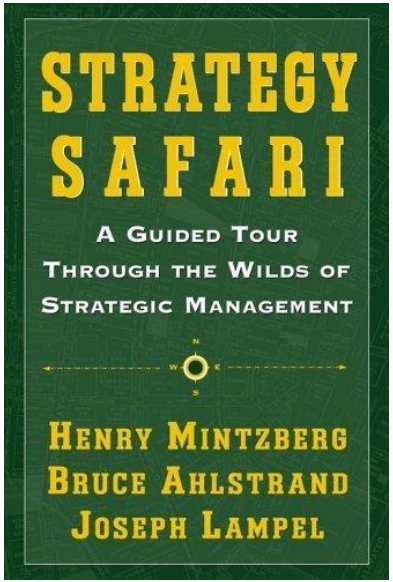
10 Theses

6. Strategies are built on options (*habits as traps, awareness*)
7. There is no one right way (*preference, context, fit*)
8. We must use experts wisely (*gaps, tradeoffs, incentives*)
9. Planning can be fun (*meaningful goals, health, happiness*)
10. We can plan a better future (*technology, optimism, hope*)

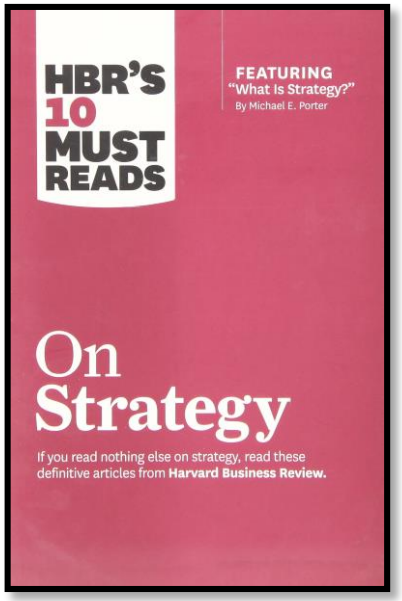
Strategic Design







- Design
- Planning
- Positioning
- Entrepreneurial
- Cognitive
- Learning
- Power
- Cultural
- Environmental
- Configuration

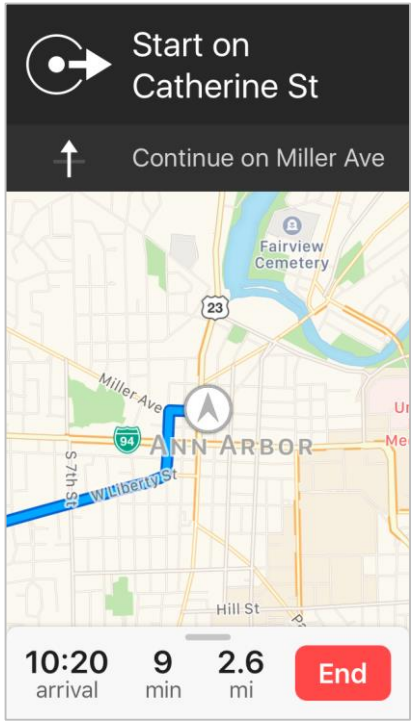


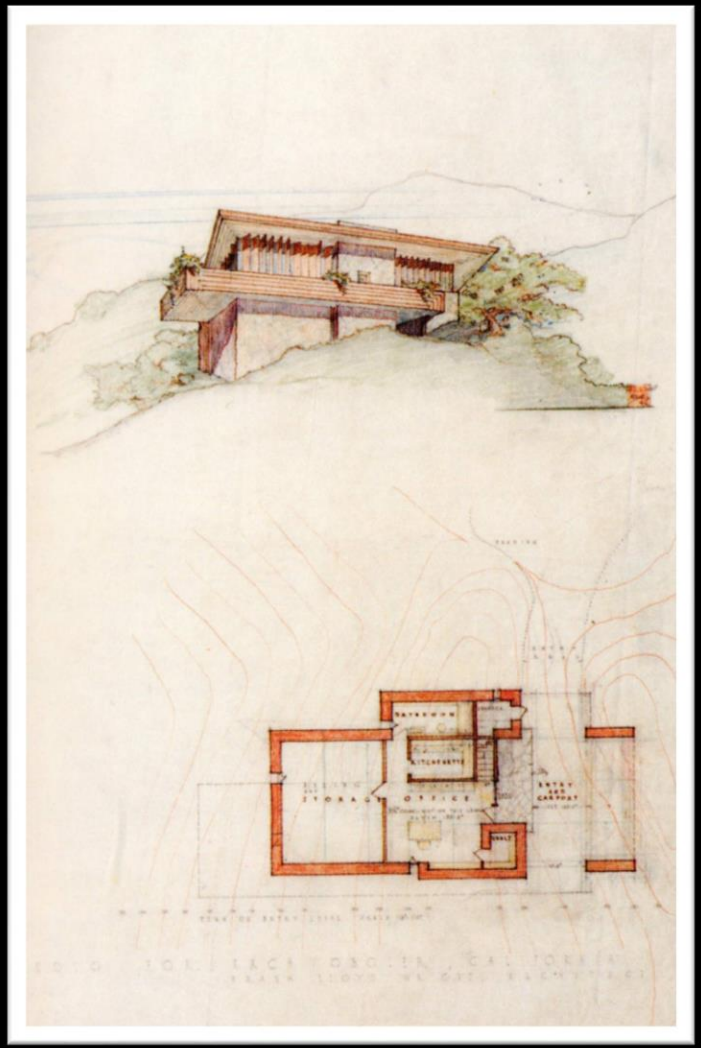
What is Strategy? *by Michael Porter*

- Strategy is the creation of a unique and valuable position involving a different set of activities.
- Operational effectiveness (*performing similar activities better than rivals*) is not strategy.
- A sustainable strategic position requires tradeoffs.

Digital Strategy

- See any differences?
- Why might they exist?
- What are the tradeoffs?





Strategic Designers

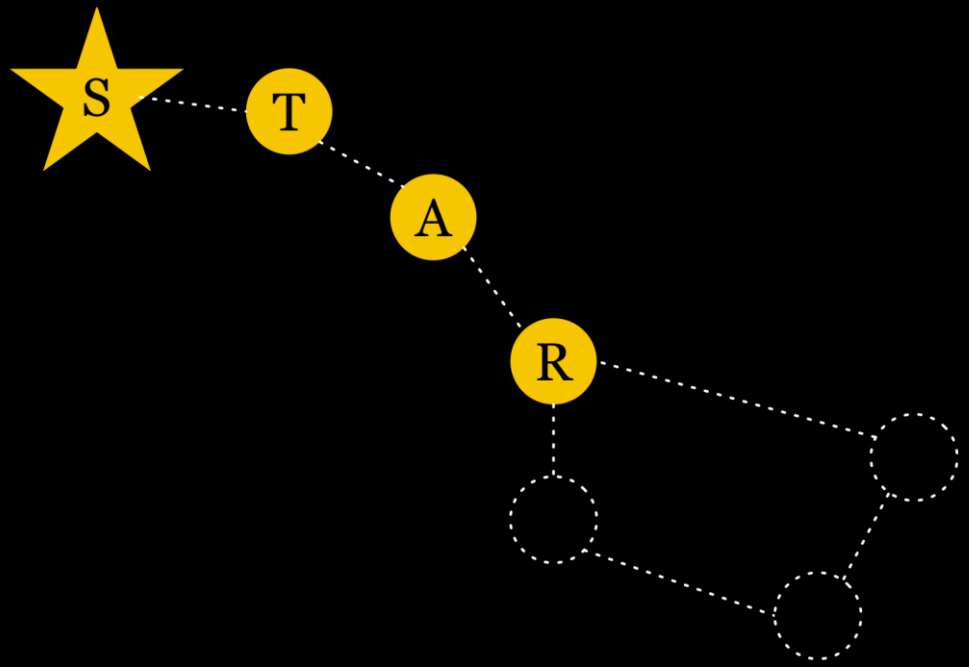
1. Align with business strategy
2. Shape digital + experience strategy
3. Help executives with planning

Planning

for Strategic Design

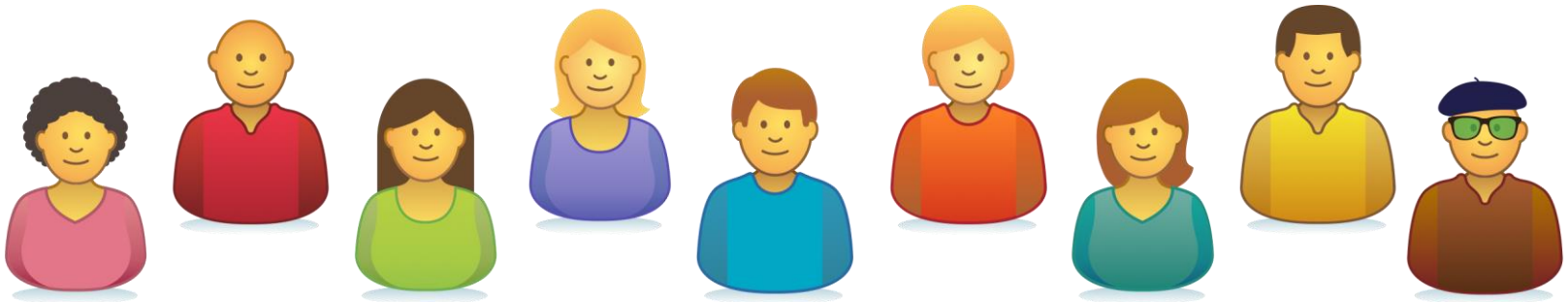
Introduction, Purpose, Principles, Practices

Social
Tangible
Agile
Reflective



★ Social

- What (*plan with people, early and often*)
- Who (*family, friends, mentors, stakeholders*)
- Why (*get started, better ideas, empathy, buy-in*)



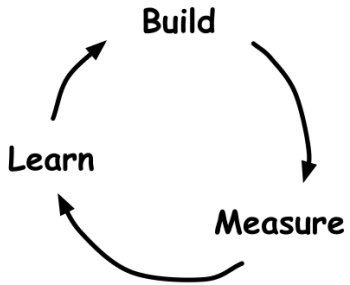
★ Tangible

- What (*get ideas out of your mind-body*)
- Why (*embodied cognition, extended mind, collaboration*)
- How (*writing, sketching, modeling, prototyping*)

"How can I know what I think until I see what I say?" - E.M. Forster

★ Agile

- What (*plan for disruption, embrace change*)
- Why (*volatility, uncertainty, complexity, ambiguity*)
- How (*Agile, Lean, improv, optionality, mindfulness*)



“Plans are worthless, but planning is everything.” - Eisenhower

★ Reflective

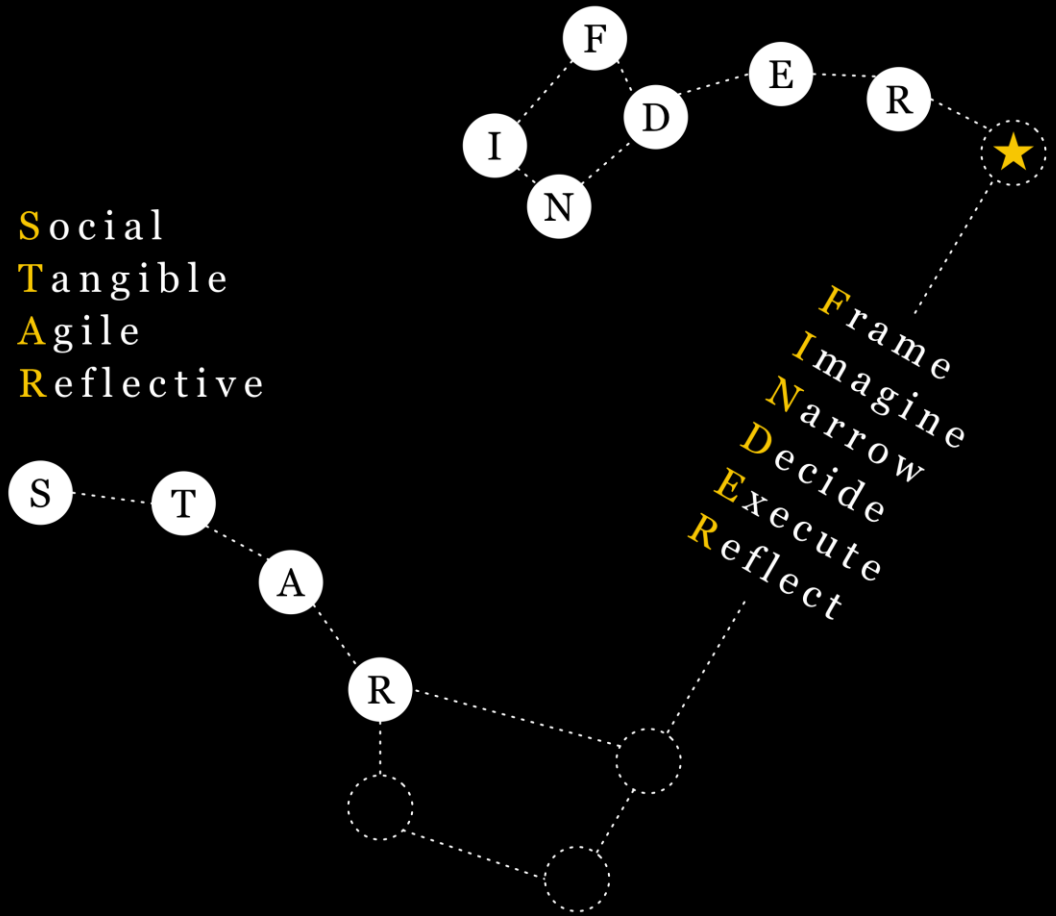
- What (*question beliefs, methods, and goals*)
- Why (*human fallibility, context shifts, wisdom*)
- How (*metrics, feedback, metacognition, meditation*)

“Do you know how to make God laugh? Tell him your plans.”

Planning

for Strategic Design

Introduction, Purpose, Principles, Practices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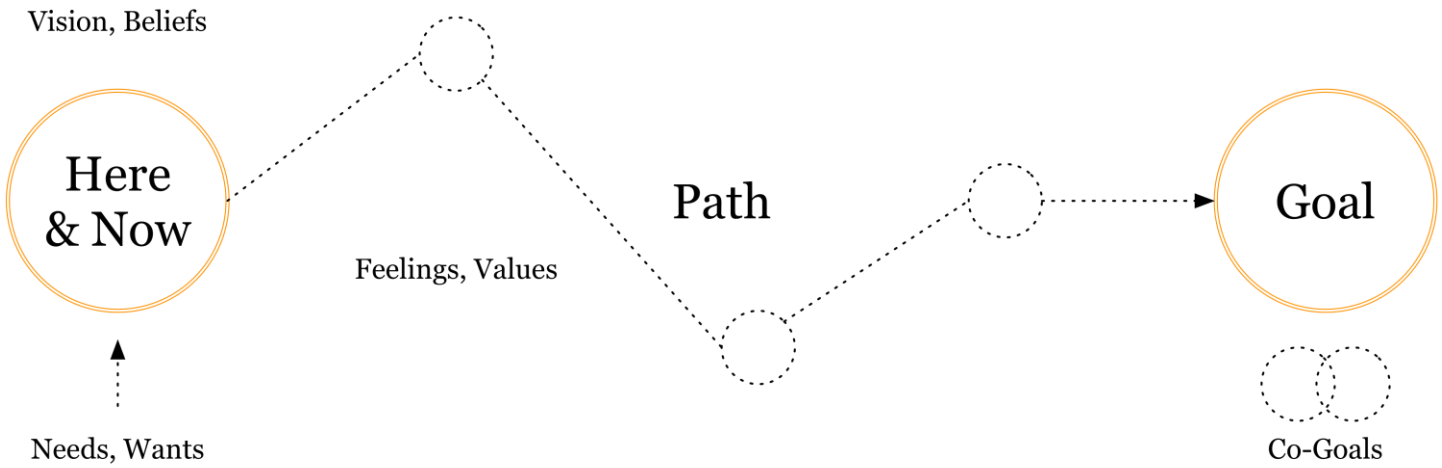
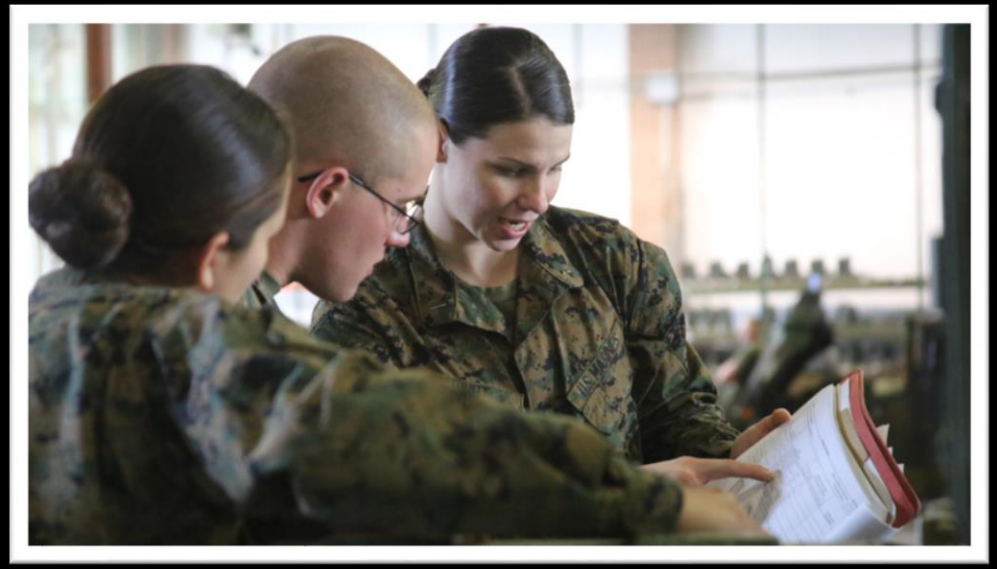
Social
Tangible
Agile
Reflective
Frame
Imagine
Narrow
Decide
Execute
Reflect

★ Framing

- What (*seeing problems, defining goals, designing process*)
- How (*research, sketching, mental models, OKRs, impossible list*)

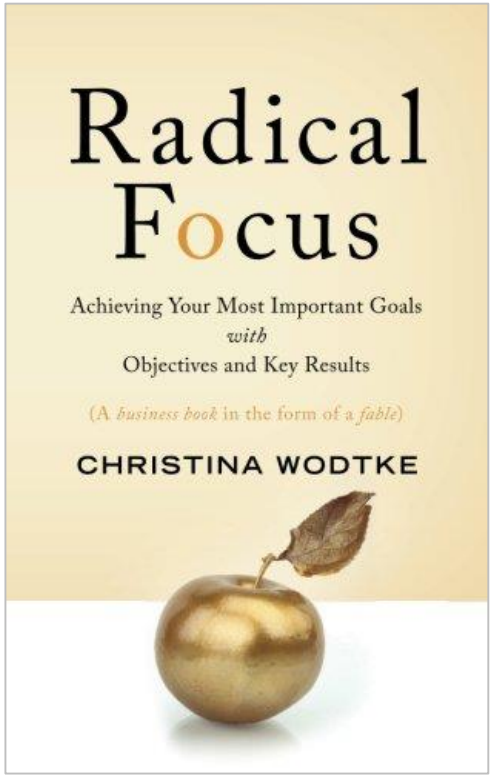


Social | Tangible | Agile | Reflective



Marines Corp Planning Process

An essential function of planning is to promote understanding of the problem. Framing is the most important step.



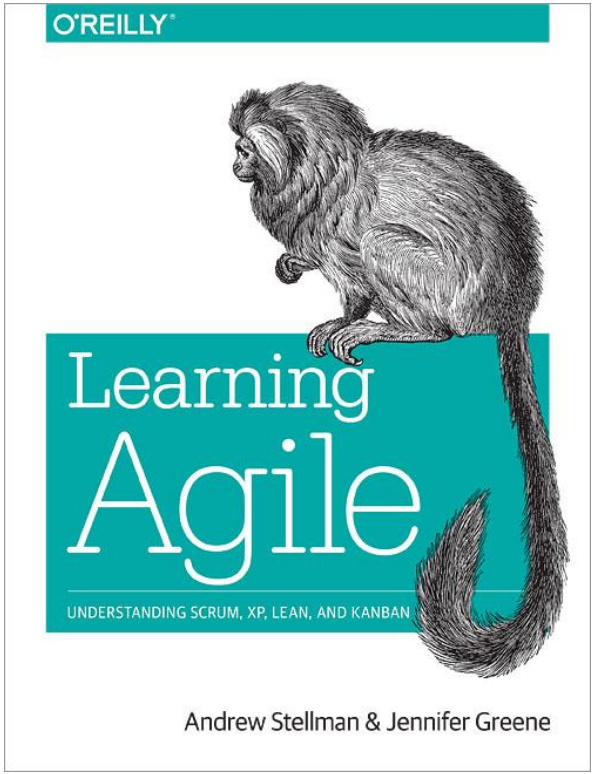
HARVARD | BUSINESS | SCHOOL

WORKING KNOWLEDGE

Business Research for Business Leaders

Goals Gone Wild: The Systematic Side Effects of Over-Prescribing Goal Setting

- The harmful side effects of goal setting are far more serious and systematic than prior work has acknowledged.
- The use of goal setting can degrade employee performance, shift focus away from important but non-specified goals, harm interpersonal relationships, corrode organizational culture, and motivate risky and unethical behaviors.

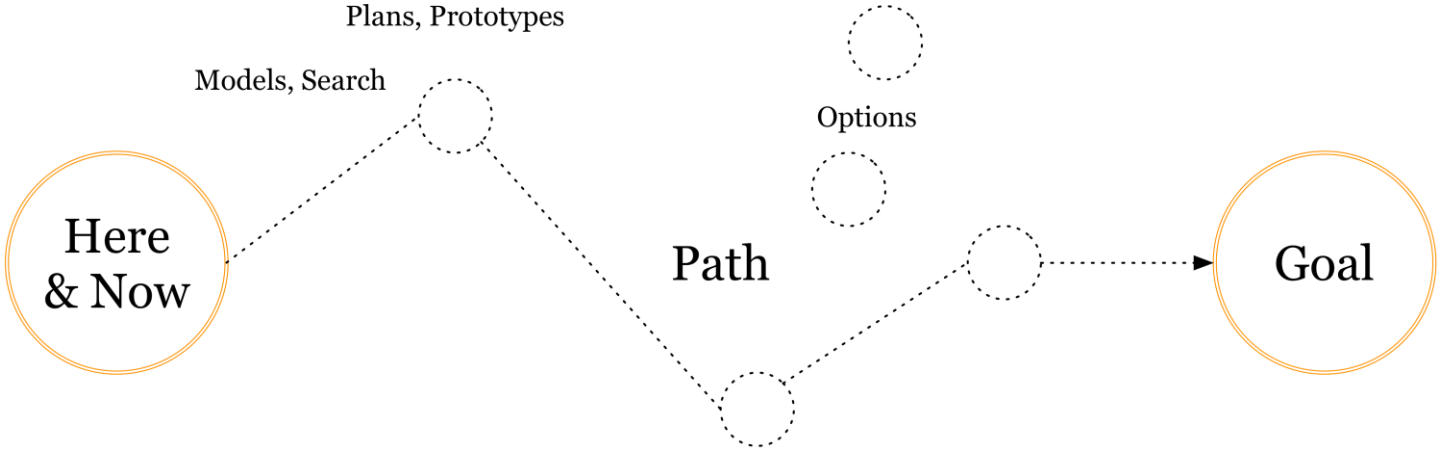


"One of the most common myths of agile software development is that agile teams don't plan. In fact, agile teams do a much more thorough job of planning than many traditional project teams."

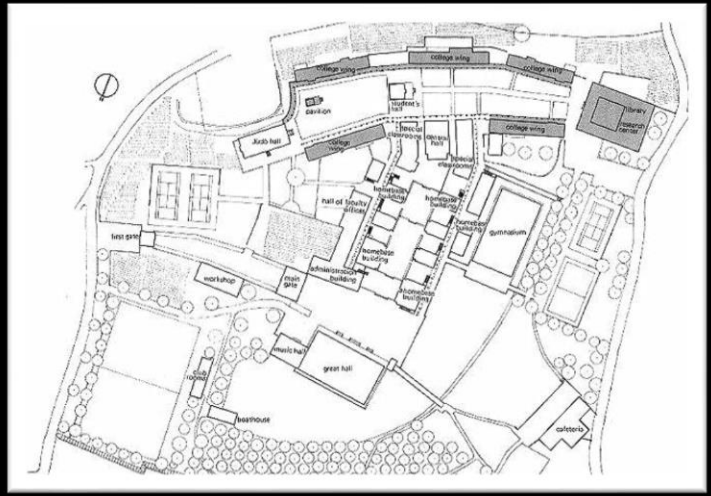
short iterations, pairing, daily standups, last responsible moment, tests, fail fast, feedback, reflection

★ Imagining

- What (*expanding awareness of paths and possibilities*)
- How (*research, mental models, counterfactuals, play, simulation*)



Social | Tangible | Agile | Reflective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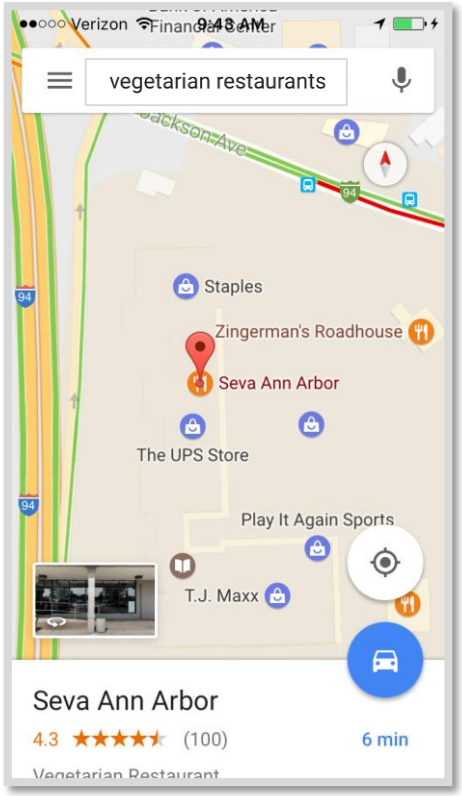
Verizon
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vegetarian restaurants
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Zingerman's Roadhouse
Seva Ann Arbor
The UPS Store
Play It Again Sports
T.J. Maxx
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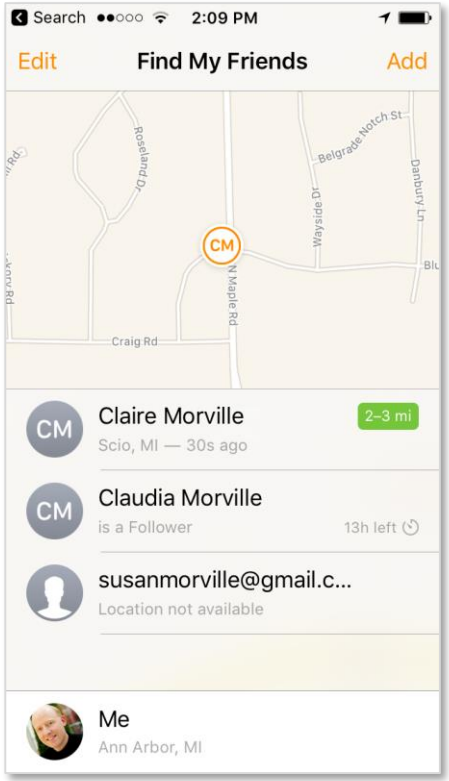
6 min
Vegetarian Restaurant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is a Follower
13h left
susanmorville@gmail.c...
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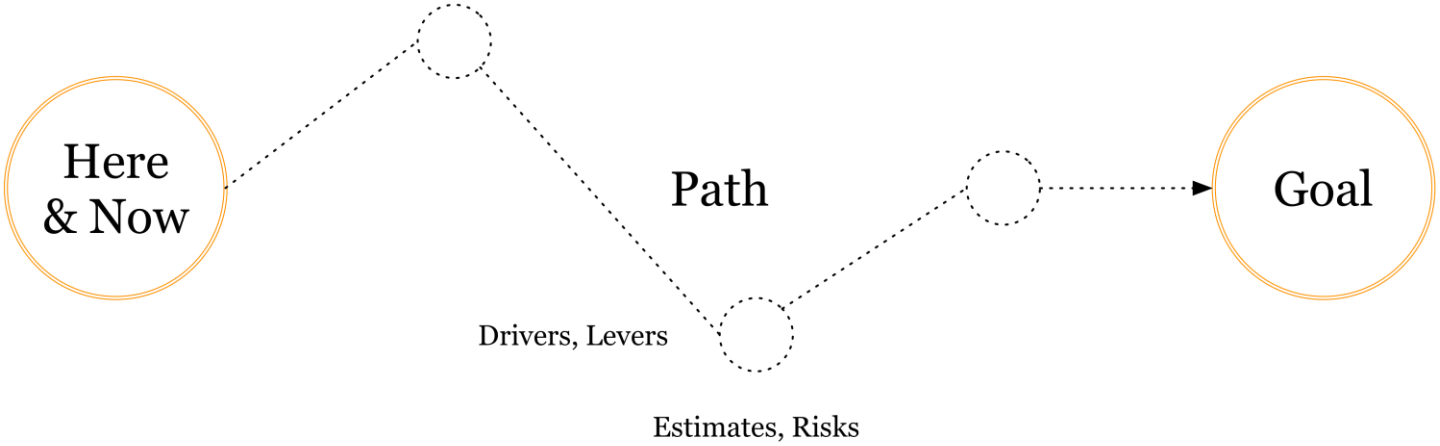
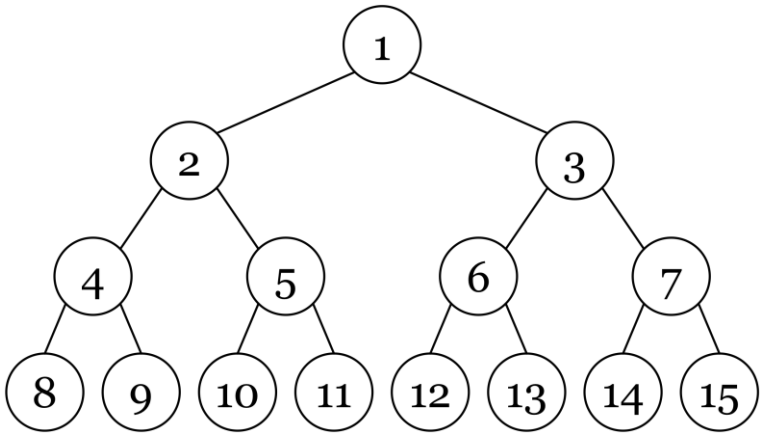
Me
Ann Arbor, MI

amazon

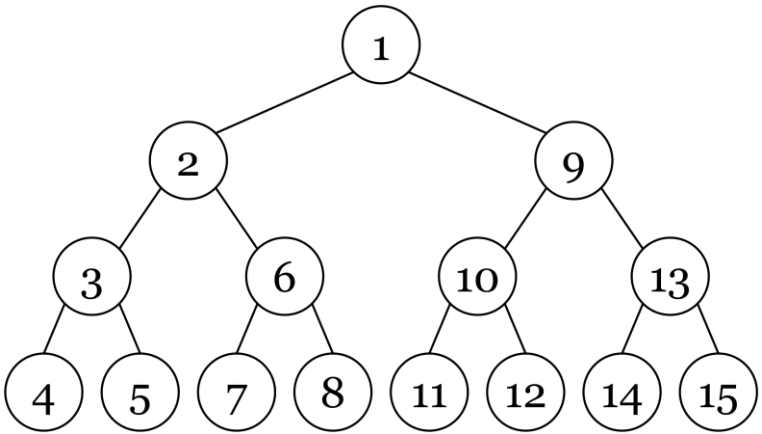
★ Narrowing

- What (*evaluating and filtering paths + options, estimates, risks*)
- How (*research, COG analysis, planning poker, affinity estimation*)





Breadth First

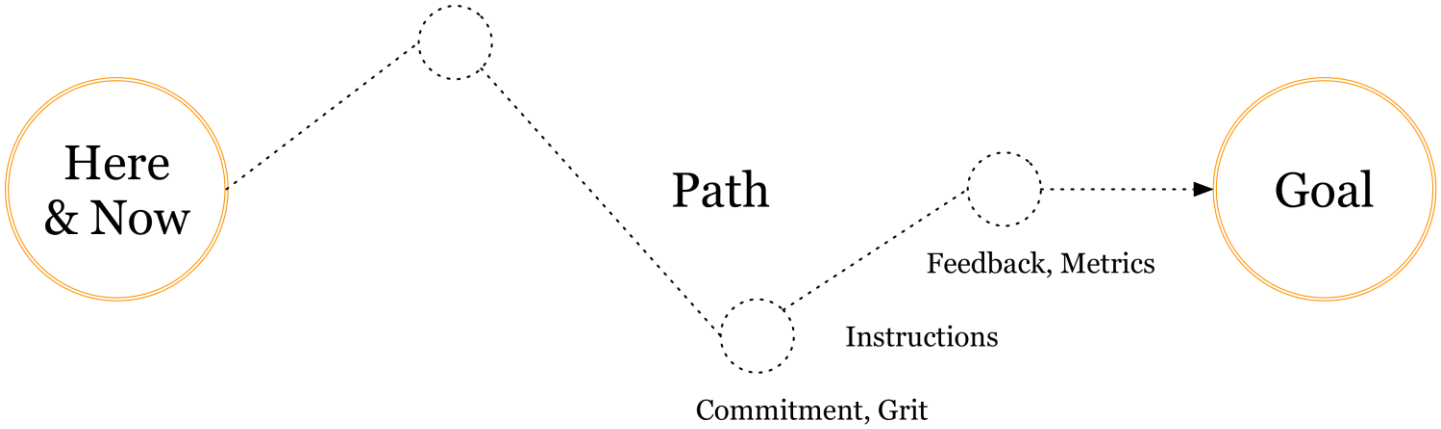


Depth First

Planning Poker

★ Deciding

- What (*committing to and communicating a course of action*)
- Who (*the "decider" / RACI - responsible, accountable, consulted, informed*)

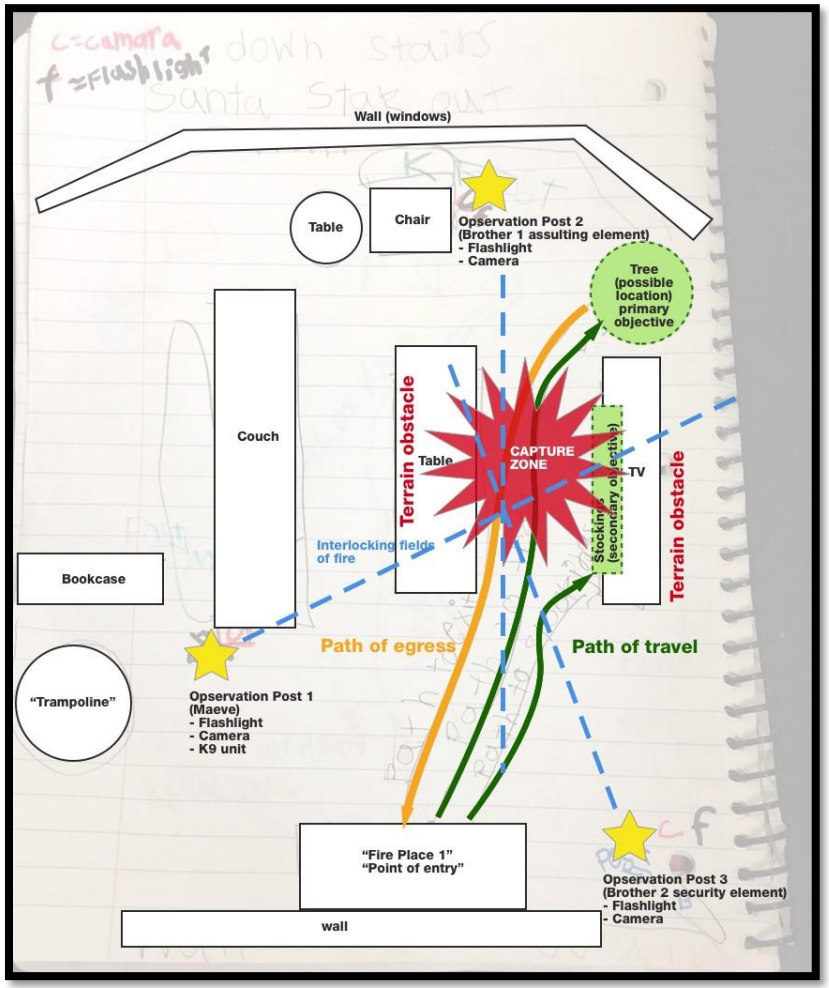


Marines Corp Planning Process

The (COA) course of action graphic and narrative portray how the organization will accomplish the mission.

No more detail than needed; balance guidance + freedom (*commander's intent*).

When writing plans or orders, words matter.



Ambushing Santa Claus

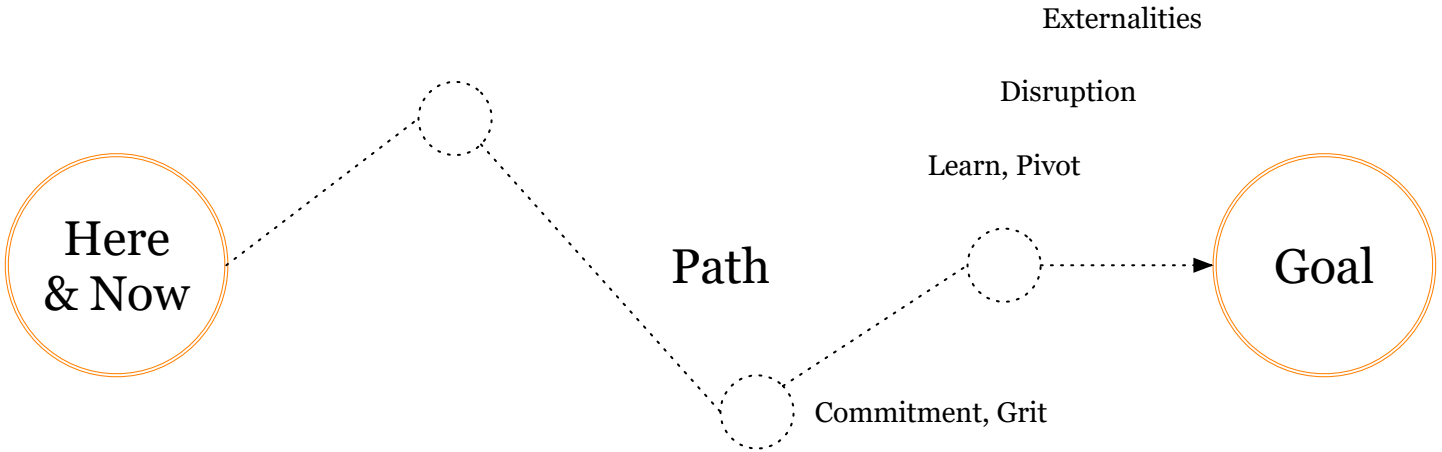
by Trip ODell

Maeve (*10 years old*) documented three potential plans, each included:

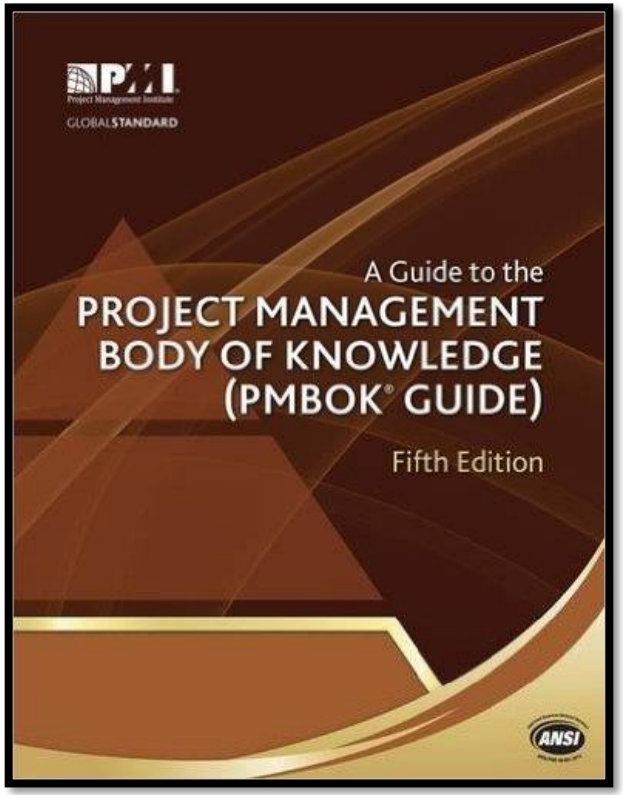
- A map of furniture + features
- Likely "points of entry" by Santa Claus
- Likely paths of travel to/from the tree
- Observation posts (*personnel, tools*)
- Checklists (*equipment, tasks, rations*)

★ Executing

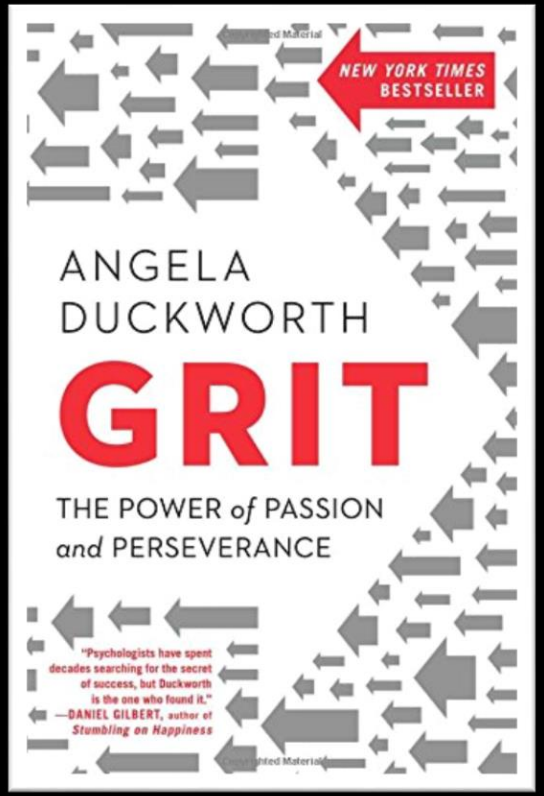
- What (*making, building, traveling, getting things done*)
- How (*systems, tools, feedback, mindfulness, motivation*)



Social | Tangible | Agile | Reflective



Progressive elaboration involves continuously improving and detailing a plan as more detailed and specific information and more accurate estimates become available.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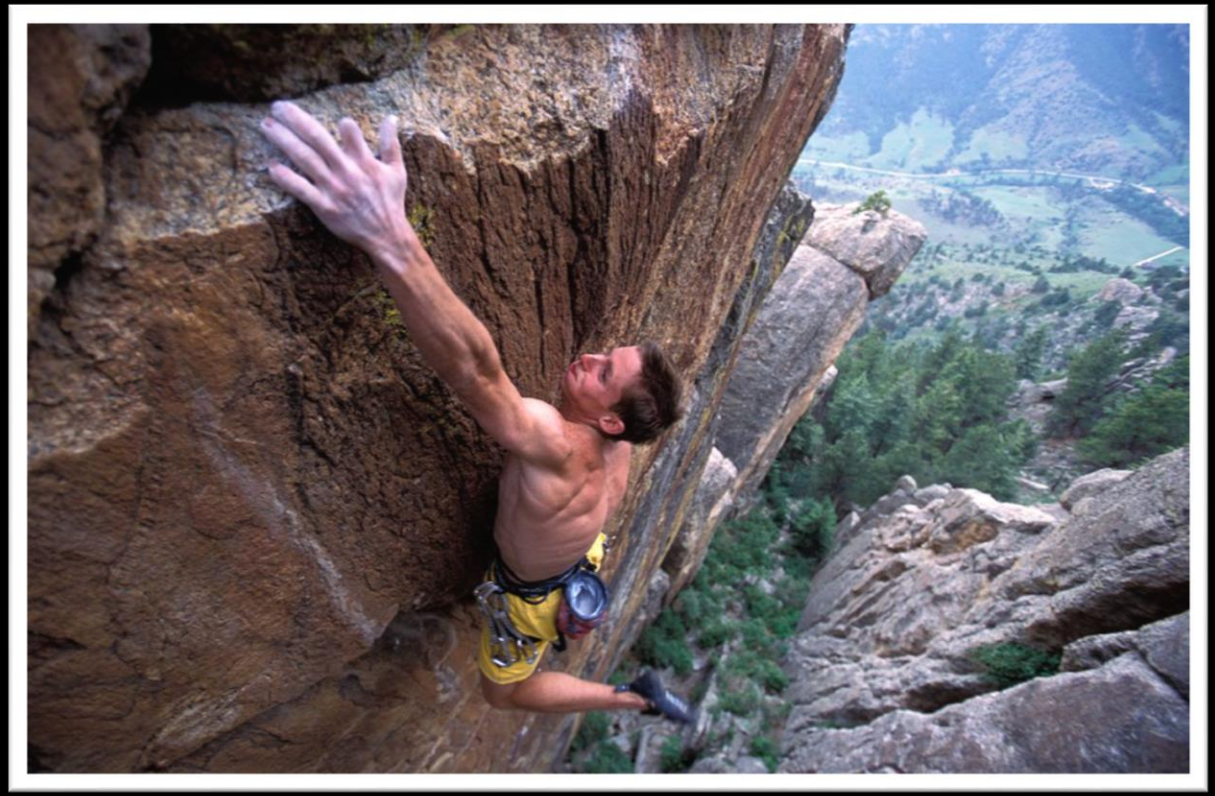
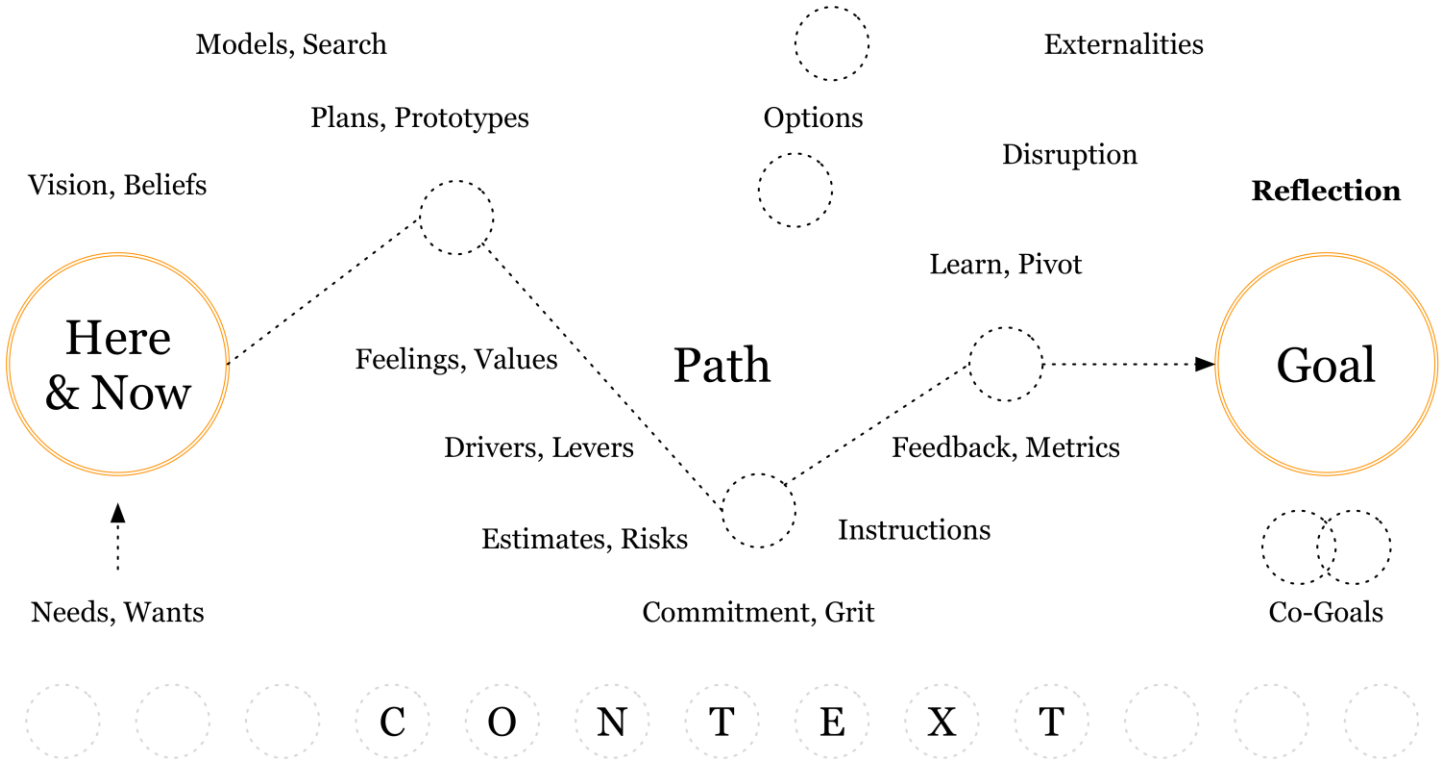
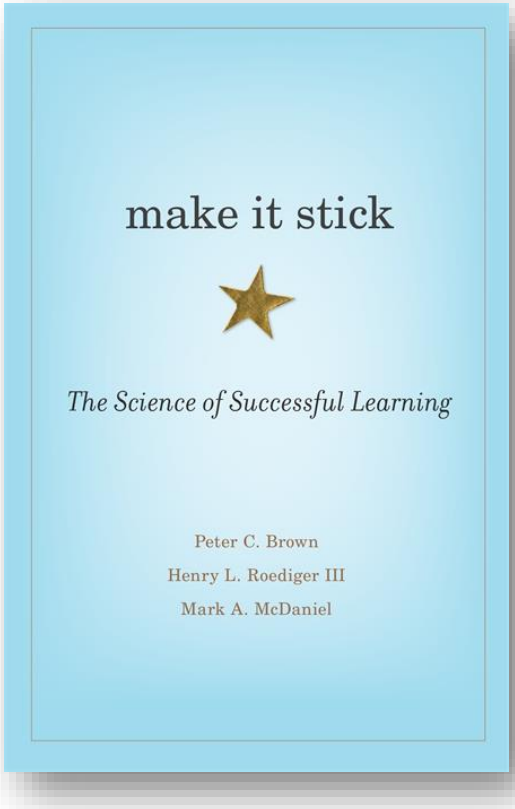
ANGELA DUCKWORTH
GRIT
THE POWER of PASSION and PERSEVERANCE
"Psychologists have spent decades searching for the secret of success, but Duckworth is the one who found it."
—DANIEL GILBERT, author of Stumbling on Happiness



★ Reflecting



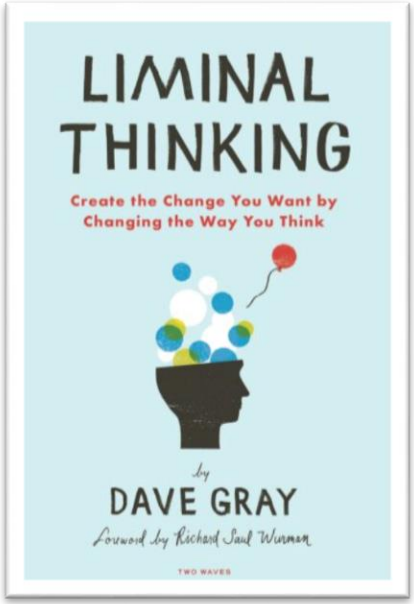
Social | Tangible | Agile | Reflective



To Reflect, Look Back and Within

- what you did, what worked
- how might you do it differently

People who as a matter of habit extract underlying principles or rules from new experiences are more successful learners than those who take their experiences at face value.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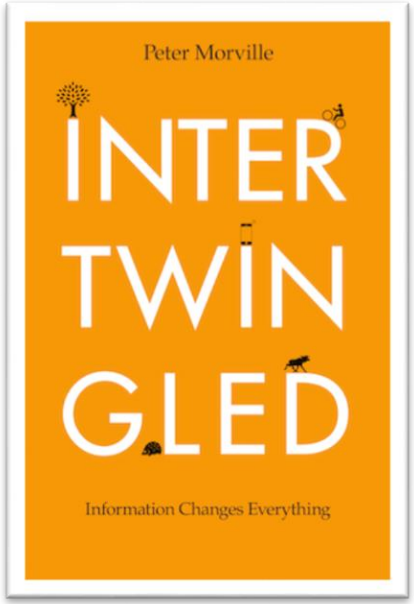
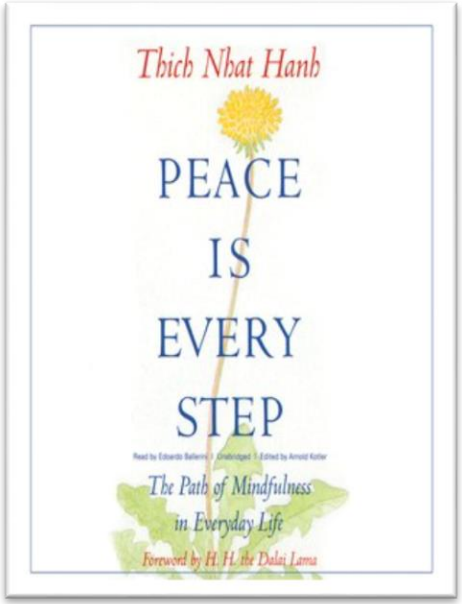
TWO WAVES


Peter Morville
INTER
TWIN
GLED
Information Changes Everything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