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The Enterprise Design Sprints Facilitation Guide

By Richard Banfield

This guide is drawn from the book Enterprise Design Sprints, written by Richard Banfield and published on DesignBetter.Co.

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How This Guide Can Help

Once you've read **Enterprise Design Sprints Handbook** you'll have a good grasp on how to run a successful design sprint. However, between reading the book and doing the sprint, some time will likely pass, making it difficult to remember all the details. This guide is a quick reference facilitators and sponsors can use to brush up, and stay on track.

Pro Tip

The info in this guide is intended to give direction while allowing room to customize your design sprint. Build on the ideas here and experiment with the best way to deliver value to your team and organization.

The Facilitator Role

The ideal candidate for a design-sprint facilitator need not be the stereotypical extrovert that likes to talk in front of room full of people. However, the facilitator should be a good communicator and listener. **His or her primary responsibilities are directing the process, timekeeping and managing group interactions.**

Here are five important notes for facilitators:

1. A facilitator must not allow personal preferences and biases to influence the outcome of the design sprint.

2. The facilitator must understand the challenge and be able to communicate it to team members as well as other stakeholders who get involved.

3. The best facilitators know the process and exercises well, and stick to the basics.

4. Taking rigid responsibility for managing time and processes allows team members to stay focused on creativity, collaboration and keeping an open mind.

5. A good facilitator knows when to provide confidence and support to keep a team on track, and when to stay out of the way.

"

A good facilitator
is more like a
rudder, and less
like an engine.

Ideal Skills of the Facilitator

01
Impartiality and objectivity

02
Expects and creates high-quality interactions and outputs

03
Strong verbal and written communication skills

04
Encourages cooperative interactions

05
Can resolve minor conflicts or overcome bottlenecks

06
More interested in asking questions than giving answers

The Improv Mindset

Good facilitators allow conversations to flow in the same way an improv group builds on one another's ideas. Taking cues from the last person who spoke, a facilitator might add, "Yes, and…" rather than, "But what about…"

Facilitators also set the tone with questions like:

- Tell me more about that?

- How would you build on that idea?

- How would you illustrate that idea in a sketch?

- What feelings were behind that decision?

- What was the outcome you wanted to create with this sketch?

- What personal experiences lead you to this idea?

Pro Tip

I make a point of telling teams numerous times that "additive" questions and comments *(e.g. Yes, and...)* are what we'll use as a group to encourage a high volume of ideas and reduce judgmental thinking.

A Steep Learning Curve

Leading a design sprint gets easier with practice. **After just one design sprint your facilitation skills will improve significantly.** Give yourself permission to experiment with the tasks and don't expect to be a pro right out of the gate.

Pre-Sprint Preparation

Before getting into the nuts and bolts of logistics, you'll want to address three interconnected questions:

1. **What is the challenge you're facing?**

   If needed, revisit **chapter 2** of Enterprise Design Sprints Handbook to better understand how to identify appropriate challenges for a design sprint.

2. **Who needs to be involved for a design sprint to succeed?**

   The Facilitator: If you're reading this guide, it's probably you. But you could also hire a professional design-sprint facilitator. If you do facilitate, you should NOT also be an active participant.

   Product Owner: This is the person at the company with the initial product vision, or the person with ultimate responsibility for the project. Their title is less important than their final decision-making power.

   Note Taker: This person's job is to document the work.

Team members: The rest of the team will be made up of the people needed to get the work done. Revisit the section titled "Who Needs to Be At Your Design Sprint" in **chapter 1** for advice on incorporating subject-matter experts and other part-time participants.

3. **When and where will you be meeting?**

   The best option is to meet in person and off site for five consecutive days. However, **chapter 1** discusses some alternative timeframes you may want to consider. And **chapter 4** provides tips for handling a design sprint with remote participants.

If you can't get full commitment from key people who you need to participate in the design sprint, **postpone the kickoff date**. There's nothing more frustrating and distracting for the group than to have one or two people dropping in and out because of other obligations.

Leadership Buy-In

The popular edict is "ask forgiveness, not permission." But in enterprises there's more to be gained by getting buy-in for your design sprint. By including stakeholders and influencers you'll get the support you need for a more successful design sprint. Revisit **chapter 3**, "Getting Senior Buy-In and Support," for tips and tactics.

Research Requirements

Pre-sprint research is critical for setting expectations and enabling the overall success of a design sprint. To make the most of your sprint, you'll want a general idea of the customer's real pain points.

I recommend:

- Conducting between six and twelve **customer interviews** before the design sprint,

- Collecting and summarizing any qualitative or quantitative data that will provide valuable insights, and

- Spending the time to draft foundational **user journeys and experience maps** before the design sprint.

Pro Tip

I also like to do some basic competitive analysis before a sprint by calling competitors and pretending to be a potential customer. Hearing how they pitch and price their solutions is good insight into how they understand the customer pain points.

Being Prepared For Each Day

This is where the rubber meets the road. Here you'll find useful tips and to-do's for each phase/day of your design sprint.

Phase 1:
Understand

Phase 2:
Diverge

Phase 3:
Converge

Phase 4:
Build

Phase 5:
Test

Phase 1: Understand

Introducing the Design Sprint

To do's:

Give a quick introduction to the process.	Explain what will be done on each day.	Consider playing a **short intro video like this one** by Jake Knapp.

Pro Tip

Never assume everyone has read the pre-sprint emails or notes you provided.

Breaking the Ice

Canned ice breakers are more often awkward than not. I recommend avoiding them. Instead, ask participants what they want to get out of the design sprint and write down the group's goals on the whiteboard.

Staying Focused on the Timetable

First time sprinters often find it difficult to stay on schedule. The facilitator's job is to make it happen for them.

To do's:

Present the agenda numerous times each day.

Reinforce the importance of meeting time limits.

Pro Tip

Use your smartphone's timer to set alarms for each exercise.

Mapping Alignment With Phase Goals

The experience map exercise serves several purposes in phase one:

Charting the customer journey for future reference.

Creating team-alignment on customer needs.

Identifying areas of concern.

Get Snap Happy

First time sprinters often find it difficult to stay on schedule. The facilitator's job is to make it happen for them.

Phase 2: Diverge

Trust The Process

The design sprint process and exercises have been tested by thousands of teams around the world. Even when you're not sure if things are working as intended, push through. You'll be pleasantly surprised at how consistently the process generates the ideas and answers you're looking for.

Expert Input

To do's:

Use your pre-sprint interviews to seed the Diverge conversations.

Read out survey answers or pain-point descriptions.

Encourage participants take the insights and improvise.

It's OK to Cheat A Little

While certain exercises like 8-ups are best done by individual participants in silence, others provide good opportunities for participants to borrow ideas from one another and build on them.

Pro Tip

Encourage participants to look around and take inspiration from the ideas of others.

Sticky Notes

Given the chance, most participants will write their insights, ideas and sketches on regular sheets of paper or in notebooks. This reduces collaboration.

To do's:

Ensure that all ideas are written or drawn on a sticky note (one idea per sticky).

Display sticky notes on appropriate boards.

> **Pro Tip**
>
> The simple act of getting up and walking to the whiteboard with a sticky note creates a more collaborative environment.

Storyboarding

Initially this task might go slower than anticipated. Warm up the team by asking them to do a rough sketch first and then start with the detailed storyboard exercise.

> **Pro Tip**
>
> Plan extra time for participants who find drawing especially challenging.

Phase 3: Converge

Keep Focused on Problems, Not Solutions

When participants share storyboards they often act as if the ideas have already been validated. It's a good idea to remind everyone that these are just untested proposals. A prototype solution is still several steps away.

Voting for Ideas

Choosing one idea over another can get personal. You don't want that.

To do's:

Explain that the decision is based on voting, not a single opinion.

Display voting clearly so everyone can see how it played out.

Lightning Demos

Before voting on ideas, give participants a chance to demo their ideas for the rest of the group. This should feel like a fast-paced pitch competition.

Pro Tip

Use a timer to ensure nobody blows through a 2-3 minute time limit.

Capture All Ideas

The Converge phase is for narrowing down the field of potential solutions to a single idea for prototyping. Inevitably there will be other good ideas worth keeping.

To do:

Create a *parking lot* or *pipeline* where ideas that don't make the cut are preserved for the future.

Phase 4: Build

Recruit Early

Lining up test subjects in advance early makes the Build phase less stressful. This is especially true of projects that need to be tested with senior executives or customers.

To do:

Depending on the team size assign one or two people to recruit test subjects in advance of the Build phase.

Roles For All

Make sure everyone has a clear role to play during the Build phase. If necessary, create printouts for the team roles so there's no confusion.

To do's:

Designers need to create prototypes.

Testers need to develop interview questions.

Recruiters need to organize test subjects and scheduling.

Prototypes Are More Than Screens

In our digital-dominated world it may feel like all prototypes need a digital interface. But our digital devices live in context with physical and emotional experiences that need to be considered.

Pro Tip

Nudge the team to prototype solutions that include interaction or service-experience models. For example, the team can set up role-playing scenarios where they are the service providers and test subjects are the customers.

Conflict Resolution

In every design sprint there will be debate and disagreement. That's good and robust conversation should be encouraged. However, sometimes you may encounter difficulty people who insist on their ideas in spite of what others or research suggest.

Pro Tip

Begin by saying, "That is an excellent perspective, but for now we need to focus on creating an objectively testable prototype. We can come back to your idea when we have more time." If this doesn't work, you may need to be more direct. Generally, it's enough to ask participants to trust the process and put their opinions in the *parking lot*.

Phase 5: Test

Test the Testers

Before running interviews, have participants play both interviewer and interviewee. This will give each team member practice, as well as the empathy needed to better understand how interviewees respond.

Capture and Review

It's easy to get overly focused on interviewing subjects and forget to capture feedback correctly.

To do's:

Make sure note takers and interviewers convene for a few minutes after each interview to discuss the feedback.

Label and upload Screenflow, video and/or audio recordings after each interview.

Patiently Impatient

Staying on task is what allows a design sprint to deliver results in a short amount of time. But gathering quality feedback can take time.

Pro Tip

If test subjects begin to ramble on about their experiences you can redirect them by thanking them and then asking direct questions like, "Thanks for your feedback. Let's table that for now and go back to this specific feature," or "You've given us way more than we anticipated. Can we shift gears and talk about XYZ?"

Practice Makes Perfect

Here's a final tip:

Don't expect your first design sprint to go perfectly.

Rather, know there is always something more to learn and each successive sprint will be easier to conduct within your enterprise. Plus, even if the exercises don't go exactly as planned, you will still gain important insights and answers. Good luck!