Case Study: Working smarter to design meaningful processes
# Design Thinking at Work | National Research Council of Canada (NRC)

Introduction

Within every large organization, there are processes to guide, plan, track, and report on progress against strategic and operational goals and commitments. Sometimes, however, these processes can become overly complicated and no longer meaningful to the end-users. Designing processes that are useful to the user and that allow them to have more time to spend delivering on their core business (research and innovation excellence) are key goals.

In pursuit of these goals, the NRC's Director General for Policy, Strategy & Performance (Christine Jodoin), participated in the Spring2 Innovation Design Thinking Certification Training, determined to address the process challenge NRC Senior Executives put to her - streamlining the NRC planning process and making it useful to the organization's 28 business units.

Despite constraints, such as meeting external planning requirements and timelines which can make implementing a meaningful internal process a challenge, the desire was to engage a peer group of employees across the organization's business lines to collaborate on mapping out an integrated, synchronized planning process that could work for all end-users and stakeholders.

Measures of success included: **Stability** - employees know the cycle and when to expect it; **Usefulness -** the planning process is deemed helpful to the business units for their planning (not just to meet corporate needs); and **Transparency -** plans are shared in a timely fashion to enable alignment of priorities, capabilities, and resources.

Implementation - Applying the Five Stages of Design Thinking
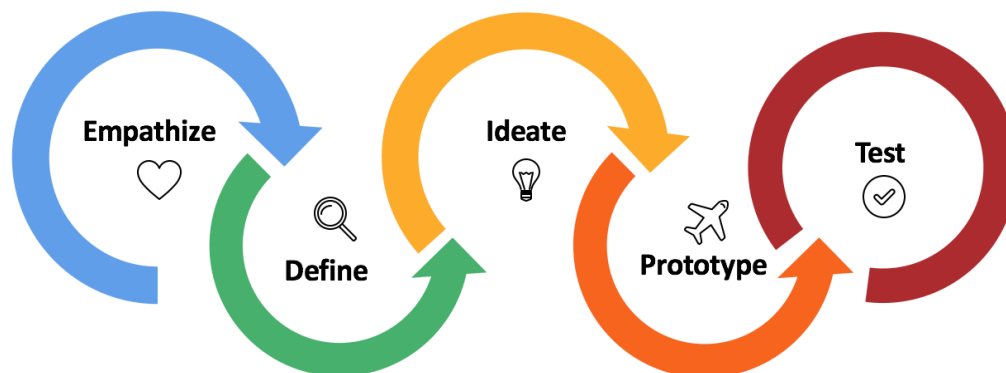
Methodology

Christine and her team implemented the five phases of Design Thinking across five workshops made up of a peer group (25 participants in total) that represented the NRC business lines.

Empathize

During the empathize stage, participants identified five persona groups who are affected in some way by the NRC planning process (Vice Presidents, Business Unit Management Teams, Directors of Operations, Corporate Branches, external stakeholders).

Once the personas were defined, participants generated empathy maps and current and future journey maps for each persona. From here, they identified end-user concerns and pain points, including areas that may be unclear and ensured that all involved - including current and prospective users - agreed on the expectations of the process.

Define

The empathize phase of the workshops helped to reveal the actual challenges that needed to be addressed and the effective elements that should be maintained when developing a new process.

From these findings, a clear problem statement was defined: Have in place a **stable, synchronized, well communicated, and user-centric planning process**. And that **top-down and bottom-up synchronization** takes place between what is required corporately and what is needed between and across business units.

Ideate

Based on the findings from these workshops, participants ideated possible solutions and structures for a new and improved planning process.

During this phase, participants created **mind maps** and completed the **"5-whys"** activity to understand the challenges of the end-users and their causes better, and identified the most impactful ideas to move into prototyping and testing.

Prototype

During the prototype phase, participants designed the following four prototypes:
- **Prototype 1** was a circular shape to demonstrate the flow of all planning activities (direct/indirect), from quarter to quarter on one comprehensive calendar.
- **Prototype 2** was a rectangular shape that provided less information than the former but focused on the core planning activities, and the links between the activities that require integration and synchronization.

- **Prototype 3** involved a text-based planning document that provided detailed instructions for preparing each section of an operational plan, providing room for extensive planning.
- **Prototype 4** was a deck-based planning format, providing concise, focused information to be used as a planning and communication tool with business units staff, management, and executives.

Test

Feedback on all four prototypes was obtained during a 1.5-hour session. The effectiveness of the prototypes was tested using the following criteria:
- Clarity of the proposed integrated planning process to ensure end-users clearly understand when planning activities are taking place and can embed them efficiently and effectively in the management of their business unit.
- Whether the documented planning activities, planning content, and timelines add value to creating a synchronized efficient planning process.

Conclusion

Through the testing phase, it was determined that prototypes 2 and 4 would move forward to implementation.

The testing phase provided Christine's team with areas that needed revision before implementation. Critical feedback was the need to complement the planning process with a Community of Planners representing each business unit at NRC. This was needed to ensure ongoing end-user-feedback, communication, and transfer of knowledge on the planning process and creating an enabling environment for engagement between business units to align plans, priorities, capabilities, and resources. Feedback on the test phase has been positive so far. A post-mortem with the Community of Planners will be taking place on any further iterations of the prototype and testing before deploying a stable planning process across the organization.

To learn how we can help your organization contact us at:
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