



A LEADER'S BOOK DISCUSSION GUIDE TO
“**DESIGN THINKING FOR TRAINING
AND DEVELOPMENT**”

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PERFORMANCE



SECTION 1: GET ACQUAINTED WITH THE CONCEPTS

CHAPTER 1 - A PRIMER ON DESIGN THINKING

In the introduction, we reference Doug Dietz's MRI scanner story. Then, we walk through the steps of design thinking in Chapter 1.

- Listen to **Doug share his story at a TEDx conference**. In his talk, he shares the story of the first time he sees a product he built through the eyes of the ultimate user, a child getting an MRI. The empathy he feels transforms his thinking; he does a great job of telling— and showing— why empathy is the powerful first step in design thinking. Describe how much— or how little— you focus on the learner's thoughts, feelings, and view of a situation as you design solutions for learners.
- Chapter 1 introduces the concept of the “sweet spot” as core to a design thinking approach to problem-solving. In your organization, if you were to represent how much business needs, learner needs, and situational constraints each impact the design of a learning solution, what would that diagram look like? (See page 7 in book). Draw it and share it with each other. Does it have all three circles? Do they overlap? Does one completely dominate the others? How does this impact the solutions you develop?
- What makes it harder/easier in your organization to get the Venn diagram circles to balanced so that they intersect to form the “sweet spot”? If you find yourself persistently describing why you cannot find the sweet spot, discuss how you can empower yourself or your organization to change your solution design approach.
- Share your thoughts from the *Work On Your Own* section (page 14). What product or service did you identify as meeting YOUR needs? How did the developers of that product empathize with you? How did the product consider what you think, feel, see, hear, and do in your world that makes this product perfect for you?



View Doug's TEDx Talk

CHAPTER 2 - LINKING DESIGN THINKING TO LEARNING EXPERIENCES

We talk about the learning journey we are all on within this chapter and organize it across four phases: Prepare to Learn, Acquire Knowledge or Skill, Build Memory and Competence, and Maintain Over Time.

- Share a learning journey you've taken that's resulted in genuine skill-building. Discuss what happened in each phase and how it supported the journey (or made it harder).
- Review the "Let's Get Real" story on page 20. Where have you seen a similar scenario in your workplace? What happened to the initiative associated with your story? Which steps in the learning journey were given the most focus, and which steps were weak or unaccounted for?
- Consider: Are there step(s) of the learning journey you tend to pay less attention to when designing learning experiences? What difference would it make for the learner if more attention was devoted to those steps?

CHAPTER 3 - A DESIGN THINKING FRAMEWORK FOR TRAINING AND DEVELOPMENT

In this chapter we outline a learning experience design framework that marries the typical ADDIE model with design thinking steps.

- Consider this model and compare it to what you do now as you create training solutions. What can you take and use? (See pages 30, 33-40).
- If you opt to use a DIFFERENT model, how can you integrate each of the four principles we outline? (see pages 32-33)
- Review the four principles on p. 33. If you were to adopt just ONE of those principles to follow religiously, which would have the most impact on the work you do for your organization? Discuss how *your* process would change and how the *learner's* experience would change.

SECTION 2: GET PERSPECTIVE AND REFINE THE PROBLEM

CHAPTER 4 - START WITH THE BUSINESS PERSPECTIVE

In this chapter we discuss how to respond to an initial request for training, including how to gather information about the problem, assess stakeholder needs, and agree on a definition of project success.

- Discuss a recent training request you've faced. Draw a stakeholder map for this request and discuss it as a group. How might its use help you ensure you are capturing all relevant perspectives? Who matters "most" in the list of potential stakeholders? How might challenges be different or similar between groups? How might this map help facilitate a "moment of truth" for the requester about whose problem and/or perspective really matters and whose does not?
- The Work on Your Own challenge in this chapter (page 60) encourages you to create a strategy blueprint for a learning solution you created. Do the activity as described and then share your blueprint with the group. Where do you feel you had the information you needed to fill in a section of the map? Where is information lacking? Does the learning solution resolve the challenges you listed on the map? Does it deliver the success criteria you specified? Can you measure its ability to resolve the challenges? If not, how could use of this map with key stakeholders at the START of the project have ensured better clarity on what would be required to solve their challenges? How might it have helped distinguish training challenges from non-training challenges?

CHAPTER 5 - PULL IN THE LEARNER

This chapter discusses tactics and tools that help designers gather the learner perspective.

- Empathy maps, experience maps, and learner personas are three tools borrowed from traditional practice of design thinking/product development. Discuss how and where you see yourself/your team applying each of these tools. How might these tools help you work better with your project sponsors? How might they help deliver better experiences for learners? Where can other, more traditional methods such as interviews and survey data intersect with these tools?
- While none of these methods are time-intensive, we understand feelings of trepidation about trying something new. Discuss the investment vs. reward of collecting learner perspective. What is the risk of making assumptions about the learner perspective? How can you maximize the value of that perspective? (For example, using personas or experience maps for future projects?)

CHAPTER 6 - VERIFY CONSTRAINTS AS YOU GO

This chapter identifies constraints to attend to as you gather stakeholder and learner perspectives.

- Review the list of constraints on page 90. In your world, which ones are cited the most? What stories are you being told (or telling yourself) about why those factors are constraints? The chapter includes numerous questions to ask related to each perceived constraint. Which questions would be most useful in your organization? What other questions would you add to the list?
- Share a time when a constraint that you largely believe was “perceived” rather than real drove the design of a project. In what ways did the constraint inspire creativity? In what ways did the constraint adversely impact effectiveness?

SECTION 3: IDEATE, PROTOTYPE, AND ITERATE

CHAPTER 7 - IDEATE AND PROTOTYPE

This chapter shares how to use ideating and prototyping to brainstorm and design possible solutions.

- Doug Dietz did a **second TEDx talk** in 2017 to show the full process of design thinking. Watch it and talk about the impact ideating and prototyping had on the eventual solution his team developed. In this talk, he goes beyond the process of empathizing (powerful on its own!) to show ways in which his team ideated and prototyped. (The video includes a clear example to illustrate the ways ideation and prototyping can evolve. Skip to 2:45 to see the example, if you don't want to watch the whole video.)
- Imagine you are creating an onboarding experience for new hires that teaches the company's core values: Integrity, Customer-First, and Innovation. You've done insight gathering and created a persona. The persona reveals a top concern: "How do I quickly gain exposure at Company X? I want to be seen as a good fit who will add value quickly." The new hire's perception (feeling) is that Company X is an exciting environment, but it is also extremely competitive. These new hires feel honored to have gained a position in such a prestigious company, and they are excited by their great compensation/benefits package. They are also unnerved by the speed with which they need to gain competence in talking about the company's products and understanding its complex infrastructure. Your job is to consider that information as you think about the optimal way to help new hires get conversant with the company's core values as part of their onboarding experience. Can you come up with four ideas for the core values section? Share one idea you might prototype, including how it honors the learner perspective. What insight would you want to gain from the prototype?



View Doug's TEDx Talk

CHAPTER 8 - REFINE AND DEVELOP

This chapter takes a deeper dive into refinement and development tactics, including UX testing, piloting, and iteration checkpoints.

- Discuss the *Work on your Own* activity on page 133. How, if at all, did you iterate as you developed a recent learning solution? What were the benefits of iterating as you went along? What insight did you gain about improving the relevance or usability of the solution? Or, if you did NOT iterate and get frequent user feedback, how did that hinder your final solution?
- Check out Appendix 9 (pages 243-245). If your success was based on learners' ability to answer "d" or "e" to question 1 (how well do you understand the concepts taught?) and to answer "e" on question 2 (how able are you to put what you learned as part of the program into practice in your work?), how might you execute the development process differently? How many times would you want to iterate before calling a training solution "ready" for use? What information would you want to gather from learners as you developed the solution?

SECTION 4: IMPLEMENT AND EVALUATE

CHAPTER 9 - IMPLEMENT

Here's where things often go awry in companies: the implementation, or "activation" stage. This is usually because of a lack of planning or underestimation of the level of support a program needs to thrive.

- Consider a recent initiative within your company that involved training a large group. What enabled its success or caused its failure or at least limited its success?
- Look at Table 9-1 (page 140) and Table 9-2. Discuss how your implementations have incorporated items in these tables and where they have not. Now, go back to the questions in appendix 9 (pages 243-245). If your salary increase was based on learners' ability to answer "e" (I can be successful now in using what I learned) on question 2 (how able are you to put what you learned as part of the program into practice in your work?), what implementation measures might you put in place? How would you prepare for the possibility of less-than-optimal results?

CHAPTER 10 - EVALUATE

There is an opportunity to reframe the value of evaluation to an organization so that the company sees sufficient value in evaluating programs for effectiveness.

- If training initiatives are intended to solve problems, how does the company intend to determine if/when they are solved?
- Review the Learning-Transfer Evaluation Model (LTEM) in Appendix 11 (pages 248-249). (Reminder: it's pronounced "L-tem") At which level does your organization measure most training interventions? What metrics would provide evidence of Transfer (level 7)? Consider both statistical and anecdotal data. What impact would this information have on your work and the larger organization? Discuss the challenges that prevent you from collecting these metrics and how you might begin to address those obstacles.

SECTION 5: SELL YOUR USE CASE

CHAPTER 11 - GET BUY-IN FOR STAKEHOLDERS

This chapter identifies several objections to the inclusion of learners in the design process and offers tactics to help overcome these objections.

- Review the list of objections to the inclusion of learners in the design process. (See pp 163-164.) Which objections have you encountered?
- Talk about the strategies suggested for overcoming these objections. Which ones have you tried, and what was the outcome? Which ones do you want to try? How might the ability to “show them the money” affect your ability to gain buy-in?
- Review the benefits of design thinking on pages 172-174. Which one would most resonate in your organization, and why?

CHAPTER 12 - USING DESIGN THINKING WHEN A PROJECT IS UNDERWAY

This chapter focuses on ad hoc usage of design thinking tools and practices.

- You’ve got a project underway and you’d like to incorporate a design thinking approach after things are underway. Discuss the idea of a “design blueprint review” as described on pages 179-183. How might that work in your organization and what are the benefits and possible pitfalls?
- Consider the techniques for using design thinking approaches during development (page 184). Which ones resonated with you and why?

CHAPTERS 13 AND 14: CASE STUDIES

The two case studies presented in Chapters 13 and 14 outline two very different scenarios.

- The CAISO story exemplifies using multiple design thinking tools and the impact those tools had on the final product. For those just starting to explore design thinking, could you imagine taking a similar approach?
- The NxStage study was focused on design thinking approaches from its start. For those a bit more experienced with design thinking, how would your approach have been similar and/or different?
- What do you see as the pros and cons of each approach?

RESOURCES

APPENDICES

There are 14 different tools and templates within these appendices. Some of them we reference earlier in this guide, but others we do not. Skim through these and discuss which ones you think might have value for you, or which ones you've already used. Share any success stories or lessons learned if you have used a tool. Finally, if you have used OTHER design thinking tools or techniques, share those as well. Check out the [Luma Institute's online toolkit](https://www.luma-institute.com/products-and-services/luma-workplace)¹. (You will need to register for a free trial to explore their toolkit, but it is a terrific resource.) Choose a tool and talk about how/when you think it could be useful as part of designing a learning experience.



View the Luma Institute Online Toolkit

OTHER RESOURCES TO EXPLORE

If you find yourself loving the topic of design thinking, here are more resources to explore:

- [Interaction Design Foundation](#)
- [Stanford University d.School Starter Kit](#)
- [Design Thinking for Learning Innovation: A Practical Guide by Arun Pradhan](#) (LinkedIn article)
- [Change by Design by Tim Brown](#) (terrific book that explores product design)

We hope you enjoyed working through this book, whether individually or as a team. We'd love to hear your reflections or discuss your reactions. Feel free to post to our Story Board thread on TiER1 Performance's LinkedIn page and tag Sharon Boller and Laura Fletcher.

If you'd like to explore a broader learning and performance strategy at your organization, feel free to reach out to hello@tier1performance.com.



View the Interaction Design Foundation



View the Stanford University d.School Starter Kit



View the Design Thinking for Learning Innovation Article



View Change by Design by Tim Brown

¹ <https://www.luma-institute.com/products-and-services/luma-workplace>

ABOUT THE AUTHORS

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Sharon Boller is a learning design consultant with 30+ years' experience in the field of talent development. She served as CEO of Bottom-Line Performance, Inc., an Indianapolis-based learning design company, for 24 years. During that time, BLP earned numerous "Gold" awards for excellence from Brandon Hall, Horizon Awards, and LTEN awards. In 2019, after growing BLP to 34 people and \$4M+ in revenue, Sharon and her husband/business partner sold the company to TiER1 Performance. After spending 15 months as a Managing Director at TiER1 to ensure a smooth transition for clients and team members, Sharon shifted her status to affiliate consultant in December 2020. The position allows her to maintain a role in leadership development and L&D work while also pursuing social interests and expanding her speaking and writing efforts. Currently, Sharon's primary focus is launching a philanthropic giving circle called Small Things Great, which will focus on increasing the stability of low-income families by decreasing their housing instability. She also speaks and writes on passion topics and areas of expertise, including design thinking for L&D, leadership development, learning games, equity and inclusion in the workplace, and social justice within American communities. Reach out to Sharon at sk.boller@tier1performance.com.

LAURA FLETCHER

Laura Fletcher is a seasoned learning consultant with 15 years' experience in learning and development. As a consultant at Bottom-Line Performance, she served clients by designing and developing award-winning solutions ranging from instructor-led workshops to mobile apps. As a Manager of Instructional Design at BLP, her ID team became something of a design-thinking "incubation lab," experimenting with design thinking techniques and integrating them into the design process. Laura is currently Sr. Program Manager at Salesforce, where she consults with leaders and teams to cultivate advancement and leadership-readiness. She continues to rely on design thinking to ensure programming meets the needs of thousands of diverse, global employees while also delivering value to the business.

WE ACTIVATE YOUR STRATEGIES THROUGH *people*

Strategy is only as valuable as the activation behind it: how it shows up, how work gets done, how your employees own it, and how your customers experience it.

HOW WE *activate* STRATEGY



Consult

Identify and align on performance factors needed for activation.

In addition to driving clarity around the desired future state, we partner to understand how the unique dynamics of your organization (culture, leadership, roles, systems, etc.) intersect and influence each other to create opportunities and overcome barriers for successful strategy activation.



Design

Create the performance experience and everything needed to sustain it.

We deliver the plan and detail needed for your people to be empowered and aligned around your strategy: outlining key training, communication, performance support tools, technology, and associated timelines in a clearly articulated blueprint, journey map, or experience design.



Build

Activate strategy through engaging, results-focused deliverables.

From custom technology to high-volume communication and training, our studio teams of instructional designers, software developers, designers, copywriters, and videographers create engaging deliverables that allow your people to have what they need when they need it—boom, strategy activated.

CUSTOM SOLUTIONS THAT *activate* STRATEGY

Every organization has different strategic priorities—and therefore different needs. We custom-craft the solution that is right for you.

SYSTEMS ADOPTION · DIGITAL TRANSFORMATION · EXPERIENCE DESIGN · CHANGE STRATEGY · ONBOARDING · SALES ENABLEMENT
PERFORMANCE MANAGEMENT · TALENT DEVELOPMENT · CUSTOM PORTALS · CULTURE · CORPORATE COMMUNICATIONS

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