



# EXPERIMENT TOOLKIT

DOL + IDEO

# A LITTLE BACKGROUND



In April 2013, the DOL and IDEO partnered to uncover ways that OneStops, agencies, and their partners could use empathy for job seekers' emotional states to develop and deliver new services. The project culminated in a workshop where participants created concepts designed to better serve job seekers in the five major emotional states: Stalled, Discouraged, Panicked, Wandering, and Elated. Hundreds of ideas bubbled up in that workshop, but it in the months that followed it was clear that there was no framework for how to carry those concepts forward or foster a culture of experimentation.

In January 2014, the DOL and IDEO came together again to define a process for launching quick experiments and rapidly iterating ideas in order to ensure that promising ideas make it into the world despite the resource constraints and regulations faced by OneStops, government agencies, and their partners. A team from IDEO visited several OneStop locations in urban and rural Oregon, tested some simple concepts, and developed the following streamlined framework for how to prototype and scale ideas across OneStops.

## **About IDEO**

IDEO is a global innovation consultancy that uses human-centered design and the design thinking process to develop solutions to some of the world's biggest problems. Put simply, their design thinking approach is a process for redefining problems based on real human needs, developing solutions tailored to those needs, and rapidly testing and iterating solutions by bringing those ideas to life as quickly as possible.

# WHAT IS THIS & HOW DO I USE IT?

Welcome to the Experiment Toolkit. This toolkit includes step-by-step instructions for designing, planning, and running an experiment using the design thinking process, and provides examples of past experiments run inside OneStop career centers.

This toolkit can support any experiment you want to run at your OneStop. All types of experiments are encouraged, though past experience suggests that most experiments will revolve around designing processes and tools in one of the following categories:

<b>SPACE</b>	The physical environment of a OneStop signals how you want job seekers, employers, and staff to feel. How might we adapt the environment to the needs of the people who use its services?
<b>TAILORED SERVICES</b>	One constant across OneStops is high volumes—there are many people to be helped, and limited time to offer. This time crunch can create an experience that feels generic and less helpful to each job seeker. How might we quickly uncover a job seeker’s career desires and the barriers that hold them back? How might we design a welcome experience that is intuitive and actionable for the job seeker and useful diagnostically for the career counselor? How might we help make serving a large population feel personal or customized?
<b>COMMUNITY BUILDING</b>	For many, unemployment is a significant low point in their life. Depending on their circumstances, some job seekers may not have strong connections to support them during their job search and transition into full employment. OneStop staff are often limited in how much they can help job seekers, due to bandwidth and resources. How might we create a sense of community and a strong network of support around those in their journey to employment? How might we help job seekers help each other?

## WHY EXPERIMENT?

Experimentation is simply a process for trying something new and capturing feedback on whether it worked. Introducing a new idea as an experiment allows you to test its viability and let others see what’s possible. It also allows other people—whether it’s colleagues or customers—the chance to codevelop and improve the idea, as well as support its future growth.

## WHAT’S THE PROCESS?

The innovation process helps you and your team approach problem solving in new ways, with a bias toward action. Less talk, more rock. It encourages you to actively seek insights and inspiration, to question your assumptions and rethink existing paradigms, and to try new ideas and learn from your successes and failures in testing those ideas.

*Ready to get started?*



## PART 1:

# IDENTIFY USER & NEED

*Our ultimate goal:*

### PLACE JOB SEEKERS INTO JOBS

There are no generic job seekers and no generic challenges. To design better employment services, we need to start with a specific job seeker or staff member—what we'll call your User. Follow these steps to select your user, outline their needs, and define the problem to solve.

1

## SELECT YOUR USER

Identify and describe the user that you want to serve. Try to focus on someone who faces a particular challenge and describe their goals and what motivates them.

Who are they? What do they seek?

What motivates them?

2

## DESCRIBE THEIR CHALLENGES

Outline the biggest challenges that your user faces. Describe the obstacles that keep them from reaching their goals.

What gets in the way of their success?

What holds them back?

What's surprising about them?

3

## DEFINE THE PROBLEM TO SOLVE

Write a tight How-Might-We (HMW) question to define the problem your user faces. Focus on your user's needs and write your HMW to satisfy those goals and needs, not a specific solution. For example, if John has worked as a laborer and wants to get an office job, we might ask, "HMW translate John's existing skills for his next employer?" NOT "HMW build John a better resumé?" This way, we can cook up ideas that go beyond his resumé layout.

For this user, it would be game changing to...

How might we...

### 💡 HMW TIPS:

**BE HUMAN-CENTERED**  
It should focus on a human need, challenge, or experience.

**NOT TOO BROAD**  
If it's too broad, it's hard for people to know where to begin.

**NOT TOO SPECIFIC**  
If it's too narrow, there's less opportunity for new or innovative ideas.



## CASE STUDY:

# IDENTIFY USER & NEED

## SELECT YOUR USER

There's no right or wrong way to select your user. We started by building off of our previous research: If there are five major emotional states of job seekers, how could we tailor services to job seekers based on their emotions? To do so, we chose to start by focusing on **time-strapped OneStop counselors who want to be emotionally supportive.**

**STALLED**  
Behaviors: take a break, deny procrastinate, feel overwhelmed

**DISCOURAGED**  
Behaviors: withdraw, turn to you, let to friends & family

**PANICKED**  
Behaviors: die for bankruptcy, accept lower job, sell things

**ELATED**  
Behaviors: relax, rest on false hopes

**EXPLORING**  
Behaviors: endlessly apply, explore many directions, do busy work, get pregnant

### Inspiration

Force engagement  
Create plan A/B/C  
Prioritize approach: skill building vs. job searching  
Provide achievable tasks  
Create milestones and concrete deadlines

Initiate contact—and check back later  
Provide relatable examples of similar situations. Story night.  
Communicate the value of acting now  
Provide work assignments—even if unpaid—for focus

Communicate the monetary value of a college education  
Create alumni corps  
Create options to assist others in the job search  
Give a reality check

### Emotional Support

Find new ways to reach those people—they don't come into the job centers  
Connect people to cohorts and support systems. Connect with like associations—e.g. veterans, unions, Blue Collar  
Provide mental health referrals

Share relatable success stories  
Get people to articulate goals  
Guard against toxic  
Structure small successes to build confidence  
Volunteer internship to re-engage in the "working world"

Establish volunteerism: heal through helping others  
Provide a sense of "agency" in the search  
Provide a place to go, dressed like you're going to work  
Build on incubator experience

### Address emergencies

Provide emotional support. Build support networks.  
Provide onsite mental health services  
Initiate job search demands, but remind folks about maintaining unemployment insurance requirements

Connect to social services (rent assistance, homelessness prevention, bankruptcy advisors, car sales programs)  
Provide 2-1-1 type support in the moment  
Switch out the service providers for a fresh approach

Ask people to rate their situation on a pain scale  
Physical activity partner with a ZUM or YOGA  
Provide mentorship

### Channel momentum

Channel energy to next steps forward  
Expand network  
Create short/long term plan  
Test assumptions positively  
Build self-awareness through coaching

Identify potential roadblocks and proactively problem solve them  
Ensure time-sensitive check-ins  
Build employer job clubs

Provide peer support

### Structure and guidance

Create plan A/B/C  
Prioritize approach: skill building vs. job searching  
Create milestones and concrete deadlines  
Give responsibility  
Match job seekers with mentors  
Coach on dreams and realities

Ensure that offerings are truly intensive and robust  
Create affinity groups and cohort activities that resonate  
Help people explore desires and learn about options  
Provide work experience  
Look at application to response

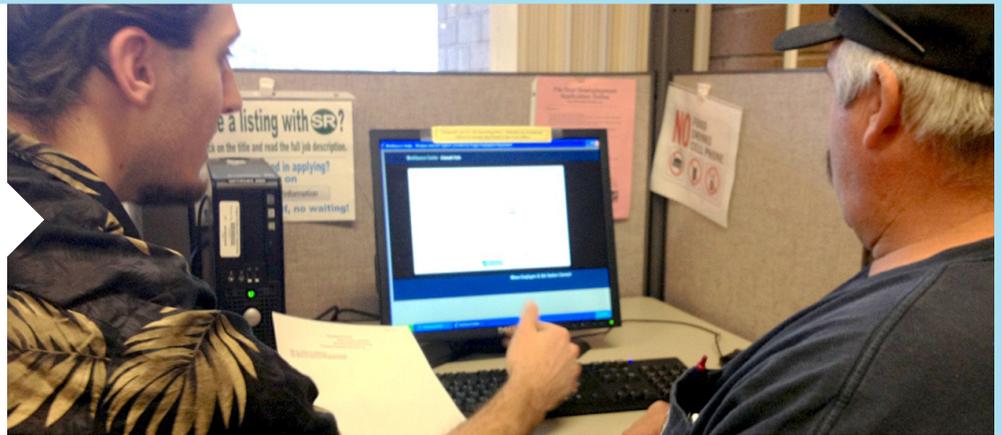
ratio, and discuss how to improve it  
Ask what an ideal job would be  
Host a self-discovery workshop  
Provide mentorship, mentor office hours, "someone like me" mentor volunteers  
Give industry-specific support



- Be self-aware
- Get access to information
- Clarify priorities
- Get a reality check
- Upgrade skills
- Know how to tell your story
- Prepare materials
- Make connections
- Submit focused applications
- Be ready to receive call-backs
- Follow up on leads
- Track real progress

## DESCRIBE THEIR CHALLENGES

We heard that many counselors are pressed for time in meeting with job seekers, and that this pressure sometimes leads them to skip the get-to-know-you conversation that reveals a job seeker's emotional state. **Unfortunately, counselors can't deliver the best guidance without understanding how a job seeker feels and what is holding them back from succeeding in their search.** It is important to uncover this information.



## DEFINE THE PROBLEM TO SOLVE

We were surprised to learn that, although they're incredibly empathetic, counselors often need to skip over rapport-building in trying to serve as many people as possible.

Understanding the emotional state of a job seeker so as to best support them is crucial. **It would be game changing to give career counselors shortcuts to the best kind of help for each job seeker.**

**How might we help one-on-one counselors quickly discover the best way to serve each job seeker?**





## PART 2:

# BRAINSTORM SOLUTIONS

After identifying a user and their needs, it's time to brainstorm a host of potential solutions that could serve them and others in this situation. The goal of brainstorming is to generate as many ideas as possible to later test out in prototype form. It's a time of divergent thoughts, wild ideas, and pushing the edges of what's possible.

## 1 SELECT BRAINSTORMERS

Make a team! Gather 5-10 colleagues together for a brainstorm session. Aim for a diverse group by seeking out people who are outside of your core discipline or role, as this will invite fresh perspectives. In some cases, it's useful to have those who you are designing for in the session with you, as they have firsthand experience with the challenge you are tackling.

## 2 SET UP THE SPACE

Set aside a chunk of time (ideally 15-30 minutes for each HMW statement) for a brainstorm session. Brainstorming is scrappy—the only supplies you'll need for the session are pens and paper or post-it notes. Heart rates are higher and people are more engaged when they're standing, so try to clear a wall space that the brainstormers can gather around.

## 3 BRAINSTORM (KEEPING THE RULES IN MIND)

Use your HMW statement as a prompt to think up a range of ideas, from the big, grandiose ideas that might seem far off to the small actions that could be taken tomorrow. Brainstorming should feel quick. Spend the brainstorm session rapidly writing, sketching, and verbalizing your ideas. Ideas should be shared one at a time to the whole group.

Who will you invite?  
What are their backgrounds?

Where will you stage the brainstorm?  
What supplies will you need?  
How will you get people up and engaged?

### Follow the Brainstorming Rules:

1. **Defer judgment** Judgment comes later. Right now, there are no bad ideas!
2. **Encourage wild ideas** You can make a wild idea reasonable, but you can't make a reasonable idea wild.
3. **Build on the ideas of others** Think 'yes, and' rather than 'no, but.'
4. **Stay focused on the topic** You get better quality output if there is focused effort.
5. **One conversation at a time** That way all ideas can be heard and built upon.
6. **Be visual** Try to engage both the left and right sides of the brain.
7. **Go for quantity** Set an outrageous goal and surpass it!

### 💡 QUICK TIP:

Talk with other staff about their 'half-baked' ideas—things that they believe would help them do their jobs better than they've been mulling on. Chances are they've always wanted to try it out, or experiment with something new, and have never had the chance. Their ideas can seed the brainstorm, and perhaps build in a support structure for a future experiment.

### 💡 QUICK TIPS:

Release your mind from current job constraints or frustrations and let your imagination run wild! The biggest thing holding you back from having a lot of ideas is the voice in your head saying, "that won't work."

Keep it to one idea per piece of paper or post-it note. That way, you'll be able to shuffle the ideas during the clustering and selection process.



## CASE STUDY:

# BRAINSTORM SOLUTIONS

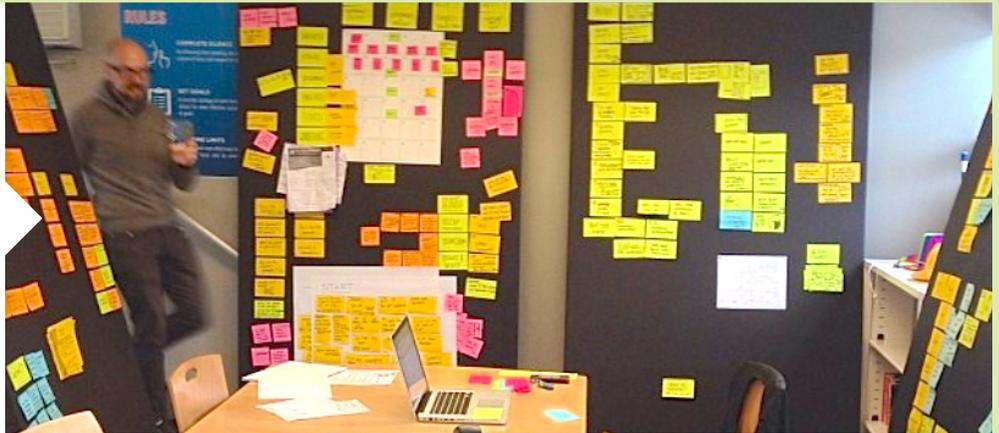
## SELECT BRAINSTORMERS

We found that bringing together people from throughout the OneStops—from front desk greeters to career counselors to managers—into the same room proved enormously helpful in developing more and better ideas. For our brainstorm, we looped in people with backgrounds in education, finance, anthropology, and HR to get a new perspective on the challenge and to drive our thinking further.



## SET UP THE SPACE

We hosted our brainstorm with 5-8 people clustered around tall 4' x 8' foam-core boards. Each HMW statement was written out on a post-it and stuck on the boards where anyone could see them. Team members then gathered in a semicircle around the board and pinned up their ideas one at a time.



## BRAINSTORM (KEEPING THE RULES IN MIND)

Deeply enmeshed in the operations at OneStops, staff are often confronted with challenging situations and structures. We found that many are aware of the constraints they currently work around, but feel that there's no wiggle room to make adjustments. Others have imagined improvements that could be made.

We asked a diverse set of staff what their current highlights and frustrations with their job were, and found many opportunities for change—from redesigning the layout of the welcome area, to decreasing the number of forms filled out or steps taken during orientation, to increasing the amount and type of resources for the computer illiterate population. These ideas were used as fodder for our brainstorm.





## PART 3:

# CLUSTER & SELECT

In brainstorming, we focus all of our energy on creating ideas. In selection, we focus on sorting our ideas, picking the best ones, and refining or combining them into concepts that we can prototype and test.

1

## CLUSTER YOUR IDEAS

Gather similar ideas into broad categories (e.g. ideas related to furniture, services, or tools), then cluster together all of the little ideas that could be part of one big idea (e.g. furniture and seating arrangements that encourage peer-to-peer support). Think of this like prospecting for gold—first you sort the gold from the grit, then you melt the nuggets down into bars and ingots.

2

## DEFINE SELECTION CRITERIA

To be worth the effort, what does a good idea have to achieve? Criteria could be anything relevant to your context or that constrain your ability to experiment: the ability to be built fast, being visual and tangible, using existing resources, having no need for a user manual, being easy to tweak quickly, or being highly portable. If you have a difficult time selecting, you can even score your ideas against your criteria, like Olympic judges.

What categories do you see?

What really big ideas or themes have begun to emerge?

Make a list of the conditions or criteria that will make the best concept.



## CASE STUDY:

# CLUSTER & SELECT

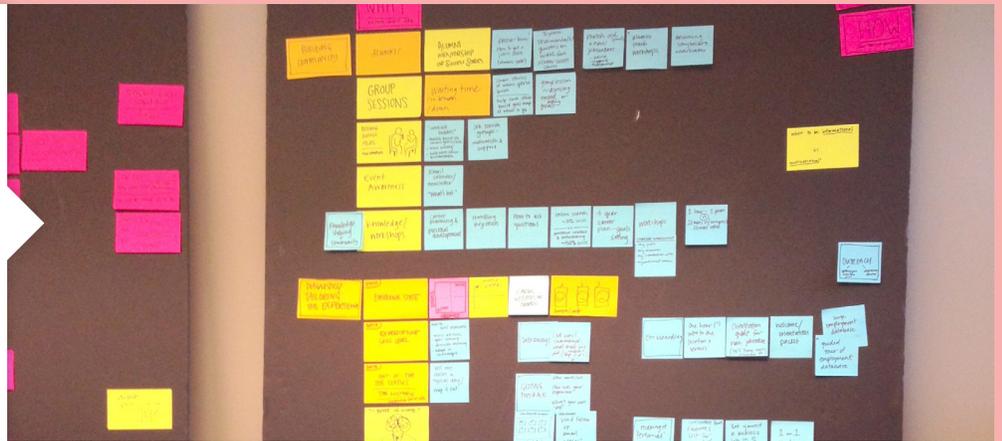
## CLUSTER YOUR IDEAS

We went through several rounds of brainstorming. After each session, we pulled out our favorite ideas and grouped them into a few key categories:

**Spaces:** ideas to transform the OneStop's environment

**Community:** ideas to create more peer-to-peer support among job seekers

**Tailored Services:** ideas to better diagnose and treat job seekers based on their needs.



## DEFINE SELECTION CRITERIA

One idea was to tailor services to job seekers by having them select the kind of support that they need. We gave one-on-one counselors flashcards, called Hero Cards, with different counseling personalities on them (e.g. coach, friend, superhero), and let job seekers read through the cards, choose a style of support that best suited them, and then discuss with the counselor what kind of support they preferred. Our hope was to

quickly uncover the kind of support each job seeker needed. We knew we only had one week to test concepts in Oregon, so we were able to pull out a very tight set of criteria for the concepts we would build and test. Ideas (like the Hero Cards) needed to be highly visual, able to be delivered by anyone, and easy to either transport to Oregon or produce on the ground. This filter helped us eliminate ideas that just didn't fit.





## PART 4:

# SKETCH & GUTCHECK

You've selected a promising idea. Now, you need to bring it to life. By sketching your idea, you can begin to think through all of the elements needed to make it real. Once you have a sketch—your first prototype—you can get some very quick feedback before investing any more time on the concept.

1

### SKETCH IT OUT

Begin to visualize your selected idea by drawing out what it might look like. Don't worry—stick figures and boxes are fine! The goal is to draw out every element of the idea in order to help you think through how you would put the concept into practice. Create multiple drafts of the same idea to see how it might start to come to life in different ways.

[Sketch something here or grab a blank sheet of paper.]

2

### IDENTIFY ASSETS NEEDED

Now that you've sketched out the idea, make a list of all the assets that you need to buy, borrow, or create to bring your idea to life.

What kind of materials do you need? Where will the prototype live?

3

### GET A GUTCHECK

Select a few people who may be impacted by your idea and share your sketches with them. Seek feedback on what works, what doesn't, and why. How would they use it? What might go wrong? What risks might you face? How would they make it better?

Capture their feedback.

#### 💡 QUICK TIP:

Enlist people who are already trying to fix things to participate in your experiment. Once you've shown that your idea does lead to improvement, then test the idea with those who are more skeptical.

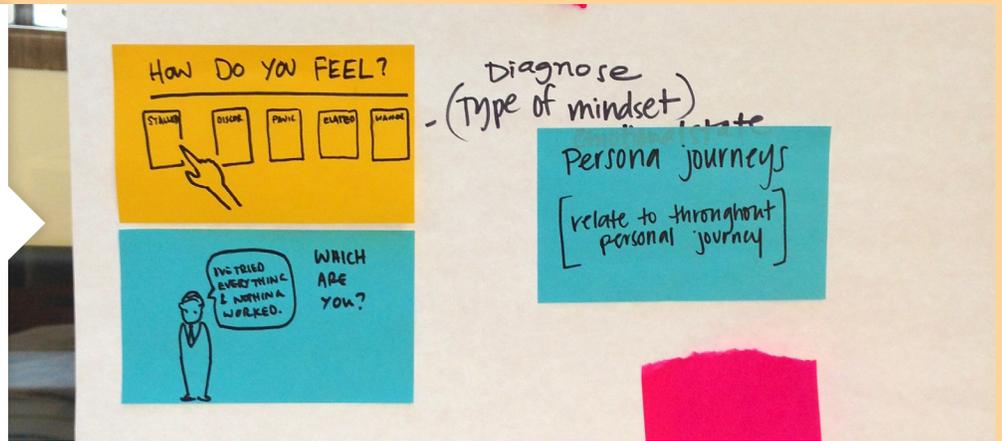


## CASE STUDY:

# SKETCH & GUTCHECK

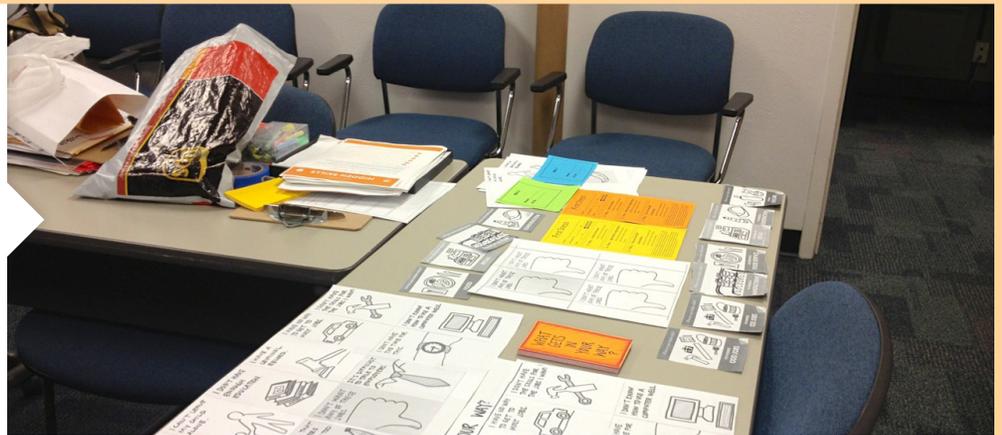
## SKETCH IT OUT

For our Hero Cards, we started by drawing each card on a post-it note. We tried to think of every kind of role a counselor might play. Friend, Grandma, Superhero, Paramedic, etc. We drew up as many as we could imagine, and then began to sketch out how we might use them. What does the conversation look like? How are the cards introduced? How does a meeting change when a job seeker selects one card over another?



## IDENTIFY ASSETS NEEDED

We began very simply by drawing up the cards using black pens and post-it notes. We thought through how many would be helpful and not redundant in conversation, and then figured out how many pages we would need to print. We wanted to be able to measure job seeker and counselor reactions to the cards, so we needed to build some type of feedback form.



## GET A GUTCHECK

We edited down to just six Hero Cards: Superhero, Grandmother, Friend, Cheerleader, Coach, and Paramedic, and shared them with managers at Oregon state government and counselors at several OneStop locations. We learned that, although the concept was promising, the cartoons felt too saccharine and seemed to make light of the situation. We were on the right track, but needed to revise our sketches before we took them live with job seekers.





## PART 5:

# PROTOTYPE & TEST

Now that you've gained some feedback, you can dive into prototyping. Prototyping is an easy and rough way to convey an idea quickly and with minimal investment. The best prototype answers a single question or a single assumption lying behind your best idea: Does this interaction have the intended effect? Do job seekers feel more comfortable? Does this accelerate job placement? By putting your ideas out there and getting feedback, you can quickly identify areas that could use further refinement. Focus on making it real, not necessarily making it perfect.

### 1 REFINE YOUR IDEA

Once you've gained feedback from colleagues and users, you'll have learned whether there are any glaring problems with your idea. Based on their feedback, refine your idea.

How is the idea flawed?  
How should the concept evolve?

### 2 GET YOUR HANDS DIRTY

You've already heard some reactions, you've tweaked your ideas—now it's time to start building! What do you need to put your ideas into practice? Build out the assets you described when sketching your idea—focus on building just enough so that you can measure whether you're on the right track. Try to create an experience that people can react to, not just an image or process to comment on.

What are you going to measure and how will you do it?  
How will you know whether you've succeeded?  
What's the scrappiest possible version of your idea?

### 3 SEEK FEEDBACK

Ask the people that come into contact with your prototype what they think. How does it make them feel? What works and what doesn't? What questions do they have? What is unclear or uncomfortable? Was it better or worse than normal? What suggestions do they have to improve your prototype?

Capture the major points of feedback.

#### 💡 QUICK TIP:

When you're testing your prototype with users, make sure to get their reactions to the experience and not just the idea. Show, don't sell: You don't want to say anything along the lines of "We have the great idea, you're going to love it," or "We have an idea we've been working really hard on," because that will sometimes lead them to give you false enthusiasm for a bad idea.



## CASE STUDY:

# PROTOTYPE & TEST

## REFINE YOUR IDEA

We heard that we had too many Hero Cards and that they felt too whimsical for use with job seekers. Incorporating that feedback, we revised the cards to use icons (instead of drawings) that were deemed more professional. We also eliminated The Paramedic because of too much overlap with The Superhero.



## GET YOUR HANDS DIRTY

For the Hero Cards, this step was a cinch, all we needed to do was print our cards, cut them out, and put them into practice. We introduced them to a group of one-on-one counselors and asked them to use them in conversations however they saw fit. We wanted to learn whether they helped, how they made job seekers feel, how they made counselors feel, and what their greatest strengths and weaknesses were.

To measure these qualitative elements, we drafted a simple feedback form and issued one to every counselor we drafted into the experiment. (If we had a longer project, it would have been ideal to compare experimental counseling session times or job-placement rates to see if our experiment also impacted core metrics.)



## SEEK FEEDBACK

We quickly learned that, especially for seasoned counselors, uncovering the kind of coaching that job seekers needed was a process that they had already internalized. The cards didn't help. When we pushed deeper on what their biggest challenges were, we learned that it wasn't about giving job seekers the kind of help that they wanted, it was about uncovering the barriers that prevent job seekers from succeeding in their searches.





## PART 6:

# ITERATE & SCALE

When you test (and re-test) an idea, you get insight and direction on how to perfect it. Once you gather that information, you need to share it far and wide by inviting collaborators to continue pushing the idea forward and to create far flung impact.

1

### REFINE

Go back to your prototype and modify it based on the feedback you've gathered. Do you need to modify your idea? Do you need to re-scope the problem you're trying to solve? Do you need to talk to more people? Are there any new ideas that emerged as a result of talking to users? Even though you may have been inspired by one user, your ultimate solution should benefit as many people as possible.

2

### RE-RELEASE

Test the refined idea with your users and seek another round of feedback.

3

### SHARE WHAT WORKS

Spreading an idea is just as important as hatching an idea. When thinking about rolling out a new idea, there's understandably a wish to get buy-in from employees or customers. We believe that ideas spread best when the people they're shared with either participate in building it or actively seek out the tool or service.

Now that you have some feedback, what do you still need to do?

What worked better this time?  
What still feels like it's missing?  
Are you seeing the impact you want?

Make a list of people who might be able to help your idea grow or change. Who serves similar users and might benefit from your idea?

#### 💡 SCALING TIPS:

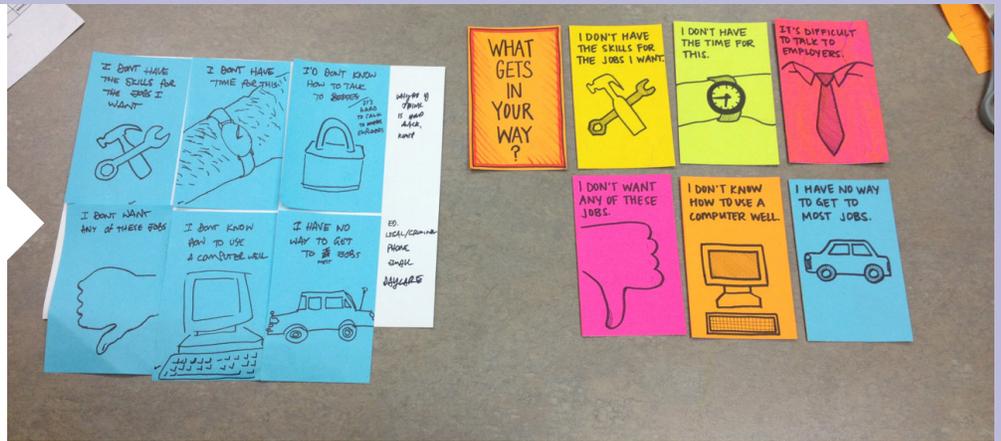
Come up with some simple measures or metrics that show others how the idea is working. This could be quantitative—the number of times the exercise is used by career counselors—or qualitative—customers recounting their positive experience using your improved service. Extend the team by empowering a few passionate people to act as local 'experimenters.'



# CASE STUDY: ITERATE & SCALE

## REFINE

Counselors need help identifying barriers, not selecting the right service persona. So, we went back to the drawing board and created some cards highlighting the most common barriers to getting a job (education, childcare, computer skills, etc). When we tested these with a few counselors, we learned that cards still didn't feel right because they break the rapport that counselors are building with a conversation. But when we translated the Barrier cards into a group exercise, we hit paydirt!

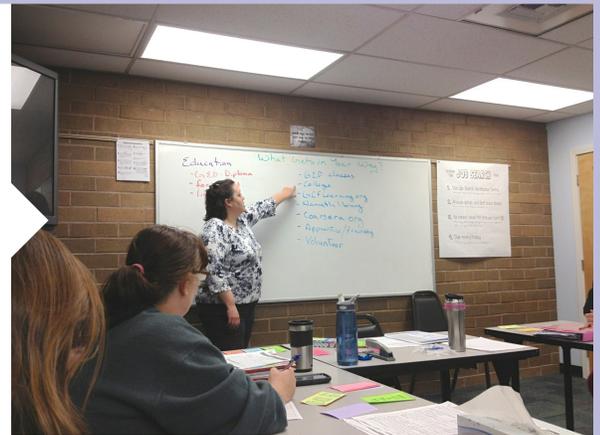


## RE-RELEASE

One counselor, Ellen, in Klamath Falls ran a workshop where she had participants select from a deck of cards the biggest barriers that are holding them back. Participants then sorted their barriers in order of difficulty. Ellen then asked a volunteer to share one barrier, and the entire room went through an exercise of listing all the things that contributed to that barrier and all of the possible solutions that she could use to overcome that barrier.

The entire group united to help each other out, and it gave participants the feeling that they can both overcome their challenges and that they're not alone.

We couldn't have planned it better—job seekers were able to self-diagnose their problems, find quick solutions, and leave the OneStop feeling both optimistic and supported.



## SHARE WHAT WORKS

This toolkit serves as our sharing & scaling. But, if we were to try to scale the Barriers exercise, we'd start first by reaching out to colleagues in other OneStops to help us refine this concept and make it even better.

People often react negatively to concept evangelists, but they love to share their opinions. One of the best ways to make an idea spread is to seek out others who

can help the idea grow and adapt to other environments. Invite others to join you in making the idea more relevant and useful. The Barriers exercise was successful in a rural environment like Klamath Falls, but might need to be adapted to serve an urban environment like Salem or Portland.



# COMMITMENT

## WHAT CAN YOU DO NEXT?

It's one thing to learn a process or to try something out in a workshop, but the real work happens back at work. What can you commit to with regards to either launching a real experiment with real users or to fostering experimentation within the teams that you manage?

### 1 LAUNCHING AN EXPERIMENT

I commit to launching an experiment for \_\_\_\_\_  
[USER]  
to create \_\_\_\_\_  
[OUTCOME]

What resources will you need? \_\_\_\_\_

How long will you spend designing, planning, and running the experiment? \_\_\_\_\_

Who will you need to involve in each phase?

USER IDENTIFICATION / PROBLEM DEFINITION \_\_\_\_\_

BRAINSTORMING \_\_\_\_\_

SELECTION \_\_\_\_\_

SKETCHING \_\_\_\_\_

PROTOTYPING \_\_\_\_\_

REFINING & SCALING \_\_\_\_\_

How will you measure success? \_\_\_\_\_

Outside of your team, who can you connect with to share this work?

\_\_\_\_\_

### 2 FOSTERING EXPERIMENTATION

I commit to fostering experimentation in \_\_\_\_\_  
[TEAM]  
to create \_\_\_\_\_  
[OUTCOME] for \_\_\_\_\_  
[USER]

How much time and space will you clear for the team? \_\_\_\_\_

How often will you check in or re-group? \_\_\_\_\_

What types of questions will you ask in each phase of their experiments?

USER IDENTIFICATION / PROBLEM DEFINITION \_\_\_\_\_

BRAINSTORMING \_\_\_\_\_

SELECTION \_\_\_\_\_

SKETCHING \_\_\_\_\_

PROTOTYPING \_\_\_\_\_

REFINING & SCALING \_\_\_\_\_

How will you measure success? \_\_\_\_\_

What efforts or attitudes will you reward, and how will you encourage creative behavior?

\_\_\_\_\_

# NOTES

# NOTES

