Design Thinking and BCM

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A little history.....

Business Continuity and Disaster Recovery planning – early days

- Business unit recovery plans – **highly detailed manual procedures** and paper forms stored in offsite 'vital records boxes'.
- No tools – plans in Microsoft office and spreadsheets
- Delays in getting to recovery sites – own or vendor locations had to have PCs config'd to support users, phone line redirects etc.
- 'Bums in seats' – careful count of how many work-area workstations needed – multiple shifts perhaps.
- Communications – call trees, pre-defined scripts for press releases, corporate communications
- DR challenges – recovery from tape – delays getting media, time for vendors to set up and declaration, dependent on multiple external sources.

Strategies were based on RTOs and RPOs – as was appropriate, but they were based on what you could achieve, not necessarily what you really needed for the whole business.

Flash forward.....

Business Continuity and Disaster Recovery planning – current days

- Business unit recovery plans – some are so 'lightweight' there's no real content left – assumption is 'we do nothing until we get reconnected to our IT'
- Tools everywhere – BIA is done in a tool, plans are done in a tool, is recovery done by a tool?
- Often no recovery site – recovery in the Cloud, business users work from home, VOIP is highly available.
- Minimal use of work-area recovery – supported by modern strategies and technology capabilities.
- Communications – sophisticated offerings from vendors, high reliance on individuals using their cellphones to make specific calls
- DR challenges – more sophisticated and complex systems, multi-cloud, containers – high need for orchestration and automation.

Still many opportunities to fine tune recovery strategies and optimize the technology we have at hand for an overall better resiliency experience.

Design Thinking

A new way to approach your BCM and DR strategies based on user outcomes

Diverse empowered teams and restless reinvention bring new light on old requirements

Innovation to support BCM planning

Have you heard of Design Thinking?

Have you ever participated in a Design Thinking workshop?

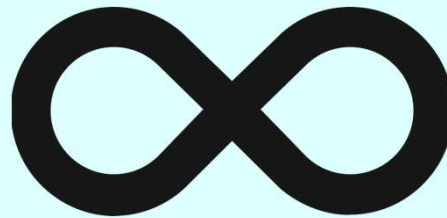# How can Design Thinking change the way we work?

User-centred design – which means a person or group of people who use a product or service and understanding their hopes, desires, challenges and needs.

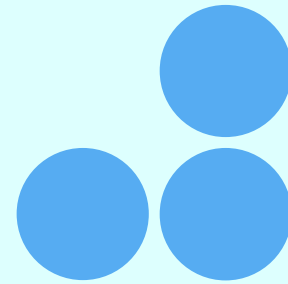Understanding the real problem – rather than searching for a solution

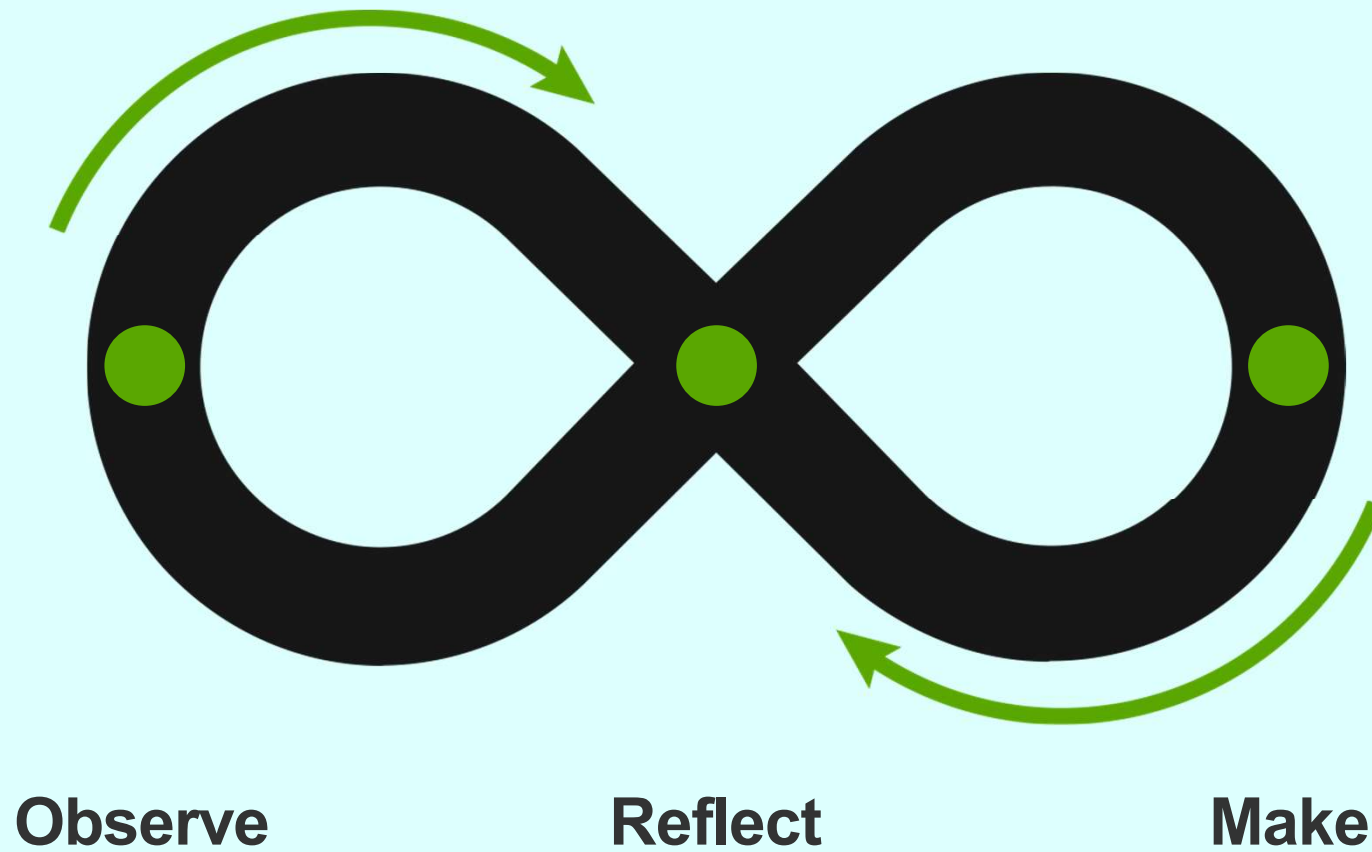# Three Principles of Design Thinking
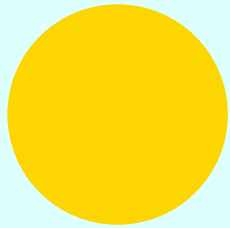
A focus on user outcomes

Restless reinvention

Diverse, empowered teams

The Loop

Observe   Reflect   Make

Design Thinking

Need to get up & actively collaborate using a toolkit of structured methods.

Remember, if you're sitting down, this is just another meeting!

So, how does this actually happen?

- Create a draft "how might we" statements (2-3)
- Identify key users related to each "how might we" statement to invite to the workshop
- Identify 5-7 people per "how might we" statement to be assigned to that workgroup
- Everyone participates, nobody watches
- Teams need to be able to be working in a creative, collaborative, casual space – dress comfortably and be prepared to roll up your sleeves to get to work

Sample Design Thinking Workshop Approach

1. Draft "How might we" statements (2-3)

2. Attendees: Identify key users related to each 'How might we' statement to invite to the workshop

3. Teams: Identify 5-7 people (your team, key people from other parts of the business, trusted partners/advisors) per 'How might we' statement to be assigned to that workgroup. Everyone participates, nobody watches.

4. Workshop Logistics:
   Duration
   - 1 to 2 Day workshop: 9:00am - 4:00pm – generally a full day

   Workshop location requirements [somewhere people can't just 'pop back to their desks']
   - Room for approximately ~20 people.
   - Walls and/or Windows to post large easel sheets for design activities
   - Lots of standing room around the walls and windows. Users will be standing for all the activities
   - Tables – 1 per team to use for the storyboard activity
   - Projector for the Design Thinking education
   - Supplies – post it notes – lots of them, sharpies

Have you taken any
Design Thinking training?

How might we...

Automate and provide the right support to our business recovery teams so that they are able to successfully execute a recovery exercise without impacting day-to-day business?

Recover from an outage and manage any associated incidents to our business recovery teams so that customers do not lose confidence in the safety of their data?

Design a better way for a customer-facing business unit to have their unique resiliency requirements supported without having to ever having to 'go out on their own' for recovery

Design Thinking Workshop Activities

'How Might We' Statement
Problem(s) to address

How might we enable our BCM team successfully execute a focused DR test without impacting the business, so that we're viewed as a strategic partner within the organization?
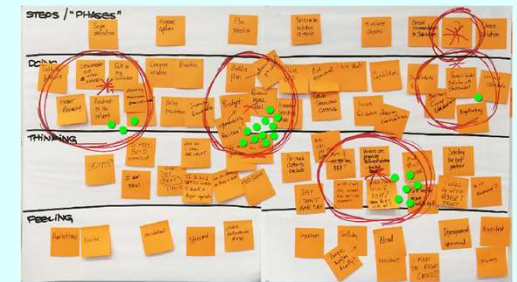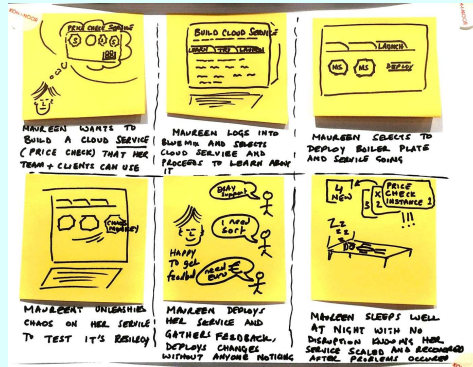
Stakeholder Map
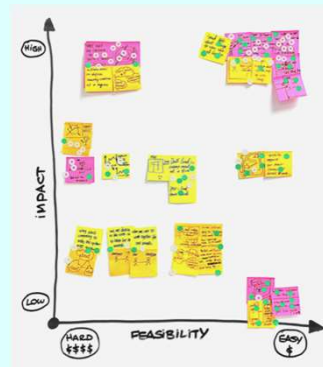Identify Key Personas
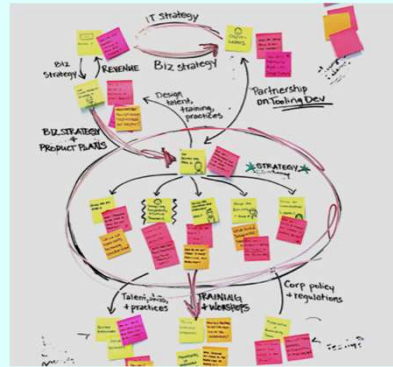
Understanding Personas
Empathy maps

As-is Scenarios
Pain point identification

Ideation
Generate Big Ideas

Idea Prioritization
Impact vs Feasibility

Storyboarding
Future Scenario Modeling

Igniting Growth - A Design Thinking journey to understanding the user needs

Hill
Wow statement

To-be Scenario
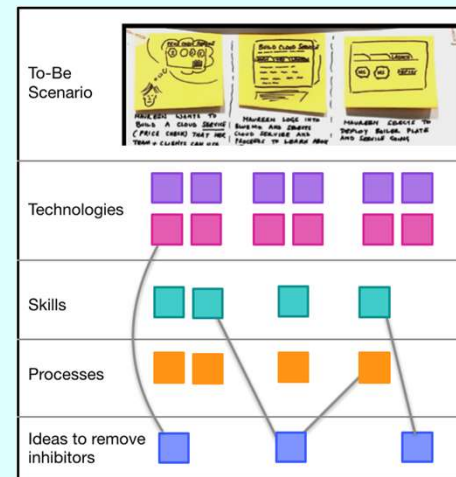Shaping the new user experience

Mapping: Tech, Skills, Process to User Experience
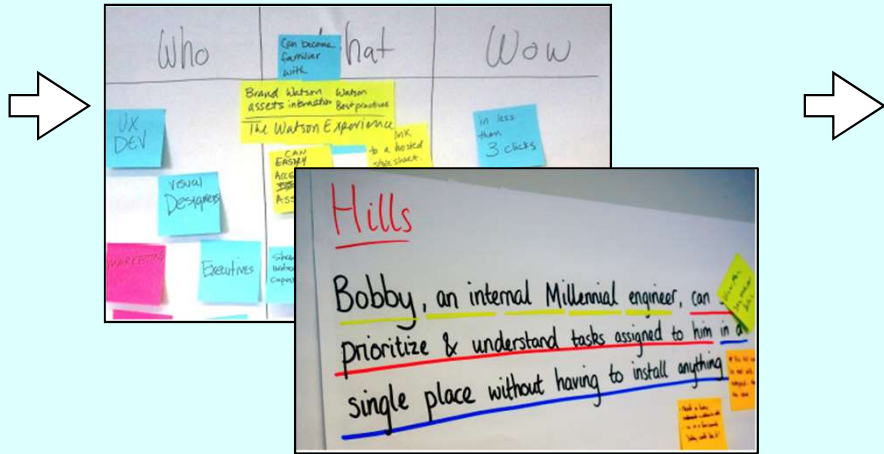

Next steps

Igniting Growth - A Design Thinking Workshop
Design Thinking journey to understanding the user needs

Hill
Wow statement

To-be Scenario
Shaping the new user experience

Next steps: 30, 60, 90 day plans

30 days	60 days	90 days
Task: Lorem ipsum Owner(s): Jane Doe, Jill Doe	Task: Lorem ipsum Owner(s): Janine Doe	Task: Lorem ipsum Owner(s): Julie Doe

Stakeholder Map
Who is really the person or people we need to consider as we move through the problem statement – who is affected?

Individuals are identified by name and role – goal is to create a primary persona for the design – sometimes there can be more than one. Once identified, then teams indicate relationship between all the stakeholders, is one an influencer, are there positive and/or negative relationships, is it neutral?

Let's call our stakeholder Susan – VP of BCM.

Susan has interactions with IT, with the business lines, with vendors and business partners, as well as the executive team and many other parties. Some of these include customers who do not have direct relationships, but need to be considered.

Susan has a number of relationships that she is herself an influencer on and others, that influence her.
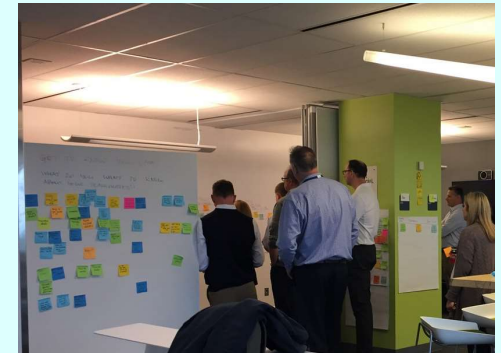
Empathy Map
What's going on with the stakeholder? What is she or he doing about the problem?
What are they saying? thinking? feeling?
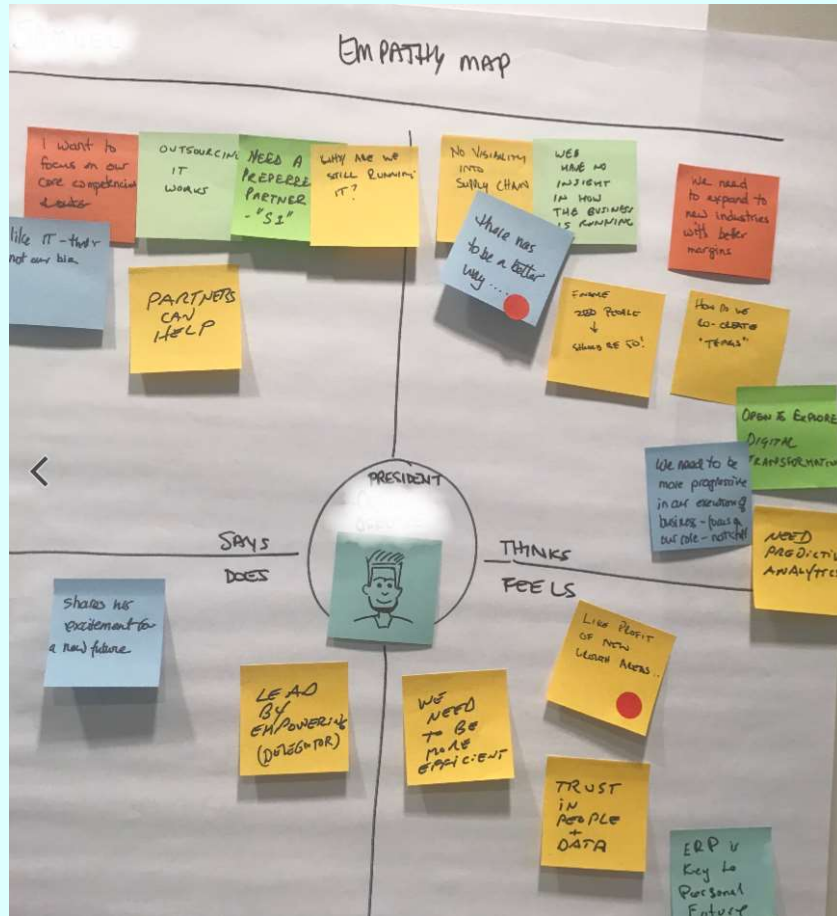
Once the primary persona (Susan) is identified, workshop participants are asked to consider what they are doing, thinking, saying and feeling about the problem statement?

This helps formulate the actual needs statement or 'hill'. What exactly is the 'thing' that needs to be solutioned.
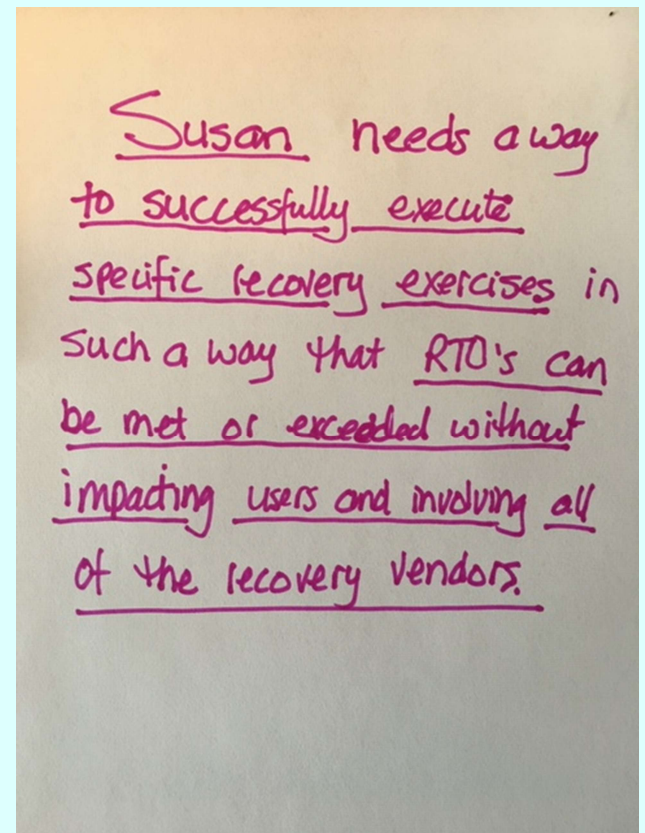
Considering the original 'problem statement – or design prompt' which was to **Automate and provide the right support to our business recovery teams so that they are able to successfully execute a recovery exercise without impacting day-to-day business?** Knowing what we know about the stakeholder and their thoughts, feelings and actions regarding it, we can move to formulating the actual needs statement (hill) and ideating on some 'big ideas'.

Needs Statement
Who is really the person or people we need to consider as we move through the problem statement – who is affected and what is it, that they really need to do?

The needs statement is further focused down to the who, what and how …."wow'. The wow is how the problem will be solved in a way that directly benefits the user.
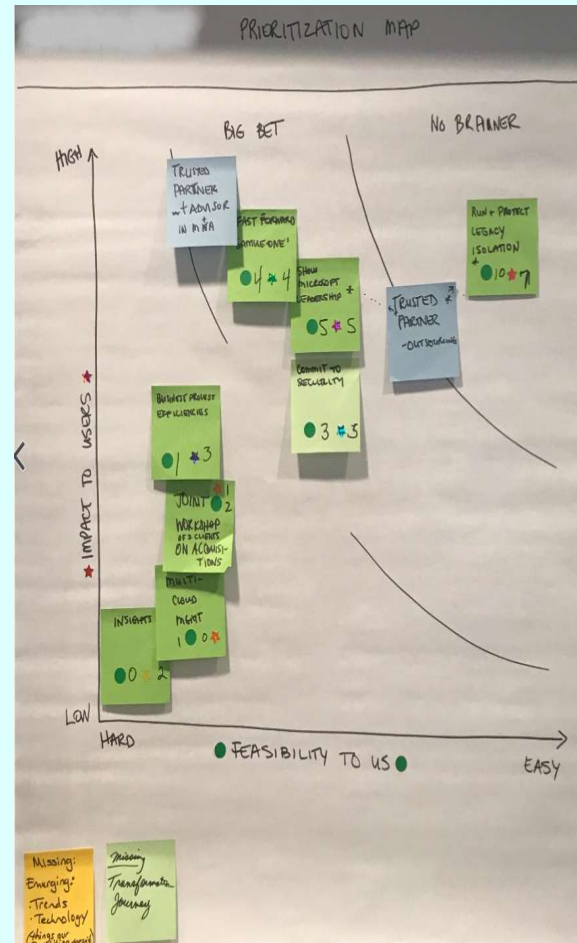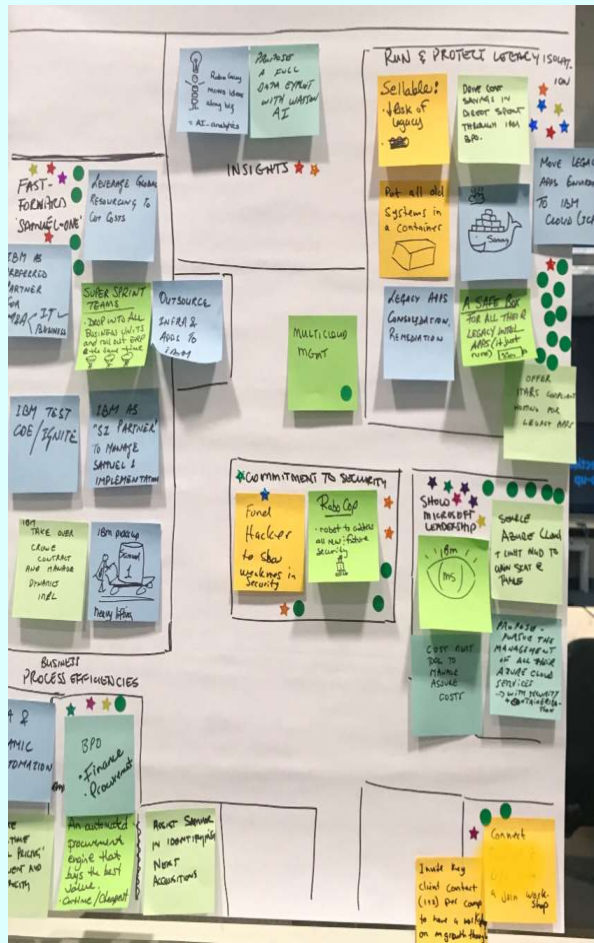
Susan – VP of BCM needs a way *to successfully execute specific recovery exercises* in a way that RTO's can be met or exceeded *without impacting users or having to involve all of the recovery vendors*

Ideation
From all the previous activities … ideation leads us to actions

Ideation involves each participant individually writing their ideas on a sticky note and then grouping them together. This diverge and converge allows for great contributions.

- There are no bad ideas.
- 'Easy Button' ideas are allowed – amazing how often there is reality based on what seems like a crazy idea
- Each participant then votes on feasibility and impact of each idea.
- Ideas are then moved into a prioritization map based on 'big bets', 'no brainers' and everything in between.
- The Big Bets become the action plans.

Do you think that the Design Thinking methodology could help innovate your resiliency strategy?

To Wrap Up

Action plans are derived from the ideation activities and the 'Big Bets'
- Recommended 30/60/90 days based on the urgency but keeping reality a focus.
- Names of ownership and approval – otherwise this is just a list.

IBM's Enterprise Design Thinking training is available to all

https://www.ibm.com/design/thinking

Forrester report on Enterprise Design Thinking
https://www.ibm.com/design/thinking/static/media/Enterprise-Design-Thinking-Report.8ab1e9e1.pdf

Thank you!

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