

**Learning Uncut Episode 65**  
**Dr Kuva Jacobs and Jason Davey – Meshing Design**  
**Thinking with Experiential Learning**  
**Hosted by Michelle Ockers**



**Michelle Ockers:**

In this episode of Learning Uncut I'm joined by Jason Davey from the Design Farm Collective and Dr Kuva Jacobs who is a Learning Design Strategist and freelance learning designer. Kuva has been working with Jason and a team from Design Farm Collective as part of a multi-disciplinary team designing a contact strategy for a bank in the Philippines. They tell the story of the first 12 weeks of this project, with particular focus on the series of one-week long design sprints where they worked with people from the bank to design a series of user journeys. Don't be put off if any of the terms I've just used are new to you – Jason and Kuva define them in our conversation.

One of the reasons that Kuva was part of the team was to deliberately shift mindset and build design skills in the client's team as they worked on the project. This was all done through experiential learning – a real example of learning being integrated with work. The approach taken was creative and fun. And it was all done in a virtual environment with no cameras in a short timeframe. Kuva describes some of the ways they cultivated connection and participation in this setting, and the mindset warmups at the start of each day and reflection at the end of each day. They created opportunity for people to give things a go, including facilitating activities, and in the process unearthed hidden talents amongst the group. It was a period of intensive experimentation and learning which has left a legacy of a shift in mindset, behaviour and capability in the bank's workforce.

The design team also learned and adapted continuously throughout the project. Kuva reflects on how the experience both leveraged and shifted her practices as a learning designer.

For those of you who may be finding the job market tough right now Jason has some great advice at the end of the episode about volunteering for projects to continue building your skills. Enjoy this episode.

**Michelle Ockers:**

Welcome to Learning Uncut to both Kuva and Jason. It's lovely to have you here.

**Dr Kuva Jacobs:**

Thank you.

**Jason Davey:**

Thank you, Michelle, great to be here.

**Michelle Ockers:**

Jason, let's start the conversation with yourself. Can you give us a little bit of information about your background and introduce us to the design farm collective?

**Jason Davey:**

Sure thing. Myself, I'm from an education background. Graduated as a high school teacher, visual arts and design. Have had multiple roles since all that way long ago, up until now. I guess where a combination of all of those experiences and skills in the last 30 years combined has brought me to working with some amazing people. The most amazing group

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

of people that we're currently working with, both Kuva and I, is called The Design Farm Collective. The impetus or the vision for that group is to combine incredible, passionate, and thoughtful people with different skillsets, different areas of interest, different levels of practice, different maturity aspects to the way that we help others help themselves. I know that sounds a little bit analogous at the moment but it's all about helping other people and I think that's at the heart of the drive for Design Farm Collective. It just happens to be that groups of people always bound by organizational structure and a lot of our skillset and history is based on helping organizations to get to their next step. We're helping people help each other and help their customers, help their clients. It's all about laying down the foundational work for good strategy so that we can move them forward. That's pretty simple.

#### Michelle Ockers:

Great, thank you. We'll bring that to life with our case study story today. One thing that I found really interesting when you were talking there is about this idea of being put together with different skillsets, from different domains, and that's something we're seeing in various shapes and forms in terms of doing a great job with getting results from learning in organizations that cross-domain knowledge and bringing in skillsets and different types of people and partnering more effectively across different domains. I think Design Farm Collective is a really nice example of that in action, Jason.

#### Jason Davey:

Great.

#### Michelle Ockers:

Kuva, could you give us a little bit of background about yourself? Would you like to introduce yourself to our listeners?

#### Dr Kuva Jacobs:

Absolutely. I call myself a learning designer. I started my career in a slightly unusual way, which I think a lot of learning designers do. In my case I did a degree in computer science and I decided to do a PhD in mathematics. My PhD specifically was looking at how to visualize mathematics and bring it to life. I did this using back in the day, before all of the learning design software existed that exist now, so I did it all in flesh. I used Flash to animate and enable learners to interact with these visual solutions. From there, I then went on to move into more of a corporate space and I've worked in all different industries. Yeah, from telecommunications, digital marketing, and within defence, all sorts. What I really crave is to be able to find roles where I have got that creative freedom and I'm working with people that enable that as well and importantly to create learning that is actually really about making a different and delivering a good experience for the learner.

#### Michelle Ockers:

Today we're talking about a strategic design project. Jason, perhaps you can give us some context about the client organization you worked with and the business challenge or opportunity that they faced and needed some help with.

#### Jason Davey:

It's a great pleasure to do so. The client today in question is Security Bank in the Philippines. Security Bank, just a little bit of background about them. Security bank is what they term a local bank in Manila, based in Manila, and that local bank means that they don't have often the opportunity or the collateral to play in the spaces of the big banks such as the big higher grossing banks, let's say, in that space. What it does mean is that they have been able to

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

develop amazing relationships with their community. A lot of the work that has helped build relationships between financial clientele and the bank, for Security Bank has been through a wholesale market. So the B2B, they were in essence a corporate bank to start with but local. What that meant was that most of their foundational practices were supporting small to larger enterprises that were happy to be supported by a financial institution that had, I guess a capped level of availability of finances to be able to help businesses. It's not for everybody, local banks. I guess if you were to draw comparisons to the Australian market, we're talking about Credit Unions, at that level. Just to give your listeners a bit of-

#### **Michelle Ockers:**

That helps.

#### **Jason Davey:**

... level context. Great for small to medium size enterprises. Really have on the ground relationship managers style approaches to helping businesses. Highly driven by that very face to face commerciality of branches so the bricks and mortar approach still plays quite a big part in the building of trust and not just with corporations and organizations but with the public. The branch facing financial institution model is certainly how a local bank will build credibility over time. Their challenge, to talk about that a little bit, was that they want to play in the space now that digital offers some opportunity and some affordances but there are some very big logistical challenges in the, not just the financial sector but in the telecommunications' sector. A lot of the areas that we found that came to light as part of this strategic piece of work, that lasted for 12 weeks, was that a lot of customers didn't have access to broadband internet. All of the 12 weeks was essentially uncovering those aspects about not just the organization but environmental, trying to discover what it was about the relationships that the bank already had with their customers without going into too much customer research. A lot of strategic pieces of work tend to fail because they focus a lot of time on design research as part of the first part of the phase of a project. When you have 12 weeks to really set the standard for what is the organization lighthouse, what are they striving for, we really can't afford four weeks of design research to get in the way. We employed some fairly creative ways around giving us some data and achieving an idea of the landscape around research based on the data that Security Bank were able to gather in a shorter period of time. It gave us a bit of a spring into helping define what our focus areas were for the following 10 or 11 weeks worth of work.

#### **Michelle Ockers:**

You were engaged initially for a 12 week pace of work, is that right, Jason? What was the brief? What was the successful outcome going to look like from those 12 weeks?

#### **Jason Davey:**

Great question. The outcomes here were to establish why their contact center wasn't working effectively and how could we design a contact strategy that would be their future path, that would affect their entire offering to their customer base, including their wholesale and their corporate customers. The challenge was quite broad but also we had a fairly good idea around how we would go about bringing people together in order that they felt like we were doing it together.

#### **Michelle Ockers:**

What was your high level plan of attack then? You've got 12 weeks to understand why the contact center wasn't working as effectively or efficiently as wanted, and to design a new

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

contact strategy. How do you do that in 12 weeks? What was your plan going into the piece of work?

#### Jason Davey:

The beautiful part about using a design process or any kind of framework that is design led, it means that we're all okay with ambiguity. That's the messy bit up front. When you've done a lot of these projects before, having that confidence as a team and even whilst we bring on new people, means that we can pretty quickly get to hitting the ground running. A lot of that really does fall up on the weight of how we engaged the design sprint, if you like, the design sprint methodology. We knew we had perhaps a quarter or a third of that amount of time of the 12 weeks available for us to really help and open up people's minds within the organization and teach them some things around what the design process is. What is it around the data that we were gathering around their problem statement and how could we use learning as a practice to be able to continue to engage people along the design process? There's some really lovely overlaps between the practice of learning and development and design thinking as a nice mesh of a framework to be able to help an organization. We're finding a lot of that in our pieces of work over the last five years is that there's no one domain of practice where you get the best results. It's when you mesh a number of those skills and practices together that you really do open up the value of people and their skillset. Internally, that is gold because we know that the future state is we're not there just to do the 12 week piece, wrap it up in a package with a bow and say thank you very much. This is about we're here for the long-term and we're going to invest our time and skills in training and coaching and mentoring over a short period of time to give them a flavour about what it is to work in this way. This leads to the bigger piece around how do you manage organizational change with design thinking and learning practices? We are actually proving it as we go. There's a lot of frameworks and methodologies in place and lots of design organizations and consultancies choose to follow those particular methodologies as they see fit. The lovely part about the process is that we don't know when we start but we can engage and enthuse and inspire using these learning methodologies as part of their practice.

#### Michelle Ockers:

So what I really like about this is that I've had several stories, several guest talk about stories where they've used design thinking approaches as part of designing a learning solution, but what you're actually talking about here is learning during the design process. So you're designing something else, but you're integrating learning with the design work, which I think is really fascinating and that's quite different to how any of my past guest have talked about that relationship between design and design thinking and learning.

#### Dr Kuva Jacobs (00:17:23):

In terms of the 12 weeks, Design Farm Collective has got a specific four phases that we go through, which is prospect, sow, cultivate and harvest. They are built around the idea of a farm which is part of the founder Dave's baby. In the prospect phase, that was really where we were looking at doing a lot of research type work. We did interviews, we looked at the data, what data we could get a hold of and we also did one workshop with them as well, which was led by Jason and Dave, to try and look at what do they want their future to look like as a starting point.

#### Jason Davey (00:19:58):

The prospect was about how much could we use the data that was available so we used very rapid techniques around synthesizing data and information that was available and then we were able to very quickly get to the gaps because we knew we needed X number of

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

pieces of data to be able to complete the picture as the current state. So what we did is invest time in the design sprints which is the second stage, second or third stages where we can help the SME's close up those gaps.

#### **Dr Kuva Jacobs:**

So the next phase was sow. This is where we've got all these seeds and we start to plant them. We were really looking at starting to lockdown what was the work that we wanted to do in the design sprints, looking at figuring out where they wanted to move to in future as well. That went for three more weeks and then we moved into the design sprints which was the cultivate phase.

#### **Michelle Ockers:**

Right, so what is a design sprint then? It's not a term I'm all that familiar with.

#### **Jason Davey:**

The term sprint in this environment comes from the agile methodology of a defined period of time that has a set number of outcomes. Whether you achieve those outcomes or not, depends on a number of things like the team that you bring to work on those particular problems, how well you've been able to break up those problems or those lists of things you want to work on so that it fits within that time and then your approach and your methodologies for being able to get to those outcomes. It's quite a complex layered answer to that. In essence, a design is using the tools and techniques that designers use to uncover information, data that can give us some foresight into the next step and then using some time based strategies to be able to ensure that you're going to meet some goals. That's really a simple explanation of it. There's a lot of complexities that teams build into it and it gets complex later when you start bringing developers and data scientist and when rubber is hitting the road when you deliver. But, from a strategic piece of work, it is the approach to time boxing and giving yourselves some set objectives that you can work with a team on.

#### **Michelle Ockers:**

Yeah.

#### **Jason Davey:**

Is that right Kuva? Feel free to chime in on your take on the agile manifesto. We've both got different views on this but that's essentially what it is.

#### **Michelle Ockers:**

How would you explain it? What would be your words, Kuva? If you were explaining this to a colleague in learning and development that hadn't been exposed to this approach before.

#### **Dr Kuva Jacobs:**

I would say that basically what we were doing is ... I'd start by saying that we had a set of user journeys that we were designing concepts around and we had a fixed amount of time, which in this particular case the design sprints were really short, so we had three days per sprint with the client plus one day of preparation. On Monday we would prepare and then we had three days of sprinting and we had a fixed amount of work that we had to get through in that period as well. After one sprint of a week, we would then go into the next sprint.

#### **Michelle Ockers:**

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

Okay. Kuva, you describe yourself on your LinkedIn profile, in regards to this project, you used the term, confused learning designer. Why confused?

#### Jason Davey:

Aren't we all? Aren't we all confused?

#### Dr Kuva Jacobs:

You see, usually when I'm engaged as a learning designer I'm doing learning design but I feel like on this project I was really doing a lot more than learning design because I was engaged across a whole bunch of tasks within the project. Right from within the analysis phase, I got pulled in to run interviews and then I was building a research report around what came out of the interviews and then into the design sprints. It was definitely not pure learning design because we were so very much involved in the actual design work as well. It was a two-part role in terms of both learning design and design.

#### Michelle Ockers:

It's interesting because often learning designers will say, "I got involved too late. I was engaged too late in the process to really get deeply grounded in what it is we were trying to do or to have any influence." I'd be really curious about how it impacted your ability to contribute and shape your work, being involved right up front so early. Also, what skills or what different perspective you think you were able to bring to that earlier work because of your learning experience background?

#### Dr Kuva Jacobs:

Yeah, definitely being involved early I had a really good context of the project and I was really well framed for when I came into the later part of helping with designing the sprints and the learning around the sprints. I guess for me, in the earlier phase it didn't feel so much like my learning design skills were being used but more so my previous background in research and math and all of those other skills which don't get used very much these days. It was nice to use different muscles, I guess is the way I would say it.

#### Michelle Ockers:

Talk us through a design sprint, just pick one of the design sprints and talk us through it from the perspective of what you were trying to achieve because it's like a parallel thing happening here. There's a design outcome but there's also a learning outcome that you're working on at the same time. Maybe a peak at a sprint, talk to us about what you were trying to achieve through the sprints and some of the key things that you did as someone who's working on the design side of it but also working on the learning side of the sprint.

#### Dr Kuva Jacobs:

I'll start with the learning part. My role was basically to build a really good learning experience throughout the design sprints. Because, during the sprints we were really taking the client along a journey. We actually had to not only get them to do design work, but we had to teach them design thinking as well. It was like learn by doing, definitely. That involved two parts. The first part was the actual design thinking process and activities, which I'll talk you through in a minute, but the second part was actually a mindset shift. Getting them to think differently, so think more human-centered, think more future focused instead of just limiting their thinking in terms of the current state of the business which is what a lot of people do when they're making business decisions. We built a lot of gamification around it to encourage that learning and that fun and to drive them forward. We were using points, we were using all sorts of different motivations to get them to think differently.

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

#### Dr Kuva Jacobs:

The goal of one sprint was to develop the future state concepts for a set of predefined user journeys. Each journey had a series of design activities. Here's a high level of that, the first thing is we looked at the research. As we mentioned, we spent time doing research which was both data driven and also based on the interviews. We looked at that research with them, all of these activities were conducted with the client, and we looked at is there any data or anecdotal evidence from this analysis phase about the user journey or its impact on customer experience?

#### Michelle Ockers:

Kuva can I just get you to pause? I'm just really conscious of terminology. What's the user journey?

#### Dr Kuva Jacobs:

I'll let Jason answer that one.

#### Jason Davey:

Again, you've got all of these great questions that have got so many layers of complexity when you ask different people the same question. A user journey in essence is essentially the steps or the process or the experiences that a person would go through, we coined the term, interactions, either with technology and, or other people. Very simple. In the strategic approach to this contact framework ... one of the deliverables for this piece of work was to build a framework that the entire contact team and the bank, so anybody that has contact with anybody else whether they're a customer or another organization and even staff members, could use that framework in a successful way. When you're talking about baselining user journeys. User is another one of those analogous terms around digital. We consider user journey and it has developed over a period of time, where it's multiple touch points with either technology or other people and you're tracking those across a sequence of time and in order to understand either pain points or opportunities that you might want to surface as pieces of work for future design teams to get into. When Kuva said, "The 20 journeys that we were basing all of this upon." The broader contact strategy requires that we're shifting people's mindsets to not just build bank products but to help them work out the starting point that these journeys will take them on and then what are the future journeys that their staff and their customers will go through. It is completely flipping the lid on product centric delivery and focusing on journey based delivery. Really looking at the interactions and the value that you get out of people helping others and how digital plays a part in that. That's really what we're about.

#### Michelle Ockers:

Okay so the journey you're talking about here Kuva, can you just remind me, what was the journey that you're thinking about as you talk us through the process here?

#### Dr Kuva Jacobs:

Would you like to have one example of a journey, would that help you?

#### Michelle Ockers:

That would be really helpful, yeah.

#### Dr Kuva Jacobs:

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

All right. One example of a journey was loan experience simplification. Basically, when they are applying for a loan, how is the way to make that experience as simple as possible?

#### Michelle Ockers:

Lovely.

#### Dr Kuva Jacobs:

Once we've looked at the research and the implications of the research, the next part was that we ran what's called an idea factory and basically what that enabled us to do was collectively brainstorm ideas on how to create new concepts. This is where we really encouraged that divergent thinking. Coming up with lots of ideas that are really wacky and crazy and out there, we really pushed them to be thinking outward because maybe the idea that they came up with isn't such a good one but then it triggered someone else to come up with a really good idea. For example, a Tinder app for choosing your banker or a banking teddy bear that you press a button and it gives you banking solutions are some of the crazier ideas that came out. This was really a favourite activity for me and also for participants as well. They really enjoyed it because it is a lot of fun. From there we had all of these ideas and this was all done in Miro by the way, virtually. The next step was to collaboratively cluster and theme the best ideas. Which became our hypothesis of how we could improve the service, to deliver better value. The great thing about the grouping was it removed the sense of ego that was attached. When you come up with ideas you have this ego that this is my idea and I like it because I came up with it. In order for ideas to be successfully driven by a group, you need to make it the group's idea and not the individuals. That clustering and theming, it actually helped to shape the ideas as being group led which was really amazing. The next step is we had our idea and then we had our hypothesis built around that idea and from there we came up with just a very simple user flow that mapped the interactions rather than the technology. So how is this particular journey going to look as the user stepped through it? We then built concept visuals around it and did some pitching as well. We got them to pitch which was great fun and we also discovered some hidden talents of their team as well that we were working with, which was very cool. Then the final part of the design sprint was to build surveys around it. Jason is our survey master so he was super rapidly building them out in type form and then we had our team from the bank was sending out these surveys to people within the bank and we were collecting their feedback on the concepts as to whether they liked them, whether they thought it was going to work or whether there are any improvements. Then we had concrete data on what people thought of this idea, which they could then analyze and that was the end of that sprint. Then we forwarded to the next sprint.

#### Michelle Ockers:

That's really clear. Thank you for walking us through that example. That's super helpful.

#### Dr Kuva Jacobs:

No worries.

#### Michelle Ockers:

From a learning perspective then, what's going on while people are going through this experience? Obviously they're going to be learning things but I understand part of your role was to deliberately shape the learning, the mindset shift, how did you approach that? What did you do?

#### Dr Kuva Jacobs:



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## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

Yeah, as you say, the mindset of the participants was really important because we wanted to get them to be courageous and also future thinking as well. We didn't just work through design activities; we actually dedicated a lot of energy to creating the right atmosphere. One of the first things that we did each day was we had some important daily rituals. For me I have this thing about making the first minutes of a Zoom meeting or a virtual meeting really count so that when you join there's no awkward silence. We set up the initial board, had a warmup activity where they would share something personal so each day it was something different like their favourite food, a photo of their local area because we were all from all over the place. So we had all sorts of different things that we would do each day with them and that also made us have a bit more of a human connection with them as well. We couldn't see them, we only had sound, we didn't have visual which made it really hard to build that human connection, so we had to be quite creative in the way that we did it. We also in those early moments had encouraged healthy habits as well. We set some ground rules for how they should interact during the sprints as well. Like trying to encourage them to be outward thinking, using their stickies, posting ideas, not holding back, lots of different ground rules that we put in there as well. The next part was running a quick stand-up. We were quite big as well on trying to get them to own as much of the activity as possible. We wanted them to be interacting and we wanted them to be taking ownership. As the sprints moved forward we also transferred parts of the facilitation over to them and got them to volunteer as well. Which was great because we could hear their perspective and it gave us a little break from talking. It also meant that they could bring their own energy forward as well which was lovely.

#### Jason Davey:

It's probably worth mentioning there too that we knew that beyond this 12 weeks' worth of work that we had to fairly quickly identify the people who we could trust to be able to do the kinds of things that we were coaching and facilitating for them and with them. Because this way of working and this change means that they have to be advocates of the method, they have to love it, they have to feel impassioned about the outcomes and how they got there and for them to be brave. That whole leaning in and trusting that they've got this, is a massive part of the learning outcome. We knew that and the difference between our approach for helping them do that is that we told them that, that's what was going on. Often in a learning environment you have the facilitator or the principal educator and a bunch of people who are learning things. That traditional interaction, the one-way interaction, is not our style at all. Our style was to say hey, this is actually what's going on, so this is your opportunity to take a hold of the future ... we're not just designing the future but we're giving you opportunity to be the future. This learning method that Kuva has identified meant that they could take ownership of that and we could feel positively guaranteed almost that we had that mechanic of being able to measure how good they were at it because we were adopting and adapting as we went through each sprint.

#### Michelle Ockers:

How willing were people to be the first to step up? We talk a lot about psychological safety and creating safe spaces and you've got this space where you guys actually can't see them so you've reduced the number of tools or ways of communicating to build a safe space to encourage people to step forward. What was your experience of people's willingness to take that step to be courageous and what did you find worked to help to build a space where people were willing to take those risks?

#### Dr Kuva Jacobs:

So definitely the ... this is coming back to the gamification, so that was really important because as they first joined ... it's a different culture, they're quite a lot more shy. I'm sure

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

that if we were in Australia we would have a whole different set of challenges but in that particular case they are a lot more shy and a lot more reserved and not wanting to say the wrong thing. We did build a lot of gamification to encourage participation, encourage them to be a little bit crazy. Just from simple things like hiding coins all over the board and then watching what they would do with the coins and then changing the rules so they weren't allowed to collect coins anymore, they had to give it to somebody else. We constantly changed the rules and tweaked the rules to see what impact that would have on their behaviour. Which was really fascinating and also fun at the same time, I have to say. The next activity after the stand-up, which again I flipped back on to them after the first couple and said, "You guys have to run that," Was to move them into a mindset warmup. Each day I would design this warmup with different objectives in mind depending on what we were trying to do in the sprints. Some of the ones that were real favourites were ... one of them was developing a Google glass prototype out of paper. They also had to upload the photos of themselves so that was quite fun to see them all dressed up in their glasses and also talk about their approach and that was quite interesting because one of them would be really focused on the technology and the different tools that were being implemented. The next one would be focused on the experience of the person was wearing it. It was really lovely to see. Then another one that was a favorite was time travel. I got them to travel forward in time. Firstly, to Utopia, which is very open to imagine and then bringing them back to 2040 and then 2025 so that when they're thinking about designing that they are in that future thinking space. Another one that we used was the Six Thinking Hats. So de Bono's, Six Thinking Hats and what that one was great for was getting them to look at ideas, look at the work that they've done, but from different perspectives. It was shifting them outside of their comfort zone. Each day there'd be a different activity, sometimes we had battles for example. That meant that we were really stepping them forward and getting them to be comfortable with being outside of their normal role. The feedback that we got from them was really, really positive. They really enjoyed this.

#### Michelle Ockers:

Yeah, it sounds like really experiential and really a lot of fun, right?

#### Dr Kuva Jacobs:

Yeah, for everyone actually.

#### Michelle Ockers:

Not how we sometimes think about the experience of learning at work, right?

#### Jason Davey:

I think it's worth mentioning here too that the fact that we're working remotely was one factor. The COVID attributes and ways of working, we didn't feel that that was a limitation. We went and had permission to explore as many means as possible to be collaborative with the tools that we had. I think Kuva's energy and enthusiasm and experience in constructing different methods to get people to think in different ways was a real success trigger to the design sprints. Having run them before without that methodology and incorporating those cognitive approaches to opening people up works hand and hand. We felt that it was an invaluable approach to being able to get some really good outcomes in such a short time.

#### Dr Kuva Jacobs:

At the end of each session we ran what we call daily reflections. In the daily reflections we had four parts and this was on Miro. The four parts were what did they learn? What was their biggest challenge? What were they grateful for? And what had they achieve that day? In

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

doing that activity, it was a group activity, and we also, all of the facilitators who were involved, were doing it as well. It became a really beautiful team activity that allowed us to capture feedback in a positive way and it also helped us to refine the sessions for the next day as well.

#### Michelle Ockers:

Very powerful. I think one of the things we can pick up on from the world of agile, from the world of design thinking is this idea of regular retrospective and regular reflection and building it into the flow of work. It's something I often talk to people about is, think about your flow of work, your operating rhythm with your team and having to build these things in. There's a great example of how you did that at the end of every day. Did you need to shift your approach much as you went along, Kuva?

#### Dr Kuva Jacobs:

Yep.

#### Michelle Ockers:

Tell me about ... give me an example of something where it's like there's a clear indicator here that we need to change our approach to something and how you responded to that.

#### Dr Kuva Jacobs:

Sure. With the ideation we ... first of all, the way that we organised the groups, we changed that quite dramatically over the course of the design sprints. During the first sprint most of the time we had people working in partners but what we found is that because they were working in partners, then it was creating that idea ownership and they weren't getting the benefit of moving through different user journeys, the user journeys weren't getting the benefit of lots of people's ideas. Then we shifted to create the idea factory where it meant that we were working as a group on one idea, for that first part and then the next idea. Because we were under such tight timeframes we really had to be careful about how we could structure the group interactions because we had to keep them really short and sharp. We also at some during the sprints we realized that there wasn't enough work done on what other banks were doing so we started to build an activity as well where they would go out and do a little bit of research on what they could find for particular user journey that was already out there on the internet. That was an additional activity that we built in as well. The idea smashing, pulling these ideas together, grouping and clustering them again, that was something that was introduced partway during the sprints as we realized that we could ideate better on that idea factory concept as well.

#### Michelle Ockers:

Jason you're going to have a lot of people wanting to sign up to work with Design Farm after this. It just sounds like such fascinating, interesting work.

#### Jason Davey:

Yeah, and it's fun too. I think that one of the real founding principles is that if it's not engaging and if it doesn't achieve some sense of direction pretty quickly, then we'll just discard it and I guess that was the outcome of iterating on the sprints is that we could pick and choose and run many experiments and then go as a team, the three of us, Kuva, Alice and I, could really just have a very quick conversation to say, does this work for us? Let's build it in. In the next day or in the next hour sometimes, that activity was born to achieve something else. I think that when you pull that back and have a look at lifelong learning, that's the value of being able to work in this integrative way, is that there are learnings in

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

every micro interaction as there are on the big events that you might go to as a student of what you're trying to learn.

#### Michelle Ockers:

What do you think were the keys to why this project worked so well?

#### Jason Davey:

The learning components we've been talking about today, specifically because that's the topic of interest, there were so many other elements that were wired into this 12 weeks. We knew that the guts of whether this four-week period of intensive learning and experimentation, we knew that it was shooting for that behavioural change. We had a lot of ... there were a lot of methods that we brought to that approach but we never made it scientific. One of the real important factors about this is that not everyone wants to know the method around how you're teaching. They get engaged with why you're doing it in the first place. I think that fundamental approach and principle about saying, we're designing the future together and always bringing it back to that, no matter what it was ... we can almost throw any exercises and learning activity at this team and that was it because they felt like that they were proud to own that approach. They were proud to say, "We're giving it a shot." In different cultures, that means so much to getting to an effective outcome. More so than just going, "Hey, you've learned 10 out of 12 things on this curriculum so you've actually got to where you need to go." It's not that anymore. This is why the overlaps of these approaches are so important. We're changing the face around how learning needs to work collaboratively, and there are a bunch of other design thinking organizations who have had lots of successes in this approach or similar approaches. I think one of the other most important factors of why this worked is that we knew that that was just part of it. If we could tell those amazing stories that came out of that effort, that work, that passion, that lust for doing well, we knew that we could inform and inspire the senior members of the organization to really sit up and take notice. This was the action. This was the, this is not just a bunch of designers coming up with some highfalutin path around what they feel is the answer. They've actually gotten in and proved that they can wrap their arms around a bunch of people to really make a shift in the way that they do work. That was the biggest takeaway for us and for them too.

#### Michelle Ockers:

At some point the body of work that you're doing there will either be over or you hand it back to the organization and you're not breeding a reliance on you being there all the time. What's the legacy you're aiming to leave them with?

#### Jason Davey:

Great question. I think that's in a couple of parts. Kuva, do you want to answer that from a learning perspective? Then I can take the strategic approach from an organization perspective.

#### Dr Kuva Jacobs:

Yeah. I think from a learning perspective, I feel like it really opened up the mindset of the people who were in the design sprints. One of the things that we didn't discuss was that at the end of the design sprints we felt like we needed to showcase what we had achieved and so one of the last activities that I ran during the sprints was to start mapping out the showcase. Jason lifted that from me and pushed it a whole other three levels up and said, "Guys, I'd like you to build yourselves a showcase." I think that that was really amazing because we could have just taken it and built the showcase ourselves but instead he pushed

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

it back onto them and he gave them a skill that they've never had before. Honestly, it was one of the best showcases that I've ever seen. They have some really, really talented visual designers in there who did some great visual design work. They had some fantastic people feeding all of their enthusiasm for the sprints back into that showcase. From that we could really see how much they'd enjoyed it and also how much they learned and that it had significantly impacted their behaviour and their mindset and their attitude towards work. I think that was a really big win.

#### Michelle Ockers:

Great. Great example and great example of uncovering talents which might otherwise not be unearthed and utilized in an organization.

#### Dr Kuva Jacobs:

Yeah.

#### Jason Davey:

Yeah, the once a month KPI discussions that employees would have with their managers would never uncover some of the skills that we were able to in that short period of time. There was one guy particularly, that this brings to mind, that had an amazing radio voice. When he presented he was this DJ announcer. It had everybody engaged and leaning in and applauding him. And he had this really nice way about articulating the essence of what was coming up. A broad range of skills and that's just one standout example was that perhaps he would never have been able to expose that side of him if he wasn't given this voice or this opportunity to speak out.

#### Michelle Ockers:

Jason, at a strategical, cultural level, what's the legacy you're aiming to leave the organization with?

#### Jason Davey:

These people are leaders. These people have the opportunity now to step up and we've always positioned it the fact that when an organization identifies people that have value and have passion and want to be involved in this kind of work, in this new way of working, then they're demonstrating their effectiveness of being able to step up. We are really changing the HR model at the same time. This is one of those invisible layers I was talking about earlier. Underneath all of this, the motivations for people to put their hands up and to say yeah, I'm absolutely going to give that a go, they've demonstrated this in the way that we've been able to give them that opportunity over those four weeks. But we've allowed them to take it further. From the showcase, one of the legacies are that there are about four or five identified team leads that will now scale that approach across the organization. To your point Michelle, we can't do this as a small and robust design team, an external team to the organization. We can't continue to do that piece of work forever and the value that we offer them is that we're coaching and helping them facilitate that way of working. The legacy there is that they'll continue building on these exercises. We'll continue supporting and facilitating and mentoring them in that process. The legacy there is that as they adopt these newer ways of working, it's seamlessly becomes the way that they own their own transformation programs or the way that the business scales transformation across the organization. That's an amazing legacy when you know, particularly as many projects that I've done in transformation, there's an abrupt halt when the money stops. When the project funds run out, transformation goes okay, we're done let's move on to something else. Oh I know, let's do another transformation program. And on and on it goes. I've done way too many of those

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

to count in the last 20 years of my career. This way we're really informing a way that this learning legacy, this approach for people being able to learn what they're passionate about and how they support each other, in terms of what they can achieve together and that's an amazing legacy. I'm super proud of the team that we were able to combine for this short period of work and bring ... this is Kuva's first run I guess with Design Farm and the way that we're working and she did splendidly around approaching this in the same way. Breaking some of the traditional ways of learning was a real legacy as well. Not just for Security Bank but for us too. I think there's lots of high value outcomes here for both teams all around. It's lovely way to do it. It's never done, learning is never done. I think transformation is always constant. Just because the money runs out, that the project stops. This is something that teams of people can continue to work at and we're constantly working at it anyway. As professionals in this practice, I'm always learning something. Having Kuva join us for this piece of work taught me a lot as well around the approach and some of the ways that we can adopt it.

#### Michelle Ockers:

Kuva, talking about what you brought to the team. What did working on this project reveal to you about your mindset and practices as a learning designer?

#### Dr Kuva Jacobs:

Following on from Jason's point, I definitely feel like this project was a major transformation for everyone who's involved and definitely myself included as well. The first part of that, it was a really amazing team to work with. Quite often I find that I am the learning designer working with subject matter experts who aren't learning designers so you're taking them along that learning journey but in this case I had Jason with me. He taught me really a lot about learning design from a different perspective because even though we've both got lots of experience, he has a very different set of experience to me. So that was really amazing. It definitely helped me to level up both my learning design practice and also my facilitation as well. We also had two other amazing team members and I think that sharing the load, being a group facilitating ... we basically shared that facilitation load between all four of us as much as possible. Which was really, really helpful. Firstly, from an energy perspective but also we created this fantastic banter within the four of us that just lifted the energy up for everybody and really made it a fun experience. I think one of the things that was really the most important part for me about this project was having the freedom and the setting to really flex my creative muscles because I find that in learning design so often you are so constrained by all of the, it needs to be this content, it needs to be delivered in this format and you've got a very small window of time to develop it and it has to be professional, it can't be fun and it needs to ... once you've got all of these big framework of constraints around you then you really don't have much space left for creativity. Whereas, in this case I firstly could just develop training with a whole lot of freedom and I loved being able to focus on that mindset element as well as the process side of things. Probably the most exciting bit as well was being able to ... so often I'm develop a learning or I develop slides for other people to facilitate, but in this case I was developing the content and then I was straightaway testing it out on my audience as well. So I was getting to experience their reactions and that was really great because I could see what worked and I could see what didn't and then I could look back and refine what I was doing as well. It was constantly getting better and improving.

#### Michelle Ockers:

What tips would you have for a learning designer in the position you just described, who's constrained by the brief they've been given and they want to be more creative. What advice, almost thinking like advice to the future Kuva if you should find yourself in that situation

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

again, what tips or advice would you give to other learning designers for how to be able to be more creative in more traditional settings?

#### Dr Kuva Jacobs:

I always try my best to be as creative as I can. I think it definitely requires you to probably work a little bit harder because if you just try to do bare minimum then you won't have the space to be creative. I think it's also about setting the expectation up front as well of wanting to be creative. I go into meetings now, if I'm having an interview with someone it's one of the first things I'm going to be saying is that I don't just want to create learning, I want to create a good experience for the learner and I want my learning to be impactful. The second thing I think that is really important as well is who you work with. Because if you work with people who that's what they want, then you're constantly having to break their barriers but if you can find the people who think like you and want to work like you then you become a team and maybe you need a salesperson or someone whose responsible for setting that expectation for you because it's very hard to do for yourself as well, is another thing that I learned. When I'm doing the expectation management and the learning, I find that there's a lot more barriers to cross but in this particular case we had David who's an excellent stakeholder management, probably better than anybody I know, he did an amazing job of creating that freedom that we needed in order to be able to explore and play and be creative.

#### Michelle Ockers:

I think the people working inside organizations, building your influencing skills, your stakeholder management skills and getting better at setting the expectations and having the courage to try to push the boundaries can be quite important as well, yeah.

#### Michelle Ockers:

Jason, for people who might be wanting to work more effectively at a strategic level on generating cultural change and taking some of these approaches and working from the ground up, what tips would you have for them for getting started?

#### Jason Davey:

Yeah the converse works. If you're interested in working in this particular way, it's no longer ... from my perspective, it's no longer having to get in at ground level and work your way up. One of our team members was a volunteer and she was extremely grateful for the opportunity to just be allowed to play, just be allowed to be brought into the team and whilst that was ... at a level of effort for us, we were coaching her as well as we were coaching the client's employees. Those opportunities are extremely satisfying if you can align yourself with saying I've got some time, I'd love to come and volunteer and learn from a team as you're working through this process. One of the approaches that I'd recommend for any level of designer with any domain of practice, is just to start having those conversations about the kind of work that you would like to do. Design thinking is not new, it's been around for a long time. The way that those concepts and constructs are applied, there's definitely a lot of creative flexibility and freedom with the team that you decide to go and work for. Another tip would be just to do a little bit of research about who's doing what. Often now we're using social streams and promoting the work in case studies, like you do Michelle on a lot of our design teams behalf, again I have to thank you for that and with all of your listeners tuning in, it's a great way or us to help tell these stories. I think for people wanting to shift in this way, it's not about having to have 10 years experience. The person who we had on as a volunteer, picked up this learning facilitation components of it really fast. She helped develop her own sense of confidence and trust. This far outweighed where she would have gotten if she was to send out 20 resumes to the consultancies and design teams. For her it was an awesome opportunity and probably very timely for her but the opportunities exist and there

## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

are lots of teams out there who are willing to say, let's coach someone, let's take them in and let's help them along their journey because that's what we're about. The people that really believe in that are really going to support people who want to shift and change the way they want to work. That's the basis of what we're trying to do anyway.

#### Michelle Ockers:

I think it's great advice in the current job market in particular. Thanks so much Kuva and Jason for sharing your work and insights with us. We're going to link to both of your LinkedIn profiles and we always try to encourage conversation on LinkedIn as well where we post about the episode so hopefully we'll get some conversation going there. So for our listeners, what are your thoughts in response to this discussion? How could you apply it? What questions might you have for Kuva or Jason? Head over to LinkedIn and join in the conversation there. Look for us with the hashtag #LearningUncut. Thank you so much for your time today Kuva and Jason.

#### Jason Davey:

You're very welcome. Thank you Michelle.

#### Dr Kuva Jacobs:

Thanks Michelle.



#### **ReThink Learning – A Message from Michelle Ockers**

*I created Rethink Learning to help learning teams and learning professionals with this challenge. The barriers to learning innovation are lower than ever. Now is the time to engage business stakeholders, embed good design practices, work in agile ways and use technology more effectively.*

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#### **About Michelle Ockers**



[www.michelleockers.com](http://www.michelleockers.com)



## Learning Uncut Episode 65

### Dr Kuva Jacobs and Jason Davey – Meshing Design Thinking with Experiential Learning

*Michelle Ockers works with business and learning leaders to realise the untapped potential of learning in organisations. She is an organisational learning strategist and modern workplace learning practitioner. Michelle works with organisations to develop and implement transformative organisational learning strategy, and to build the capability of their learning team. She delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events. Michelle also mentors learning professionals at all career stages on career planning and professional development.*

*Michelle received the following prestigious industry awards in 2019:*

- *Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D Professional of the Year – for outstanding contribution to the practice of learning and development*
- *Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning*

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