ABOUT THE HUMAN INSIGHTS TOOLS

The Human Insights Tools from Prosperity Now are intended to take you through the process of **discovering** opportunities for innovation from clients’ point of view, **designing** solutions to meet those needs, and **testing** your ideas to ensure they bring about the needed change. The suite of Human Insight Tools includes:

<table>
<thead>
<tr>
<th>Discover</th>
<th>Design</th>
<th>Test</th>
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<tr>
<td>• Frame the Challenge</td>
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<td>• Draft a Journey Map</td>
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<td>• Diagnose Barriers</td>
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<td>• Conduct Individual Interviews</td>
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<td>• Decide Next Steps</td>
<td>• Brainstorm Solutions</td>
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**Additional Tools**
- Logic Models for Innovation
- Advanced Interviewing
- Advanced Testing Methods

These tools are designed for you to use on your own or in collaboration with others. To help guide you through the activities and provide options for people with varying levels of experience and time, we’ve provided the following features.

**Activity Summaries**
Each activity concludes with either a checklist or summary meant to help you document the most important thing you are trying to learn. The summaries can be pulled out, printed, or transferred to a flip chart posted in the room so you have a visual reference as you move through the toolkit.

**Helpful Hints**
Small bits of wisdom from experience that might be helpful as you work through the activity.

**Examples**
For each activity, the toolkit includes examples populated with content from AIM Consumer Credit Counseling Service (“AIM CCCS” or “AIM”). AIM CCCS is a fictitious credit counseling agency providing a variety of services ranging from financial coaching, to student loan counseling, to administering a Debt Management Plan and has been operating for more than 20 years. The AIM example is loosely based off Lutheran Social Service of Minnesota Financial Services. The example has been simplified and altered for illustrate purposes. The reader should be mindful that the examples are abbreviated and are not meant to illustrate what Prosperity Now and Capital One believes to be innovative credit counseling services. Your project may vary significantly from the AIM example because your clients and your organization are unique.
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Order of Activities
The activities are ordered in a path to help agencies that have identified a challenge within an existing service. However, if you have a different situation, you could consider revising the order of the activities or completing activities individually. Here are some examples of different paths an agency might take depending on where they are in the innovation process.

<table>
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<th>Order of Activities When You...</th>
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<tr>
<td><strong>Don’t Know What Challenges Clients Experience</strong></td>
<td><strong>Already Have a Solution in Mind</strong></td>
</tr>
<tr>
<td><strong>Discover</strong></td>
<td><strong>Design</strong></td>
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</table>
| 1. Conduct individual interviews  
2. Frame the Challenge  
3. Draft a Journey Map  
4. Diagnose Barriers  
5. Conduct Individual Interviews (2nd round)  
6. Decide on Next Steps | 1. Create Prototypes  
2. Get Feedback from Clients  
3. Decide on Next Steps | 1. Draft a Journey Map  
2. Diagnose Barriers  
3. Conduct User Test  
4. Decide Next Steps |
| **Design** | 4. Survey for Concept Appeal and/or  
5. Conduct User Test  
6. Decide on Next Steps |  |
| 7. Brainstorm Solutions  
8. Create Prototypes  
9. Get Feedback from Clients  
10. Decide on Next Steps |  |
| **Test** |  |
| 11. Survey for Concept Appeal and/or  
12. Conduct User Test  
13. Decide on Next Steps |  |

Helpful Hint: Quick tips to help make the work both fun and easy
- Work with a team of four to six people from across your organization
- Bring in an outside facilitator or identify someone on your team to play this role
- Assign notetaking responsibilities to ensure your team’s insights are captured
- Get buy-in from management and direct service staff
- Schedule dedicated time for the work
- Use project data to help you progress through the activities
- Leave some breathing room for setbacks and adjustments
- Conduct client interviews during each activity to allow for deeper engagement and insight