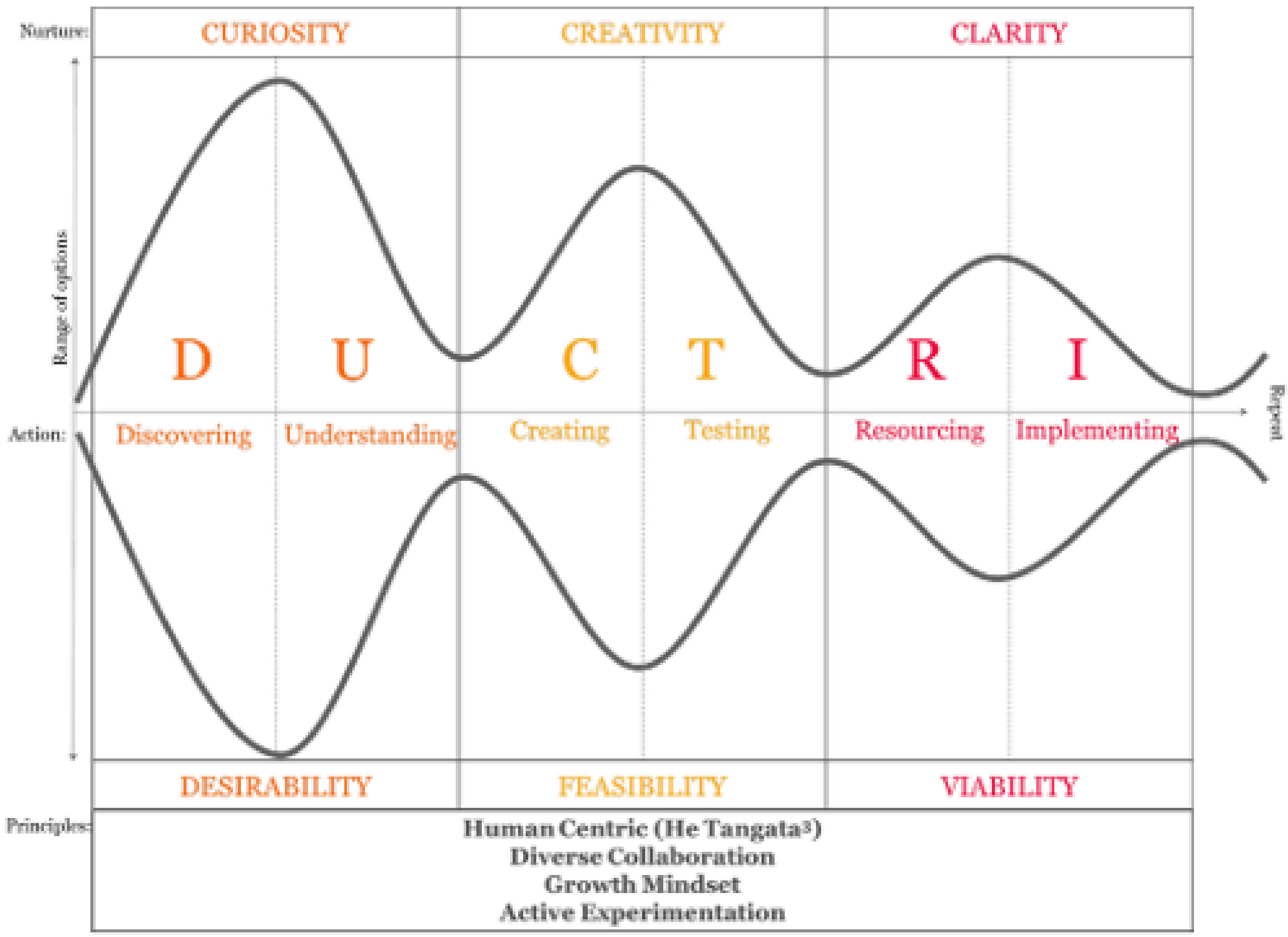
DUCTRI Model & Key Tools Guide



Credit: Christian Walsh

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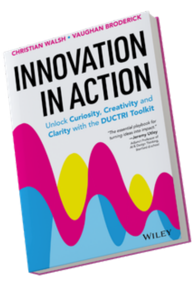

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Discovering Tool: Compassionate (RAISIN) Conversations

Start discovering by speaking directly with the people experiencing the issue.

What is it?
Compassionate conversations involve speaking directly with people affected by the issue you are exploring to understand their lived experience. We use the term conversation rather than interview because it encourages a more curious, open, and human exchange, rather than a rigid question-and-answer format.

Why is it useful?
Talking with people who experience the issue first-hand is one of the fastest ways to challenge assumptions and uncover real insights. These conversations often reveal nuances and human factors that are difficult to see when discussing problems from a distance.

When to use it?
Use compassionate conversations early in the Discovering phase to begin understanding the issue. They can also be used throughout the process to sense-check insights and keep the work human-centred. If speaking directly with affected individuals is not appropriate or ethical, speak with people close to the situation, such as professionals who support them.

How to use it?
Use the RAISIN guide to support effective conversations.

R – Rapport
Create a comfortable environment and clearly explain why you want to learn from their experience.

A – Active Listening
Focus fully on what the person says and how they say it. Use follow-up prompts to explore interesting moments.

I – Impartial
Remain neutral. Avoid leading questions or projecting your assumptions onto the conversation.

S – Shut Up
Encourage the participant to do most of the talking. Silence and simple prompts often reveal deeper insights.

I – In Deep
Move from general experiences to specific examples and emotions to understand the situation more fully.

N – Next Steps
Thank participants, ask who else you should speak with, and reflect on what you learned before the next conversation.

Wins, Bins, Crystal ball

Project: .... Date: ....

WINS	BINS	CRYSTAL BALL
Podium	Scrap	1 yr
Top 10	Repair	2-5 yr
P.B.s	Redesign	5+ yr

Discovering Tool: Wins, Bins, Crystal Ball

Find out what is working well, what is not working and what the future may look like.

What is it?
Wins, Bins, Crystal Ball is a tool we created for facilitating an early group discussion and discovering the pros, cons and possible future around an existing issue.

Why is it useful?
It is a useful tool for an existing team or group that have some shared experience of a particular issue. It helps bring to the surface not only the problems that may exist, but also what is working well, so this doesn't get lost. It also provides an opportunity for people to think about while the current situation may have its pros and cons, it may or may not still be relevant in future and so what does the future hold?

When to use it?
It is a good tool to use when reviewing an existing service or situation where there is some potential for improvement or change is needed. Using this early in such a process allows for people to let their perspectives be heard and this can help frame the direction of further discovering and understanding work.

How to use it?
Pre-work: As with many group facilitation tools, this works best when you can get people away from their usual space and routines. You will need a stack of sticky notes and marker pens, for each participant and a large wall or series of flip charts. Have three flip chart sheets up on the wall, or divide a whiteboard wall into three vertical sections. A template is shown in fig. X, but this is easily replicated and best done by hand. At the top of the left-hand section write "WINS" and draw a medal next to it. At the top of the middle section write "BINS" and draw a rubbish bin next to it. At the top of the right-hand section write "CRYSTAL BALL" and draw a fortune teller's crystal ball next to it.

Step 1: Set the Scene - Welcome participants and briefly explain the topic, issue, or challenge the session will explore. Ensure everyone has sticky notes and a marker.

Step 2: Individual Reflection (15 minutes) Ask participants to work quietly and individually. This individual thinking time helps avoid common group bias and encourages independent ideas.

On separate sticky notes, write one idea per note for:

- Wins – What is working well now
- Bins – What is not working well
- Crystal Ball – Things that might change in the future

Step 3: Organise and Prioritise (10 minutes) Ask participants to begin sorting their notes into sub-categories. Draw simple guides on the wall or flipchart.

Wins

- Top 3 – Medal winners (draw a podium)
- Top 10 – Strong performers but not top three
- Personal Bests – Positive aspects still performing well

Bins

- Scrap – Must be removed or stopped
- Repair – Could work with fixes or improvement
- Redesign – Requires a fundamentally different approach

Crystal Ball

- 1 year – Near-term changes
- 2–5 years – Medium-term changes
- 5+ years – Long-term possibilities

Step 4: Share and Discuss

Begin a group sharing session.

- Invite someone to start (ideally not the most senior person).
- Participants place their notes on the wall and briefly explain each one.
- Group similar notes together and encourage discussion where interpretations differ.

Avoid jumping to solutions.

This activity is about exploring the situation and surfacing insights, not solving the problem yet.

CALM Persona

Project: .... Date: ....

Caricature (incl. name)

- **About:**

- **Logjams:**

- **Motivations:**

Understanding Tool: CALM Personas

Humanise the problem by giving your typical user a name and face.

What is it?
A persona is a fictional character that represents the shared traits, behaviours, needs, and goals of a group of people. The persona should be built from real insights gathered during the Discovering phase, combining common patterns from the people you spoke with. Avoid stereotypes. The persona should reflect evidence and patterns, not assumptions.

Why is it useful?
A well-developed persona helps the team stay focused on the people the work is intended to help. It acts as a stand-in for real users, keeping discussions grounded in real experiences and needs. It also protects the anonymity of individuals who contributed insights during discovery.

When to use it?
Personas are most useful during the Understanding phase, once you have gathered insights about people affected by the issue. Often multiple groups may be involved, but the goal is to identify one or a small number of key personas that represent those most central to the challenge.

How to use it?
Create the persona on a single page using the CALM framework:

Caricature
Give the persona a name and a visual identity. This creates a memorable reference point so the team can easily talk about the user throughout the process. Include a short quote that captures their perspective.
Ensure the persona reflects real insights, not stereotypes.

About
Describe the context of their situation. Rather than focusing heavily on demographics, explain:

- Their environment
- What their day-to-day situation looks like
- The circumstances surrounding the issue

Think of this as the short “about” section of their profile page.

Logjams
Identify where the persona gets stuck. Describe:

- The challenges they face
- The barriers preventing progress
- What the problem stops them doing
- What extra effort or workarounds they must create

This helps clarify the issue from their perspective.

Motivation
Explain what they are trying to achieve and why.

Consider:

- Their goals and desired outcomes
- How important solving this problem is to them
- What they are currently doing to cope or move forward

This reveals the drivers behind their behaviour.

Journey Mood Map

Project: .... Date: ....

Context & Persona	

Journey Phases:	1:	2:	3:	4:	5:	...
User actions:						
User emotions:						
Other actors:						
Information flow:						

User and other actors experience rating							
	+2						
	+1						
	0						
	-1						
	-2						

Understanding Tool: Journey Mood Map

Break down the user journey and understand how the experience feels at each step.

What is it?
A Journey Mood Map visually represents the full experience a user goes through before, during, and afterinteracting with a product, service, or process. It maps:

- The steps in the journey
- Who is involved at each stage
- How the user's mood or perception changes along the way

This helps reveal the moments that matter most in the overall experience.

Why is it useful?
Teams often focus only on the part of the experience they own or control. However, from the user's perspective, that piece might be minor—or critically important—within the broader journey. Mapping the entire experience helps uncover:

- Hidden friction points
- Disconnects between teams or processes
- The emotional highs and lows of the journey

When to use it?
Journey Mood Maps are particularly useful when exploring:

- Service experiences
- Complex purchasing or decision processes
- Multi-step systems or processes
- Experiences involving multiple teams, channels, or touchpoints

How to use it?
1. Map the journey phases. Start by identifying the major phases of the user's experience. Map the journey from:
- Before the experience
- During the experience
- After the experience

Write the key steps on sticky notes and place them across the top of your workspace.

2. Identify who is involved List the people, teams, or systems involved down the left side.
For each step in the journey, show:
- Who interacts with the user
- Where information flows
- How different groups connect (or fail to connect)

This helps reveal handoffs, gaps, or silos.

3. Track the user's mood

Finally, plot how the user feels throughout the journey.

Identify:

- High points – where the experience works well
- Low points – where frustration or friction occurs
- Make-or-break moments that shape the overall perception of the experience

These emotional shifts highlight the critical moments that deserve deeper attention.

Jobs to be done map

Project: .... Date: ....

Persona			
Situation			
Jobs to be done	**Functional jobs:**	**Social jobs:**	**Emotional jobs:**
Insights			

For more DUCTRI innovation tools see: www.innovationinactionbook.com

Understanding Tool: Jobs to Be Done

Understand what people are really trying to achieve when they use a product or service.

What is it?
Jobs to Be Done (JTBD) focuses on the progress a person is trying to make in a particular situation. As Harvard Business School professor Theodore Levitt famously said: “People don’t want to buy a quarter-inch drill. They want a quarter-inch hole.” In other words, people don’t buy products or services for their own sake—they “hire” them to get a job done.

Why is it useful?
This approach shifts attention away from solutions or product features and toward the underlying need. By focusing on the job someone is trying to accomplish, teams can better understand:

- The user’s situation and context
- Why existing solutions may fall short
- Opportunities to create more meaningful solutions

When to use it?
This tool is especially helpful when existing solutions are not fully meeting user needs. It allows teams to step back and ask: What job is the user actually trying to get done?

How to use it?
1. Define the situation. Start with a specific persona and context Ask:

- What situation are they in?
- What are they trying to achieve in that moment?

In Jobs to Be Done thinking, the situation often matters more than demographics or product categories.

2. Identify functional jobs
List the practical tasks the user is trying to complete. These are usually the most obvious or surface-level jobs—the things the product or service directly helps them do.

3. Explore social jobs
Next, consider how the user wants to be perceived by others. Ask:

- How do they want others to see them?
- What social role or identity does the job support?

These insights often reveal important motivations behind behaviour.

4. Identify emotional jobs
Finally, explore the emotional outcomes the user is seeking. Ask:

- How do they want to feel?
- What emotional benefit does completing this job provide?

Emotional jobs often reveal the deepest drivers of behaviour.

Example:

Consider someone going to a gym.

Functional job

- Improve fitness, strength, or health

Social job

- Connect with friends or feel part of a community

Emotional job

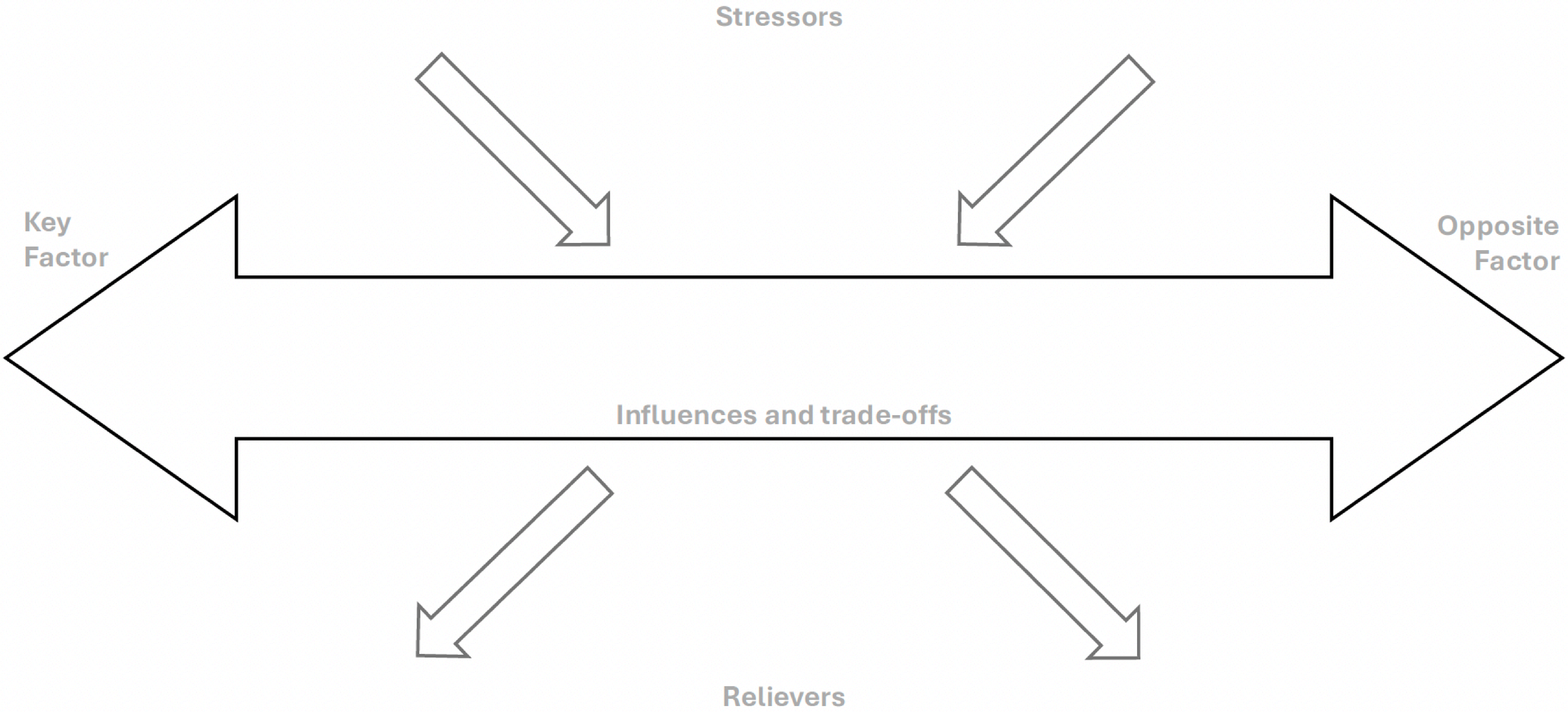
- Feel confident, accomplished, or relieve stress

Looking beyond the functional job often reveals much richer insights about why people choose certain solutions.

Tensions and Trade-offs

Project: .... Date: ....

Context & Persona	



Understanding Tool: Tensions and Trade-offs

Explore the opposing forces shaping a problem and where the balance lies

What is it?
The Tensions and Trade-offs tool helps identify factors that appear to be in opposition or competing with each other. Many challenges involve balancing two priorities that seem to pull in different directions. This tool makes those tensions explicit and helps explore:

- Where the current balance sits
- What influences that balance
- The trade-offs being made between competing priorities

It can also reveal external pressures that push the balance one way or another, as well as factors that help relieve the tension.

Why is it useful?
Many tensions in organisations are assumed rather than examined. By unpacking the trade-offs involved, teams can better understand:

- What is truly important in a situation
- What constraints are shaping decisions
- Whether the tension is real or simply perceived

This deeper understanding often exposes underlying causes and hidden opportunities.

When to use it?
This tool is helpful when a situation involves:

- Competing priorities
- Apparent opposites
- Conflicting goals or perspectives

Examples might include balancing speed vs quality, cost vs impact, or innovation vs risk.

How to use it?
1. Define the opposing factors. Identify two key factors that appear to be in tension. Place them at opposite ends of a horizontal continuum.

For example:
Speed ←——————————————→ Quality

2. Locate the current balance
Discuss where the current reality sits between the two factors. Questions to explore:

- Is the situation currently weighted toward one side?
- Is there an intentional balance being maintained?

3. Explore the influences
Identify what affects where the balance sits. Ask:

- What factors push the balance in one direction?
- Are there external pressures shaping the trade-offs?
- Are there elements that help relieve or manage the tension?

4. Examine the trade-offs
Discuss what is gained or lost depending on where the balance sits. Questions to consider:

- What trade-offs are currently being made?
- What trade-offs might be possible instead?
- What would the ideal balance look like?

Also challenge the assumption itself:

- Are these factors truly in opposition?
- Could both be achieved in a different way?

5. Capture insights. Document the key observations that emerge from the discussion.This process should reveal priorities, constraints, and underlying drivers that influence the situation.