We offer a wide range of consulting services, from visioning and strategy to detailed design and execution.

Phase II provides a mix of industry-standard practices with industry-leading approaches such as its highly acclaimed method, Presumptive Design.

We look forward to discussing our services with you and how we can work together to address your needs.
Phase II provides differentiated consulting services, from business strategy through product and service design to operational analyses. Our unique approach, Presumptive Design, rapidly brings your team through a complete design thinking cycle, to ultimately “throw the first one away” in service of finding key opportunities. Presumptive Design (PrD) identifies impediments to your success, before you’ve committed yourself, your project or your organization to a specific solution.

Phase II provides a full set of services, from initial discovery through definition and design to delivery.

Your challenges

Phase II reviews your key challenges prior to providing a proposal. In these initial discussions, we tease out what matters most, where we can add greatest business value, and how we can partner with you to our mutual advantage.

Phase II’s Approach in a Nutshell

Phase II embraces leading-edge design thinking models, including the UK Design Council’s “double-diamond” approach.
Phase II offers you several compelling advantages

**User-centered**
Phase II’s experience in user-centered innovation extends back more than 20 years. Whether it’s quick, “guerrilla-style” research or sophisticated quantitative studies, Phase II determines the “right-size” approach to address your needs.

**Design Thinking**
Phase II applies design thinking in all of its engagements. From business strategy to project execution, Phase II relies on established methods to discovery, definition, design and delivery - key tenets of the design thinking cycle.

**Cost Controls**
Phase II is completely transparent in its cost structures: Ultimately, you are in control of the cost of the work using Phase II’s Deliverables Worksheet. As you need to change the scope of work, you can easily update the worksheet to see its potential impact on costs.

**Knowledge Transfer**
Phase II provides all of its data, research and reports in source formats throughout the course of the project. In addition, Phase II offers training on any of its processes. Your team will continue to benefit from Phase II’s leading edge approaches without keeping Phase II on retainer.
Phase II’s Approach

Before Phase II begins any engagement, we discuss your specific situation. For example, if your challenges are in innovation, product strategy, or crafting world-class experiences, we learn what’s currently working and what’s not, establishing a scope of work that shrinks to fit the challenge. As we learn about your organization through these early discussions, we craft our deliverables accordingly. The root cause of a product design problem may reveal itself as an organizational issue, for example. Your circumstances may vary, but one thing remains constant: Phase II’s design-centric view to problem identification and resolution. The following pages offer details into each part of the cycle, indicating services, and their value, Phase II provides.

The Design Thinking Cycle

Phase II uses industry-leading practices and industry-standard processes of Design Thinking.

**Discover**
Deliverables include stakeholder interviews, data gap analysis, user observations, competitive analysis among others.

**Define**
Deliverables include customer journey maps, mental models, Personas, information architecture among others.

**Design**
Deliverables include Presumptive Design, prototyping, scenarios.

**Deliver**
Deliverables include navigation structure, site maps, wireframes, design comps and coordination with technical and business teams.
**Data Gap Analysis**
What do you already know about your users? How was that information collected?

Phase II summarizes its findings, identifying gaps to be filled.

**System Assessment**
Assess current and proposed technical platforms and systems architectures.

The assessment informs Phase II’s designs. There is no specific deliverable from this activity.

### Discover Process Overview

Phase II learns about your current technical environment and state of user research. Activities can include: deep dives into existing data sets, meetings with internal stakeholders, competitive analyses, system assessments.

**Primary benefit:** reduce the risks of misunderstandings. The Discovery phase improves Phase II’s understanding of your current business, technical and user contexts.

### Example Deliverables Estimate for Discovery

<table>
<thead>
<tr>
<th>ENGAGEMENT</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td>Data Gap Analysis - summary report</td>
</tr>
<tr>
<td><strong>6 (max)</strong></td>
<td>Stakeholder Interviews - Phase II use</td>
</tr>
<tr>
<td><strong>3 (max)</strong></td>
<td>“Competitive” analysis - summary report</td>
</tr>
<tr>
<td><strong>3 (max)</strong></td>
<td>System Assessment - Phase II use</td>
</tr>
<tr>
<td><strong>Duration</strong></td>
<td><strong>2 weeks</strong></td>
</tr>
</tbody>
</table>
Define Deliverables (selected)

**Persona**
Phase II subscribes to the canonical version of Personas, as promoted by Goal Directed Design.

Personas increase understanding and empathy of your users by all members of the organization.

**Presumptive Design**
Offer an “artifact from the future” to your users.

Through this design provocation we improve your assumptions about user needs.

Define Process Overview
Phase II develops and executes research to accomplish a shared set of objective. Activities can include: user observation, Presumptive Design and Persona Interviews.

**Primary Benefit:** reduce the risks of designing the wrong solution. The Define phase increases your organization’s confidence in your ideas and your understanding of your users.

**Example Deliverables Estimate for Define**

<table>
<thead>
<tr>
<th>ENGAGEMENT</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>9 users</td>
<td>User Observations, magnetics, interviews</td>
</tr>
<tr>
<td>2</td>
<td>Persona development - Persona package</td>
</tr>
<tr>
<td>1</td>
<td>Presumptive Design (Creation Session)</td>
</tr>
<tr>
<td>9</td>
<td>Presumptive Design (Engagement Sessions)</td>
</tr>
<tr>
<td>1</td>
<td>Presumptive Design - summary report</td>
</tr>
<tr>
<td><strong>Duration</strong></td>
<td><strong>6 weeks</strong></td>
</tr>
</tbody>
</table>
Ideal Roadmapping

Phase II facilitates “Ideal, Future, Now” roadmapping exercises.

The organization exits this process with actionable steps on which to execute.

Context Scenarios

These short stories offer insights into the Persona’s desired outcomes.

1. The system must be able to handle offline interactions during service interruptions.
2. These may involve unposted transactions.
3. The two weren’t certain of the proper way to cross the street. In their native Johannesburg, darting in front of buses was normal and expected.
4. Consider cross-cultural implications in a public space. Not all visitors will recognize the iconography. More important, the implications of ignoring signs will not be universal.
5. Gerard looked out the open window of the commuter train, thinking about the last issue he’d had at work.
6. As Kim and her friend enjoyed the natural surroundings, they both were interested in the names of the birds and pl
7. All of a sudden he had an inspiration and turned to
8. What did the icons mean.
9. 1. The system must be able to handle offline interactions during service interruptions.
10. 2. These may involve unposted transactions.
11. 3. The two weren’t certain of the proper way to cross the street. In their native Johannesburg, darting in front of buses was normal and expected.
12. 4. Consider cross-cultural implications in a public space. Not all visitors will recognize the iconography. More important, the implications of ignoring signs will not be universal.
13. 5. Gerard looked out the open window of the commuter train, thinking about the last issue he’d had at work.
14. 6. As Kim and her friend enjoyed the natural surroundings, they both were interested in the names of the birds and pl

Design Deliverables (selected)

Gerard looked out the open window of the commuter train, thinking about the last issue he’d had at work.

All of a sudden he had an inspiration and turned to.

The two weren’t certain of the proper way to cross the street. In their native Johannesburg, darting in front of buses was normal and expected.

What did the icons mean.

As Kim and her friend enjoyed the natural surroundings, they both were interested in the names of the birds and pl

Example Deliverables Estimate for Design

<table>
<thead>
<tr>
<th>DELIVERABLE</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenarios</td>
<td>3 weeks</td>
</tr>
<tr>
<td>Roadmapping</td>
<td></td>
</tr>
</tbody>
</table>

Design Process Overview

Phase II offers 14 different design services in the Design phase, ranging from standard wireframe, site maps and comps to future scenarios.

Primary Benefit: reduce the waste of “handoffs.” Phase II transforms the insights identified during the Define phase into actionable results.
Phase II manages the project throughout its development.

Phase II addresses the myriad of design decisions that emerge as engineering implements the design.

User Story Development

Phase II authors user stories collaboratively with product management and the technical team.

Through collaborative story writing, the needs of technical, user and business are accounted for.

Implementation Support

Phase II maintains the quality of the design by working throughout the execution phase. Activities can include: front-end coding, user story development, “just-in-time” design and rapid testing of proposed alternatives.

Primary Benefit: Improve the quality of the final result. Phase II assists in conforming the design to the actual engineering constraints, while maintaining the highest possible quality of the user experience.

Example Deliverables Estimate for Deliver

<table>
<thead>
<tr>
<th>DELIVERABLE</th>
<th>97 User Stories</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Design Implementation Tests</td>
<td></td>
</tr>
<tr>
<td>Duration</td>
<td>12 weeks</td>
</tr>
</tbody>
</table>
**Administrative Deliverables**

**Stakeholder Reviews**
Throughout the project, design and strategy proposals are put in front of you and your stakeholders for comment and approval.

**Project plan**
Upon commencement of the project, Phase II crafts a project plan outlining each of the activities, dependencies and key milestone dates.

**Primary Benefit:** Maintain quality control over the project lifespan. Through excellent project management, Phase II minimizes mis-understandings, improves agility and ultimately ensures the best possible outcomes.

**Example Deliverables Estimate for Administrative**

<table>
<thead>
<tr>
<th>DELIVERABLE</th>
<th>1</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stakeholder Reviews</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meetings</td>
<td>1x/wk</td>
<td></td>
</tr>
<tr>
<td>Duration</td>
<td>12 weeks</td>
<td></td>
</tr>
</tbody>
</table>

These activities occur throughout the duration.
Vision, Strategy, Innovation