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The design brief: inquiry into the starting point in a learning journey

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Abstract: The paper reviews an assessment regime for its capacity to engage university learners, enabling them to design radically new business offerings. We explore the effect of the briefing approach on defining the customer/offering match. This study is framed by participatory action research, where data draws on two distinctive module deliveries: one where the design brief asks learners to generate the offering first and then shape the customer segment. The second one supplies an archetype and asks learners to define customer first and then develop the offering. Our analysis reveals that learners' engagement with the design brief prompts an emergence of five patterns of learners' responses, leading to conclusions that the nature of design brief elements has an impact in shaping the overall learning. Moreover, going from customer to offering appears to generate better iterations between the two, overall leading to learners' engagement with the process not simply seeking an outcome.

Keywords: design brief, management learners, customer archetype, participatory action research

1. Introduction

Current debates in the UK business schools focus on learners' engagement and their experience of learning. As Kofinas (2016) asserts '[a]cademic engagement is closely linked to the assessment regime the students may experience in the duration of their degree.' Moreover, he argues '... in favour of an assessment regime that ... re-interprets the student's engagement with the unit as a journey consisting of learning incidents, which are summative and formative' (Kofinas, 2016). In this paper we review our assessment regime and reflect upon its capacity to engage our learners, whilst enabling them to gain know-how of how to design radically new business offerings. We explore the effect of the briefing approach on defining the initial customer/offering match. In particular, we reflect on how changes in the design brief have an impact on the learners constructing their response to the brief in their initial pitch and build on this process for the final submission. While we fully accept that the particular details of the brief impact on the resulting design, for the rest of this

paper we are standing back from those details (for instance with regards to the impact on wider society) to reflect on the educational impact of the process rather than the specific brief.

Every spring term, since 2008, our undergraduate management learners can undertake a final year elective entitled Managing Strategic Design. This module gives them an opportunity to experience a process that can result in truly innovative business proposals through integration of design practice within management education (see Figure 1).

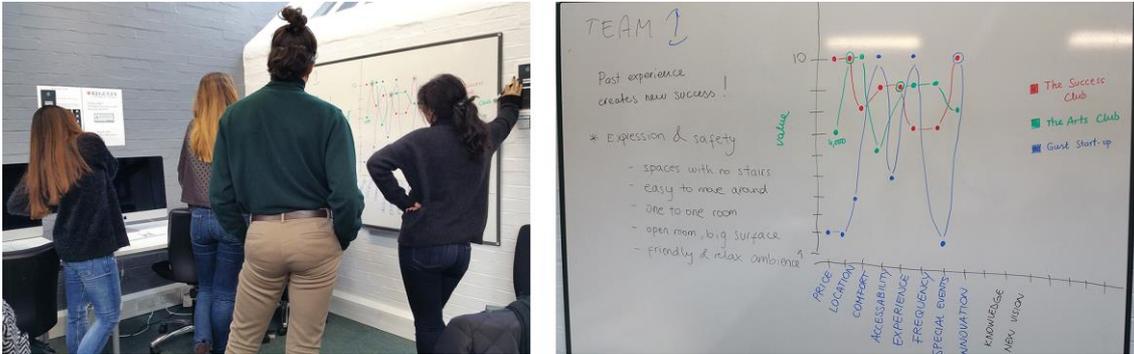


Figure 1. Spring 2016 students working through their initial proposal by applying the Strategy Canvas tool. The image on the right captures the finished exercise. (March, 2016)

To date the teaching supporting the module has been informed by concepts such as ‘comfort zone’ as a teaching and learning metaphor (Brown, 2008), the design thinking model (Brown, 2009), Blue Ocean thinking (Kim & Mauborgne, 2015), Strategy Dynamics (Warren, 2008), the Applied Empathy Framework (Knemeyer, 2006) and emotional design (Norman, 2004). The module is underpinned by a mix of formative and summative assessments enabling learners to imagine, design and develop a convincing business case for a future service. The learners are briefed to work in teams to produce a potential Blue Ocean opportunity for an innovative club to be based physically somewhere in London, UK. The nature of the club is very widely drawn, stipulating that whatever activity takes place with some or all members, must physically take place in a given space at some frequency. It must be innovative where most targeted customers would not normally go to this sort of club. There are some additional business constraints, however apart from those broad directions, the learners themselves must draw on their know-how of design process to generate appropriate frameworks to underpinning their proposals regarding the social, political, environmental and cultural impact.

This study is framed by participatory action research to ensure its academic rigour. Reason and Bradbury (2001) define participatory action research as ‘... a participatory, democratic process concerned with developing practical knowing in the pursuit of worthwhile human purposes’ (p. 1) ‘Action researchers reject the theory/practice divide and believe that applied research can both build theories and solve problems’ (Brinberg and Hirschman, 1986). Ozanne and Saatioglu (2008) argue that ‘... action research is demanding because researchers are expected to both develop knowledge and work toward social change’ (p. 424). It is an appropriate methodological choice as the investigation focuses on solving a practical problem, namely helping learners to unpack and develop responses to their assessment requirements, prompting possibility of transformational learning experiences. The research also enables us to observe and gain insights from the intersection of design practice and business management education, leading to emergent learning and teaching knowledge often found where different disciplines interact. The study pursues ‘... a spiral [of] self-contained cycles of planning, acting and observing, and reflecting’ (Kemmis & McTaggart, 2000, p. 595), which aligns with the participatory action research design. This research design is applied through reflection on module delivery to delve into issues identified in teaching. The analysis and

insights are then fed back into the next round of teaching, followed by further post-teaching reflection.

In the initial iterations of the module between 2008 and 2012, learners responded to the assessment by defining a possible offering and then moving onto defining appropriate customers. We observed that learners struggled with this approach and through reflection and experimentation with teaching methods we identified the need to adjust the design brief. From 2013 onwards, the reframed brief requires the learners to define their customer first and then identify a need to shape appropriate offering. Following this format, two pedagogical approaches were explored: (1) learners were given free rein to choose who the customer was (Spring 2013) and (2) learners had to flesh out a customer from a broad archetype initially captured by text (Spring 2014) then amended to an archetype represented only by an image (Spring 2015 and 2016). Figure 2 offer an example of an in-class exercise helping learners map out needs of their customers.

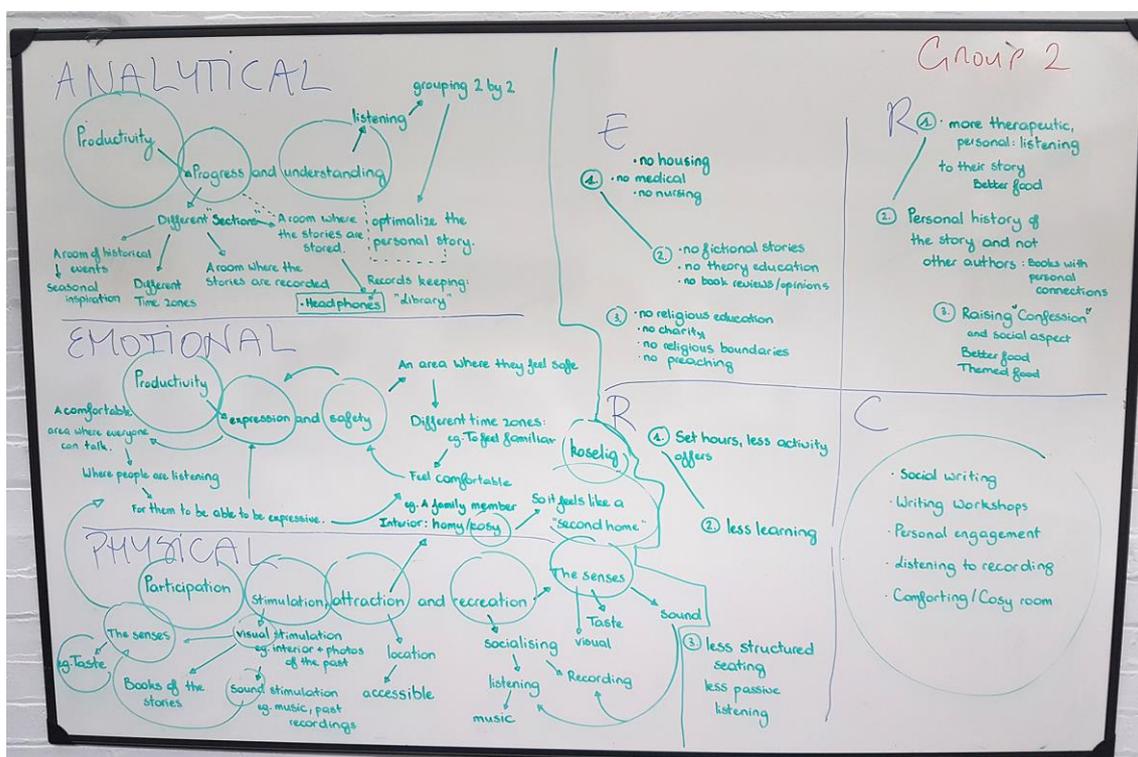


Figure 2. An example of one of the team's development of mapping out the needs and desires of their customers as broken down into three states of being (analytical, emotional and physical). These are then tested against the offering there are developing by applying the Eliminate-Raise-Reduce-Create Grid from Blue Ocean Strategy. (March, 2017)

For the comparison purposes, the below analysis explores data from module delivery in Spring 2012 (learners generating the offering first and then shaping the customer segment) and Spring 2016, where learners were given an image of an archetype to define a customer and then develop the offering. Each dataset has twelve attendees, all in their early twenties representing a wide selection of cultural, social and national backgrounds. The assessment is structured into a single project broken up into four waypoints: the brief, the initial proposal, the design mock-up and the business case. The datasets draw on learners' submissions and lecturers' feedback. The below table outlines how the datasets correspond to project waypoints and what each represents.

Table 1. Assessment project waypoints and datasets alignment.

Project waypoint	Data set	Description
Initial proposal pitch	Stage One	Learners' submissions for the initial business pitch
	Stage Two	Feedback given to learners on the first submission (feed forward to enable learners to reflect on lessons learnt and take them to next stage)
Business case pitch	Stage Three	Learners' final project submission
	Stage Four	Final summative feedback offered to learners on their projects

Although the structure of assessment in the chosen datasets follows the same broad pattern, there is a significant difference in the design brief in the two deliveries which sets out a useful comparison. The analysis compares the similarities and differences between stage one and three to map the role of the feedback in stage two and emerging response pattern to the design brief when comparing against stage four. Finally, the two cohorts are compared to identify if indeed a change in a single variable in the design brief can have an impact in the way learners unpack their assessment requirements and shape their approach to its resolution. The insights gained from this analysis are presented below.

2. The design brief: a trigger for a learning journey

Learners are expected to respond to the design brief by starting on a metaphorical journey consisting of several decision-making moments, feedback loops and their own reflections on these decisions. This format broadly follows a design process as defined by seminal works of Nelson & Stolterman (2003), Cross (2006) and Lawson (2006) of formulating, representing, moving, evaluating and reflecting. Moreover, it also acknowledges that this '... process consists of distinct yet interacting mental acts in which [learners] establish relationships with the real world with a view to creating ... [particular] outcomes' (Cassim, 2013). Here, both the assessment and learning process are triggered by a design brief. Phillips (2004) defines a design brief as '... a written description of a project that requires some form of design' (p. 1), containing project overview, its objectives, tasks, timeframes and outcome expectations. However, we argue that in the educational context, the design brief is just a starting point, a trigger for the learners to begin their assessment process as part of overall learning experience.

We agree with Dorst and Cross (2001), who observe '... the more time a subject spent in defining and understanding the problem, and consequently using their own frame of reference in forming conceptual structures, the better able he/she [is] ... to achieve a creative result' (p. 8). Thus learners are encouraged to use their brief as a platform to research into possible offering and customer mix and the underpinning logic that shapes the linking relationship. Moreover, Dorst and Cross (2001) argue that '... creative design involves a period of exploration in which problem and solution spaces are evolving and are unstable until (temporarily) fixed by an emergent bridge which identifies a problem-solution pairing' (p. 13). However, we have observed that in the learning and teaching context where the creative process is framed as an assessment, learners tend to develop a pattern of responses that helps them manage their engagement and frame their learning experience in time. As each waypoint of their journey is accompanied by a feedback loop, the initial design brief acts as a first prompt which effectively gets reinterpreted over and over throughout the duration of the

assessment. What we explore below is how the change in the focus of the brief impacts on the learners' process of framing of what is required of them for their assessment.

2.1 Spring 2012: shaping an offering followed by customer definition

Team 1 developed a street music production and acting studio club for young boys. The club was meant to offer fun activities as a substitute for gangs. In response to the initial feedback for stage three, the team maintained the original concept, but introduced a mentor/mentee relationship and an element of street dance to give it an innovative edge. Upon evaluation of stage one and stage three, we note that the team mostly iterated around the initial idea, and refined it to make it more focused, but still struggled with fully developing an underlying logic between customer and the offering.

The analysis of the stage two feedback reveals that learners developed a coherent offering and they understood how it would function or what was required to implement it. However, the proposed customer was still unclear and the feedback prompted them to reconsider their thinking, as noted '[i]s this intended as "black-only" club, or multi-racial/cultural, or white only? Any might work, but choose. Needs clarity on age ranges of boys involved (12, 16, 18?)' (T1 stage two feedback, 2012). The feedback comments indicate that the logic underpinning the initial proposition was being questioned to invite the learners to push their ideas further and to propose a more innovative business offering. The analysis of stage four final feedback indicates that learners reshaped their offering with small tweaks, but defining the customers remained a challenge. Although these learners could frame the problem leading to a new business offering, their understanding of the potential customers continued to challenge them. The stage four feedback suggests they struggled to extrapolate from the brief the logic that would frame their customers.

Team 2 initially envisaged a physical combat arena experience for frustrated office workers, giving an opportunity to rid themselves of anger through physical activities. In stage one, their main target was a frustrated male customer. In stage three, the team completely redesigned their offering and their customer to target female gamers by providing a mix of physical and virtual gaming arena. By trying to focus on the frustrated male stereotype the team found it difficult to create something differentiating them from current services. To address this challenge, the team chose a different direction that enabled them to implement lessons learned but also to address the problems.

Upon evaluation of stage two feedback, learners struggled with defining the problem that the brief set out. The feedback invites the learners to '...do more to flesh out the offering itself. It now comes across as somewhat of a Video Game +, using potentially expensive technology' (T2 stage two feedback, 2012). This team had identified two possible customers in interpreting the brief and offered pen portraits for them, where one of the customers was better framed than the other, adding somewhat to the confusion in interpreting the brief. Thus, the feedback asks learners to make concrete decisions to combat the vagueness of the proposal. Stage four feedback indicates that learners, upon reflection, chose to redefine how they understood the design brief and reframe their response captured, as in their final feedback '[a] brave decision to drop "Joe" and "Emily" after all that work and have the courage of your convictions to focus on "Princess_Mila94", and to a large extent your bravery has paid off' (T2 stage four feedback, 2012). In this case, the flexibility of the original design brief has enabled learners to 'learn from their mistakes' and to reshape their response. The trial and error approach in response to the brief has paid off and learners having experimented with the offering and the customers, have taken those lessons and reshaped them a lot more successfully in the final submission.

For stage one, team 3 developed a personal luxury event planning service for high income parents to facilitate bonding time with children and socialising with like-minded people. In stage three, the team repositioned the service to focus on networking events for high net worth individuals and dropped the family bonding side of the initial proposition.

Upon review of the stage two feedback as with the previous teams the learners broadly defined their business proposition and the customers, however they struggled with interpreting the brief's requirement for truly innovative approach, as captured in the feedback '[p]otentially interesting start, with some good feel for aspects of the customer, but what is the distinctive offering and delivery mechanism?' (T3 stage two feedback, 2012). However, in contrast to the other two teams, the stage four feedback focuses on unpacking the logic underpinning the operational elements of the submission. It appears that going through stage one and two has enabled the learners to make more concrete decisions as to their offering and the choice of their customers. Feedback in stage four indicates that the interpretation of the problem posed by the brief was resolved by learners identifying a way to explore the feasibility of the business offering, whilst maintaining its original essence.

2.2 Spring 2016: customer archetype followed by offering design

In stage one, team 1 developed an entrepreneurial club for high net worth retired individuals to review and invest in potential business ideas. In stage three, the essence of the initial idea survived, but scope was narrowed to retired people from the design industry. In addition, the offering included young graduates who had potential ideas for new ventures to meet with the retirees and benefit from their experience. Where the initial proposition had a kernel of an interesting idea, but needed to go further, the focus on the experienced designers and new graduates, in stage three, gave submission a far better focus and underpinning logic.

As the team's starting point is defined by the visual customer archetype, the feedback in stage two no longer prompts learners to clarify the basics about their customers, but rather the detail of logic is being questioned. The feedback focuses on the impact the assumptions have on the offering, for example: '[y]ou may well be targeting wealthy retired people, but you could be clearer what the package involves, with the costs and benefits' (T1 stage two feedback, 2016). Conversely the analysis of stage four feedback focuses on the broader context of the proposed business offering '[n]eed to be clearer on the competition you are facing, and what specific elements of them you will be countering and how' (T1 stage four feedback, 2016). The team is no longer prompted to refine the customer or their offering as such, but the underpinning logic of their proposal. In this case, the inclusion of the framing mechanism for both the possible offering and the possible customer as part of the brief has enabled learners to focus their efforts in creating more concrete responses in stage one and use the remaining time in refining both their offering and their customer for stage three.

For stage one, team 2 designed a photo club in a gallery linked to health concerns, which was then redesigned for stage three into multimedia gallery and night club aimed at 'night-owls'. The original proposal became anchored by one member of the team whose personal interests constrained the offering. To combat this problem the team refocused on seeking out a very different customer for a traditional gallery which led them to develop their final concept.

The analysis of stage two feedback demonstrates how personal assumptions can sometimes interfere with the interpretation of the design brief. In this case, the team instead of interpreting the requirements of the brief, redefined the brief itself to suit their own values as noted in this feedback example, '[e]nthusiasm for photography has got in the way with coming up with a truly innovative proposition – what is different from existing galleries? Seem to have bolted "healthy life" advice and

sharing on to a well-known and accepted gallery, without really exploring the benefits or implications of such a mixture.’ (T2 stage two feedback, 2016). The analysis of stage four feedback however reveals that upon reflection the team have recognised the difference in the requirements of the brief and used their initial response as a learning point. Thus, in this case having initially discarded the brief and then return to it in stage three, has helped the learners to understand the requirements of the project and how to ‘play’ with the restrictions and push their own personal boundaries as well as those of the project.

For their stage one proposal, team 3 developed a space where people with a range of different disabilities could participate in urban adventures. This was an interesting starting point, trying to focus on disabilities with a wide range of offers, but with the kernel of sharing and learning from each other in an adventurous type environment. For stage three, the team was good at trusting the process and refining their idea successively to focus on one disability (in this case visual impaired-ness) and building a community around that.

Stage two feedback indicates that the team could define their customer well however struggled to shape a focused offering to meet their needs: ‘[t]here are so many elements to your offer that has tended to muddy the effectiveness – focus on fewer’ (T3 stage two feedback, 2016). Further analysis of stage two feedback also reveals a different approach to interpretation of the brief positioning it as a trigger for a design process, as captured by this comment: ‘[y]our willingness to also see this more as a process and not be tied down to just one ‘correct’ answer will serve you very well long term. A number of possible options in the same space might work; you just need to think what is the most opportunistic combination between your segment and the offering. However, keeping it focused and striving for simplicity will serve you well in the long run’ (T3 stage two feedback, 2016). It is the first time we observed such an interpretation, where the brief is not perceived simply as a trigger for an outcome. Moreover the analysis of the stage four feedback indicates that such an interpretation prompted the team to balance more effectively the requirements of developing the offering with the definition of the customers. As noted in the feedback: ‘[t]here is clear thinking through of the linkages between elements and the way they relate to each other. Shows a great sensitivity to the context but also to the customer and the way the club responds to it’ (T3 stage four feedback, 2016).

At the end of the module delivery learners were asked to visualise their response to the brief by generating a timeline. The Figure 3 captures this timeline

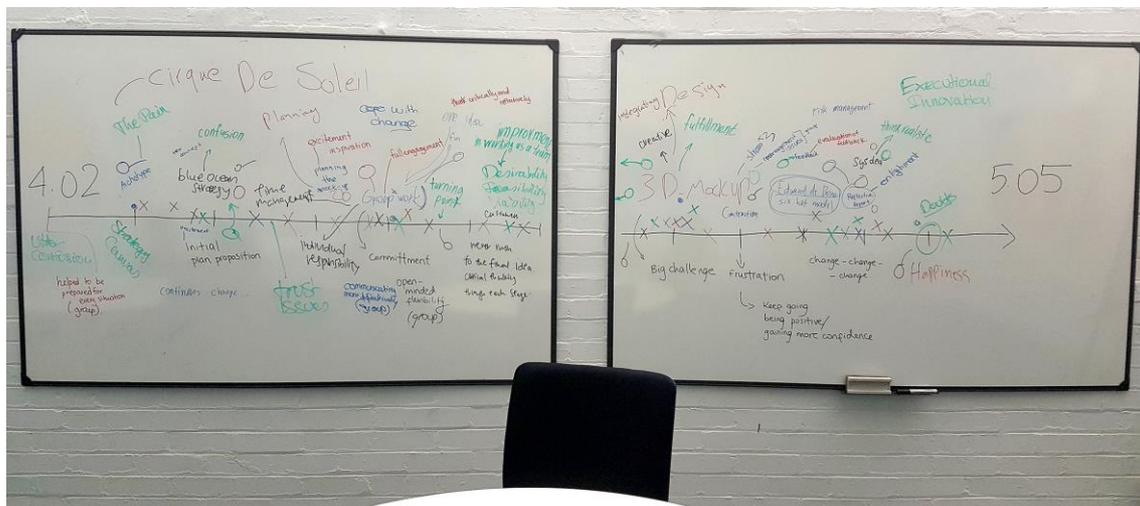


Figure 3. Spring 2016 learners’ timeline visualising their journey capturing their reflections on the response to the initial briefing. (May, 2016)

Our evaluation of the learners' engagement with the design brief indicates an emergence of five patterns of learners' responses:

1. ongoing refinement of offering and customer;
2. clear framing of the offering but issues around customer shaping;
3. trial and error iteration of offering and customer;
4. engagement in design process irrespective of the outcome;
5. disregard of the design brief.

We have observed that in 2012 (offering first followed by customer definition), learners tended to struggle with understanding of who the possible customers are. In this case, the analysis points to the emerging patterns of (1), (2) and (3) from the above list. We argue these emerge since learners focus predominantly on framing the design problem to arrive at its solution. They have an end goal in mind even if they are not sure what it looks like. Such an approach is often found as part of management learning and teaching, where learners are encouraged to shape their problems in terms of price, resource trade-offs and risk management. In such approaches, identifying a solution and mapping out ways to achieve it is a common problem solving approach. Although we recognise that the design brief requires iterative method, which is counter intuitive to linear process familiar to the management learners. We believe learners revert to the familiar ways to respond to what appears to be an unfamiliar set of demands prompted by the design brief.

On the other hand, in 2016 where the brief included the visual archetype alongside the offering requirements, a combination of (1), (4) and (5) from the above patterns emerges. Although as with the previous design brief structure, the inclusion of the visual archetype can result in learners simply iterating around offering and customers or applying the trial and error approach. It is interesting to observe the emergence of some learners completely redefining the brief parameters to suit their own personal interests. Although in our earlier work we have already recognised that team dynamics play a significant role in the way learners conceptualise this innovative process (Sadowska & Laffy, 2013), where the brief did not include the archetype the learners have never stepped outside its boundaries. Of course, it is quite plausible that this pattern of response is due to the particular team dynamics, but it is interesting to observe its emergence when the design brief defines the parameters of both the offering and the customer archetype.

The most surprising pattern has been that of seeing the design brief as a trigger of a process not an outcome. In all the iteration of the module delivery the context of the design brief as part of the assessment has always been defined as a process and to help learners understand this, hence a journey metaphor has been put in place. However, the 2016 delivery of the module captures for the first-time learners' ownership of this interpretation. Although the five identified patterns imply a form of process, in all cases the design brief is seen by learners as a trigger to deliver an outcome. Thus, it is interesting to capture an emergence of a pattern where the design brief becomes a trigger for a design process and accompanying learning versus arrival at an outcome.

3. Concluding reflections and further research

If we assess the skills and personal development of the two sets of learners studied, the later (2016) set appear to have gained more. The emergence of higher order interactions and reflections (in particular with regard to team 3), and generally better overall results imply a presence of learning gain. The term 'learning gain' has been defined by Higher Education Funding Council for England as '... an attempt to measure the improvement in knowledge, skills, work-readiness and personal development made by students during their time spent in higher education' (HEFCE, 2016). In the

case of our research, the process of our learners conceptualising their response to an innovation brief over time through series of tasks accompanied by feedback loops offers a possibility of measuring learning gain. This is where we argue lies an opportunity for further research investigating how learning gain might be measured more systematically in our module. More precisely, we see a prospect to question, which particular elements of knowledge, skills, work-readiness and personal development could we measure at the start, and end, and after the module to assess the learning gain. Thus we conclude that our investigation into the impact of the design brief has opened up opportunities not just to explore learners responses and underlying patterns, but also has provided a platform for further investigation into how learners benefit from these experiences, making it easier to understand the quality and impact of education this module offers.

To conclude we maintain that the design brief is just a starting point, a trigger for the learners to begin their assessment process as part of overall learning experience. However we argue that the nature of particular elements of the design brief do have an impact in shaping the overall learning. Moreover, going from customer to offering, rather than the other way round, appears to generate better iterations between the two, overall leading to learners engagement with the process not simply seeking an outcome. Gaining such insights enables us to review our curriculum delivery to develop more precise teaching methods that support this engagement. In particular, the emergent five patterns of learners' responses to the design brief provide useful insights for teaching and learning methods that make the assessments meaningful to learners and academics, resulting in '... enhancing student performance, inclusivity and learning (Kofinas, 2016).

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