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Finding the "So What?"
How to get to the Doteveryone Definition of Done

This is a pdf of a living document, last updated 12 July 2019. Also available as a [Google Doc](#).

This is a guide to creating practical and achievable recommendations. It sets out how to structure and approach focussed research projects, how to distil wide-ranging research into clear next steps, and how to share ideas.

Doteveryone projects include many kinds of research: qualitative, quantitative, field work, and prototyping. This document does not cover our research methods.

It includes the following sections:

1. Doteveryone recommendations

A Doteveryone recommendation is an understandable, memorable and achievable suggestion, directed at an individual, a body, or a sector.

Doteveryone makes three different kinds of recommendations:

1. **policy recommendations** - clear, actionable and succinct next steps for policy makers
2. **service recommendations** - prototypes that show how a service could be
3. **recommended new ways of working** - easy-to-use methods, tailored for different groups of users

When we give a recommendation, we are asking someone or a group of people to do something differently. Most of the time, people don't want to do things differently, so our recommendations have to be achievable, appealing and easy to understand.

It is difficult to arrive at a good recommendation. The following is an attempt to unpack how we do it.

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2. Observations, insight and recommendations

Moving through *observations* and on to *insight* will help you to refine and share your thinking.

PROBLEM   OBSERVATIONS   INSIGHT   RECOMMENDATIONS

Observations are observable themes and connections in the work. They should be able to be grouped, prioritised and distilled to set the focus for the next stage of work.

Insights draw on evidence and observations to explain the causes of the original problem. For instance:

- Tech workers need guidance and skills to navigate new dilemmas
- A comprehensive, person-centred evidence base is vital for innovation in social care
- UK regulators need to be empowered to hold digital technologies to account.

Recommendations are actionable and understandable suggestions, directed at an individual, a body, or a sector. They build on the insight and draw on the observations, but are clear and succinct enough to stand alone and out of context, if necessary.

For instance:

- Free wifi in every NHS building by 2018
- The UK needs an Office of Responsible Technology to build regulatory capacity
- Responsible businesses must monitor the unintended consequences of their products and services

Although we often develop our recommendations into more specific advice for policy-makers and delivery bodies, we are not a delivery body so usually stop short of creating detailed **strategies** or action plans.

How many recommendations?

If the work is very conclusive, then a single, bold recommendation is enough. Otherwise, aim for **no more than three recommendations**. Put the most important or practical one first; this is your hero - the *So What?* It's the point of the paper, the thing people will remember, and the thing the media will say we are calling for.

3. Structuring your project

Remember that the most important work is not writing the final report; it's the constant effort throughout the project to understand, to get to the point, and strip away distractions.

Clarity doesn't appear because you are a lucky genius; it is achieved through hard work and deep understanding. It's a bad idea to expect something extraordinary to happen at the very end of the project, when it's just you, a Google doc, and a deadline. Instead, structure your project to make it easy to refine your thinking and understanding and create regular opportunities that "force the moment to its crisis". Build sharing into the project plan, and make regular appointments to discuss your thinking with others.

Create check-ins

Make regular check-ins to share updates with other people at Doteveryone: explaining the latest thinking to someone who's not a subject-matter expert will help you identify what's important. And don't just list the research activities: talk about what you're learning and understanding, and look for feedback.

At the beginning of a project, it will take longer to share than at the end; don't worry, this is a natural part of research, and at some points your thinking will seem fuzzier or clearer than others. The point of sharing often is not to impress your co-workers, but to help you get to a succinct articulation that has been stress-tested and that we can all speak to with confidence.

Build in deadlines

Set deadlines for the end of your observation and insight phases, and leave plenty of space for writing up before the publication process starts.

Test often

Section 4 sets out the tests you should apply to work out when the project is ready to move to the next stage.

4. Useful behaviours

The following are ways of working that will help you make your ideas more shareable, more frequently.

Be a detective not a design-thinker

Behave like a detective and collect evidence, keep track of it, and isolate and examine the most important things.

Don't worry about the double diamond method of design thinking; don't go big and expansive for the sake of it - it's difficult to zoom back in and find what is really important when the evidence base gets too expansive. Instead, **find a trail and follow it.**

And to labour the metaphor, you're a detective not a bloodhound: get out of that rabbit hole before you get lost. Know when you have gathered enough to prove a point, and move on.

Value complexity, not complication

In *Living with Complexity*, designer Don Norman says:

> *"I use the word 'complexity' to describe a state of the world. The word 'complicated' describes a state of mind."*

This is a useful distinction. The *state of the world* is the problem you're solving; the *state of mind* is your understanding of it.

Even if you're exploring the most complex idea in the world, don't let your state of mind get too complicated; your job is to keep a clear head so you can navigate the complexity.

Map often

Don Norman goes on to describe complex things as having "many intricate and interrelated parts"; I'd add that many problems Doteveryone explores are also *in flux*.

"Intricate, interrelated and in flux" is a good way to describe a system or a set of systems; this is not the same as being messy, confusing or complicated. There is order in there somewhere; you just can't see it yet, so **constantly map evidence, observations and insight**.

You don't need to do anything fancy: create a shared deck to keep track of observations, write things on post-it notes and group them, or organise them in a spreadsheet, and then describe that grouping to someone else.

Fall out of love

Every researcher falls in love with their subject. This can make research very satisfying to do, but enormously difficult to explain. It can also make it difficult to spot the important or interesting insights, because everything looks so fascinating and attractive, and your infatuation can lead you a long way down an undesirable path.

Your intimacy with the material is not as important as your ability to explain and evidence your conclusions.

Ask yourself periodically: how would you describe the project if it ended tomorrow?

4. Tests

Knowing when to move on can feel very instinctive, but in reality there is a series of tests you can apply to give you confidence to get to the next stage.

Remember, your research project is unlikely to offer a definitive answer; the aim is to offer a starting point that sets others in a clear, understandable direction of travel.

As your project moves from observations to insight to recommendation, that direction of travel should start to emerge. If at any point you feel like the work is heading in the wrong direction, it's always possible to pull back a step. But if you try to head in too many directions at once, it's likely you won't get anywhere.

Start with Values

Root the work in Doteveryone's mission and values, and get into the practice of considering whether the project is bringing our values to life. Our values are:

- We value people's time and experience, and are impatient for change

- We turn complex ideas into accessible conversations

- We challenge the obvious and state the unsaid

- We respect the privilege of our position and try to use that privilege wisely to support and to challenge others, as appropriate

The Doteveryone definition of done

You can test for whether the work is realising our values by asking these questions:

1. Does the thinking **set out a clear challenge** to a specific person, organisation or sector?
2. Is the work **shining new light on a complex problem**, not just restating accepted truths?
3. Are the proposed solutions to the problem **achievable** by the person, organisation or sector we are asking to create change?
4. Is the supporting work **understandable and succinct**?
5. Have we **given credit** where it is due?

By the time you get to the "insight" stage, the answer should be "yes" to three of the five questions above.

By recommendations stage, the work should meet all five criteria.

4. The *So What?*

The *So What?* is the ultimate expression of our values: it is a bold, clear and actionable recommendation that radiates intent.

Understanding whether you've achieved the *So What?* is the final piece of quality assurance before you start writing up the final report. If a piece of work passes all five of the tests in Section 3, it will be well on its way to delivering on the *So What?*

To reiterate, **the *So What?* is the most important, or immediately actionable recommendation in a piece of work** - it's the point of the paper, the thing people will remember, that we'll say we're "calling for" in a press release.

You'll know when you've got to the *So What?* because, when someone asks you what you're working on, you'll be able to answer in less than ten words. You might feel an itch to go ahead and make the change you've outlined, but you will also feel like that part of the work is definitely done.

If you're not sure whether you're at the *So What?* yet, apply these tests to your most important recommendation:

- The point of the work can be **expressed in a single phrase or sentence**

- The meaning of the recommendation should be **unmistakable and set the direction** for the rest of the project. Read this by Elizabeth Ayer on "radiating intent".

- The recommendation should present a **clear choice**: the opposite should also be plausible. Read this by Russell Davies on why a good strategy is a choice.

- It should **not contain any jargon or buzzwords** that need to be explained.

- It should be **easy to access, read, hear, or understand.**

- It should be the thing that a journalist can say we are calling for: an Office of Responsible Technology; shared data standards in social care; financial safety nets for gig economy workers.

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Why do we care about the *So What?*

There are two reasons we care:

1. Because of Martha
2. Because of who we are.

So What? is a variation of the first question Martha asks when talked through a project. It's often more eloquent - "What happens next?" or "What will this change?" or "What are we going to do about it?" - but it always makes it clear that admiring or describing a problem won't lead to any immediate change.

We also care because we are a small charity that exists to create change; we don't have time to waste, and we don't expect that others do.

After all, life is too short for boring documents that don't change anything.

6. Format and words

When we publish recommendations, we are giving our ideas to others and asking them to do something with them. And because changing the world is hard work, we should never ask anyone to work hard to read or understand our documents.

We should choose our words and formats so that it's easy for others to act on what we have to say. Remember that lots of people who make important decisions are short on time, preoccupied by a thousand other things, and they probably also wear reading glasses.

Format

When we format documents for those people, there are three simple rules:

1. **Don't make them think**
   Imagine your most important reader is being briefed while walking to a meeting. They have five seconds to understand the idea. Make it stick in their mind.
2. **Don't make them squint**
   Make it easy to read, and let the most important points fit into a glance: 6-8 words at most - even better, make it short enough to go on a sticker
3. **Don't make them print it out**
   Organise the content so it is as easy as possible to navigate and get to grips with: make it readable on a phone, while someone is standing up on a train.

Words

Don't make people think about the words you have chosen; help them to understand the *ideas* you are sharing.

Be confident and urgent, not pretentious and meaningless.

I've been trying to think of a good set of principles to guide this, but George Orwell said it best in *Politics and the English Language*:

1. Never use a metaphor, simile, or other figure of speech which you are used to seeing in print.
2. Never use a long word where a short one will do.
3. If it is possible to cut a word out, always cut it out.
4. Never use the passive where you can use the active.

5. Never use a foreign phrase, a scientific word, or a jargon word if you can think of an everyday English equivalent.
6. Break any of these rules sooner than say anything outright barbarous.

(More about active and passive voices in <u>English Grammar Today</u>. This is important and worth reading.)

Some specifics

We. Never use "we", "our" or "us" in reference to society as a whole. The only admissible use of "we" in a Doteveryone document is to refer to activity that Doteveryone is doing.

Key. Unless your document is about opening doors, go through and take out every instance of "key" as an adjective. Remember, be important, don't sound important.

We believe, we think, we contend - take these out and see if it makes sense. Of course we believe it; it's why it's in the document. Be confident and urgent.

Use -ly adverbs sparingly, so they offer meaningful amplification when you need them. Allowing everything to "greatly accelerate", to "rapidly move" or be "merely episodic" is like turning every observation up to 11; tone down the casual comments so the most important ones can be heard.

Limit yourself to four or five (at most) uses of "therefore", "as such", and "this means" in the entire document. Say the thing you need to say, don't add in words that let people know you're about to say it.

Finally

When you have finished both the first and second drafts of the Executive Summary go through and **remove every word that is not vital to conveying the sense.** Look for spare instances of "do", "be", and any extra prepositions; phrases like, "We will do this by" can almost always be removed if you rewrite in the active voice.

To paraphrase Elizabeth Ayers' great blog post again, the Exec Summary must not ask for forgiveness but radiate intent. There will be time to relax in the body copy - use metaphors, make jokes, show off your wide-ranging vocabulary - but the first page or so should be as lean and purposeful as possible; every word should earn its place.

7. Structuring a report

The Executive Summary

The Executive Summary needs to do what the name suggests: summarise your document for executives (or, indeed, anyone who is short on time or attention). And because it's the only part of your document most people will read, it needs to work extra hard.

As such, even though the Exec Summary is at the front of the document, it should be the very last thing you write. It should radiate confidence, as well as intent.

> **Paragraph 1:** Summarise **everything** in as few words as possible, and explain the underlying research methods in one sentence or less
>
> **Paragraph 2:** Unpack why your readers and any named or specific groups should care about this, and how it relates to Doteveryone's mission
>
> **Paragraphs 3, 4, and 5:** Tell your readers what to do about the problem - each paragraph should relate to a recommendation
>
> **Paragraph 6:** Explain how to start doing it now
>
> **Then** list your recommendations

This should fit into two pages, at the absolute most.

The Report

This is a starting point for structuring your report. You can vary it, but use this as a basis for planning:

> ★ Executive Summary (as above)
> ★ Section 1. Set why the problem is urgent and who for
> ★ Section 2. Research methods and findings - this is the only time you get to talk about this, although you will allude to it often
> ★ Sections 3, 4, and 5: One section per recommendation
> ★ Next steps and conclusion - note that the last paragraph of the document should be almost identical to the first paragraph of the Executive Summary

8. Summary

Doteveryone recommendations set out understandable, memorable and achievable starting points for solving complex problems.

Making these recommendations calls for constant focus on what is important. To achieve this, we:

- Move purposefully from wide-ranging research activities into forming observations and then developing insight
- Regularly share observations and insight through informal conversations and blog posts
- Spend time and effort turning our ideas into clear, shareable statements that others can use and feel inspired by

Everything in here is a guide, not a gospel. All good rules are worth breaking from time to time, but in all the work Doteveryone does we should remember how much we value our own and other people's time and attention. There is enough information in the world, too much for any one person to pay attention to, so everything we share with others should create change or help others to do so.

Good luck, and happy recommendation writing.