

openIDEO

Refinement Phase Toolkit

Refinement Checklist

Congrats and welcome to the Refinement Phase! We've collected some helpful tips and examples from past OpenIDEO Challenges to help you develop your idea. We understand that every idea is in different stages of development so we encourage you to take from this toolkit what's most relevant to you.

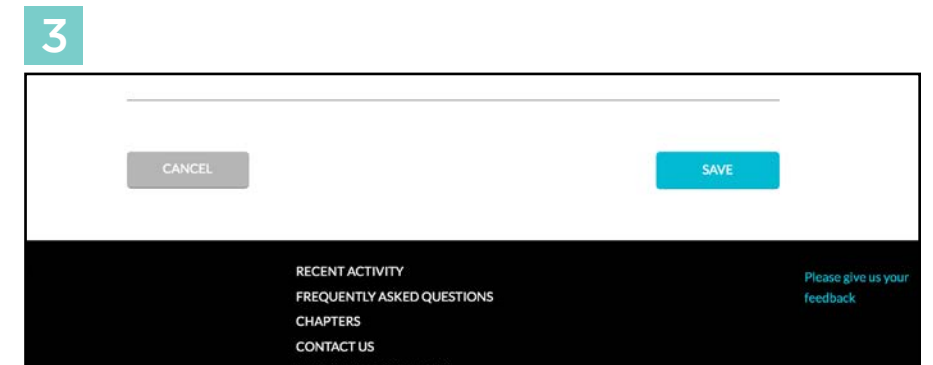
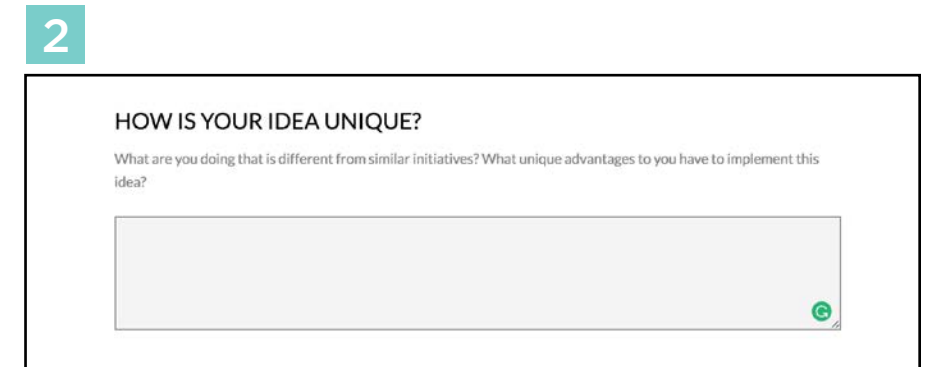
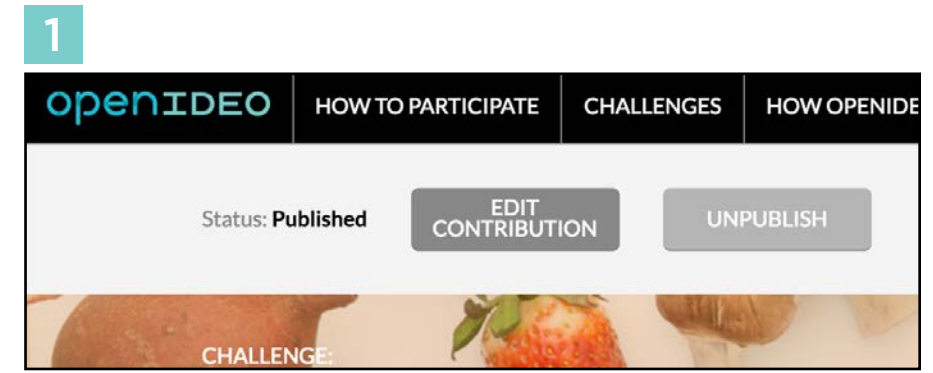
In the upcoming weeks, we're looking forward to how you might use the Refinement phase to narrow your focus, improve your idea with feedback and iterate beyond what you've been working on.

- [Answer Refinement Questions](#)
- [Format With Clarity](#)
- [Develop User Journeys](#)
- [Prototype a Small Piece](#)
- [Gather Feedback](#)

Answer Refinement Questions

We want to learn more about how your idea will address this Challenge. On the backend of your post we've added new prompts for you to tell us more about your idea. Follow the instructions below to answer the new Refinement questions.

- 1 Hit Edit Contribution at the top of your idea post.
- 2 Scroll down to answer the new Refinement questions.
- 3 Remember to hit Save at the bottom when you're done editing.



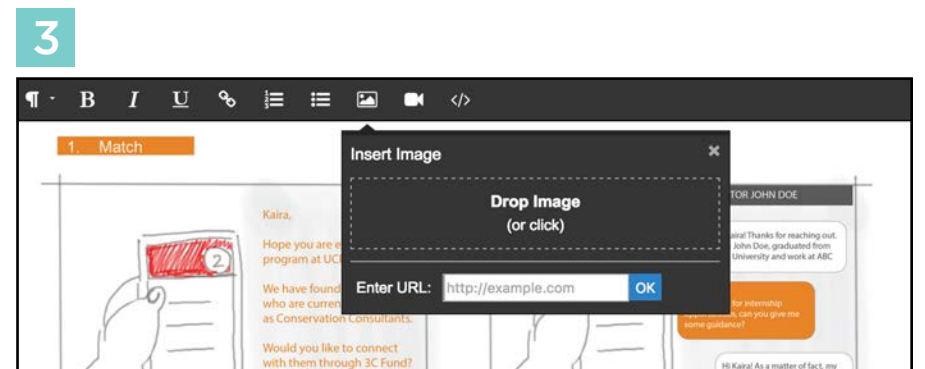
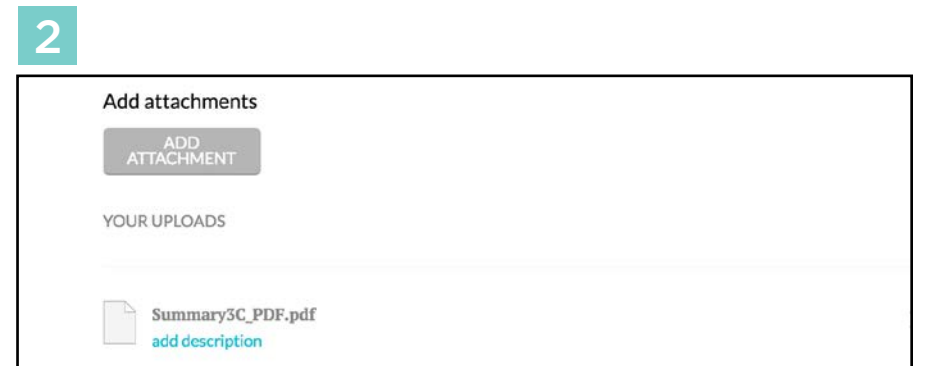
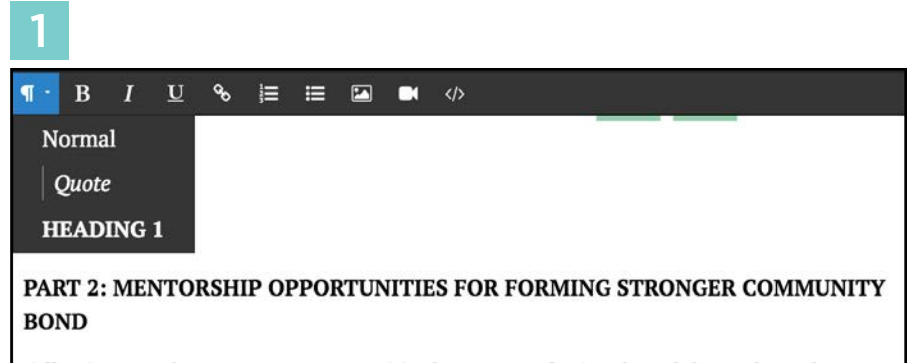
Format with Clarity

Imagine how your idea will communicate if someone only had a few minutes to read through it. Use the tips below to clearly format and present your idea before the Final Feedback Phase.

- 1 Highlight key areas of your idea by using bolded subtitles and headings.
- 2 Keep descriptions concise by adding supplemental material as attachments or with links to external docs.
- 3 Use visuals to support your descriptions. Insert key images to help tell your story.

Examples From Past Challenges

- [Long Term Ed Insurance](#)
- [Unbroke](#)



Develop User Journeys

Explain your idea in a human-centered way by creating a user journey. The user journey will help us understand who you're designing for and how your target audience will experience what you're proposing during key moments of your idea.

1 Use this [User Experience Template](#) as a starting point.

2 Bring your creative flair. User journeys come in different degrees of fidelity. Think storyboards, photo narratives, animations, and more.

Examples From Past Challenges

- [Vykarious](#) — *Notable user journey*
- [Biogas-Powered Milk Chiller](#) — *Notable user journey*



TITLE: CREATING THE MISSION

With his caregiver, Roger creates a mission. He has always wanted to hike Half Dome in Yosemite, but never got the chance. He decides he would love a photo from there, taken especially for him.



TITLE: AWARENESS (Mission Leader)

Roger's caretaker introduces Vykarious to him. She wants Roger to continue feeling human connection and engaging with larger communities in spite of his physical and geographic limitations.

Image Credit: [Vykarious](#)

Prototype a Small Piece

The Refinement phase is an opportunity to answer questions about how well your idea will meet the needs of real users. We encourage all ideas to narrow the scope and focus on testing out a small piece of what's being proposed.

- 1 Identify questions you want to answer about your idea.
- 2 Determine what's the best way to [create a simple prototype](#).
- 3 Document your prototype and share it with us.

Examples From Past Challenges

- [Prototyping Ideas for Fighting Ebola Challenge](#)
- [Prototyping for Women's Safety Challenge](#)

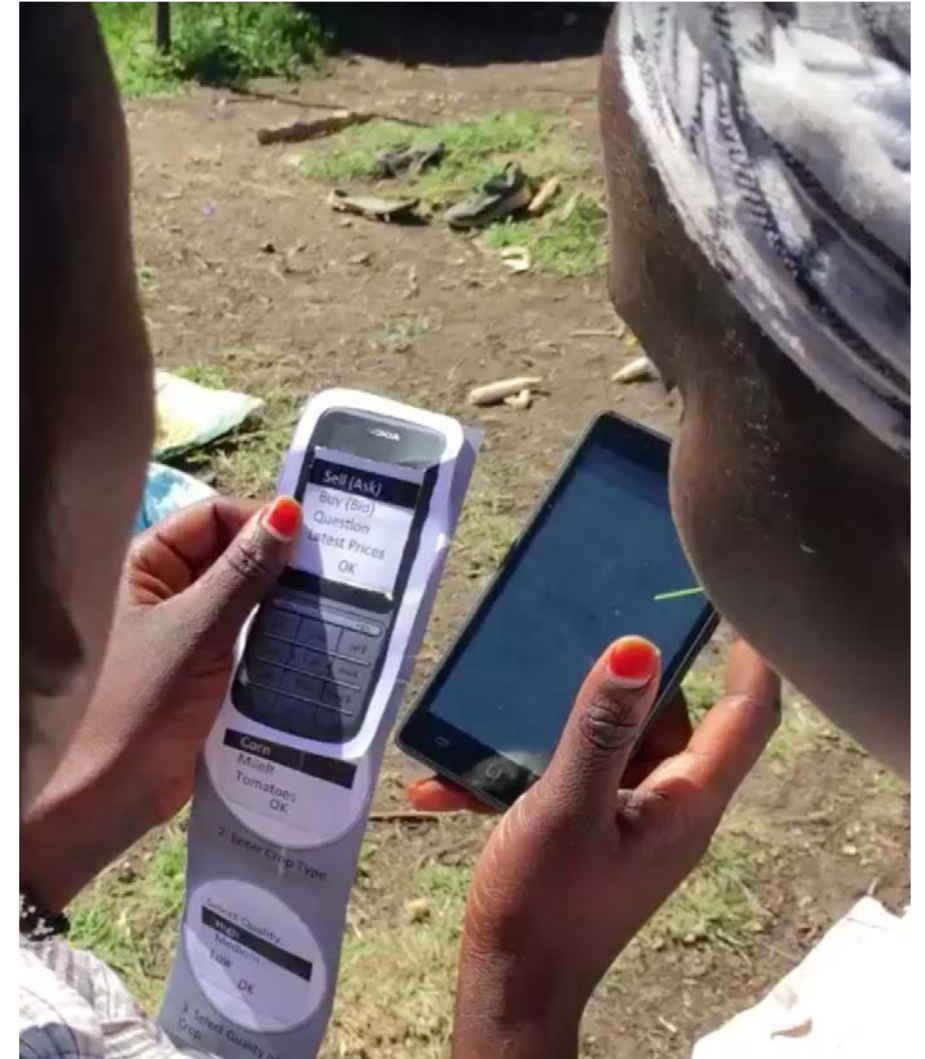


Image Credit: [Markit Opportunities](#)

Gather Feedback

The Refinement phase is also a valuable time to learn what works and what doesn't. We're looking forward to how you might integrate feedback to improve your idea.

- 1 [Tips for Collecting and Integrating Feedback](#)
- 2 Share key learnings from the feedback you've collected.
- 3 Identify next steps and opportunities for improvement.

Examples From Past Challenges

- [Markit Opportunity](#) – *Beneficiary feedback video*
- [Prototyping for Women's Safety Challenge](#)



Image Credit: [When I Die, I Wanna Be](#)