

# Using a Napkin Pitch to Modernize a Learning Strategy

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*Knowledge results from the combinations of grasping and transforming experience.*

David Kolb

The napkin pitch is a framework for communicating a concise summary of an idea or concept. Using this style to describe your ideas or strategy for a new concept can ensure that the description stays simple and short. The napkin pitch as a design thinking method is from Darden's tool portfolio and is adapted from Dan Roam (*Back of the Napkin* and other books).

**Purpose:** The goal of this activity is to describe in your own words, and in the context of the primary users, your interpretation of what needs to be done to meet their needs based on the insights gained from a review of data, research, etc. on modern learning. The focus is the component of modern learning you selected for the self-guided learning and from your own personal experience.

**Expected outcome:**

The outcome is a small group poster that replicates a napkin pitch format and has information related to an idea for incorporating components of one of the proposed topics:

- Chunked content
- Experiential learning
- Multimedia learning
- OnDemand learning
- Personalized learning
- Social learning

**Materials needed:**

- Completed experience records from the self-guided activity (each individual has one)
- Pens
- Easel Poster Sheets – one per group of 5
- Sharpie markers
- Sticky notes
- Template for a napkin pitch
- Predetermined topics related to approaches for modern learning

**Total Time for Lab:** 40 minutes

**Process:**

**1. Overview (8 minutes)**

The table facilitator should review the following information with the group prior to having them break up into their topical groups:

The purpose of this activity is to work in small groups to co-design a napkin pitch for incorporating some component of their self-guiding learning topic into a current learning strategy as part of the modernization process.

- **Set-up:** The large topical group will divide into smaller group of no more than 5 people for the napkin pitch activity. Using a poster sheet for each team, the small team will replicate the quads for a napkin pitch and label each quad.
- **The Big Idea:** The small group will use icons, words, bullets etc. to describe a summary of the big idea solution[s] you are recommending. How does this idea create value?

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- **User Desirability:** The next step is to document how this idea meets the needs or benefits the modern learner. Which of the attributes of the modern learner does it address? Describe how the solution seems to address a critical need for the user. What is the unmet need?
  - **Technical Feasibility:** In this quad the participants will describe, as much as possible, the operational abilities and challenges for implementing the solution. Does the organization have the right people, tools, and processes to implement the solution? The technical feasibility lays out steps for how this solution can be implemented.
  - **Business Viability:** In this quad the participants will describe how addressing this need will result in a net positive outcome for the organization. How will users and the organization benefit?
2. **Direct the participants to their respective rooms for the napkin pitch activity (20 minutes)**

There is limited time and the movement into the breakout spaces needs to be fast. Participants should post their completed napkin posters on the Facebook discussion group, send to Laleh ([lpatel@td.org](mailto:lpatel@td.org)), and, eventually, post on the wall. (Note: Because the participants will need to be with the topical groups from the self-guided learning activity the prior day, they will return to the same physical place.
  3. **Whole Group Discussion (12 minutes)**

Have several of the small groups – from different topical areas, pitch their concept and receive feedback from others.

### Notes for Facilitators:

According to Jeanne Liedtka at Darden, teams should develop several napkin pitches, at least three prior to moving forward with a proposed change. One of the goals for the pitches is to get feedback and to respond to questions. The napkin pitch is only one of multiple iterations for a design process, not **the** solution.

### References:

Liedtka, J., T. Ogilvie, and R. Brozenske. 2014. *The Designing for Growth Field Book: A Step-by-Step Project Guide*. New York: Columbia University Press.

### Template for the Napkin Pitch activity:

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Napkin Pitch to Modernize a Learning Strategy	
Topic:	Team Members:
<b>The Big Idea</b> Describe the concept/strategy using words, icons, etc.	<b>Usability (Needs/Benefits)</b> How will the stakeholder (modern learner) benefit? What needs does it serve?
<b>Technical Feasibility (Execution)</b> What does it mean for the TD function? What asset or capability does this require? What will we do differently to enable this proposal?	<b>Viability (Business Rationale)</b> What organizational opportunity or performance result does this proposal address? Is this proposal possible given the current operational capability, and, if not, what needs to be changed?

Sample from The Designing for Growth Field Book: A step-by-Step Project Guide:

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128 The Designing for Growth Field Book

## Napkin Pitch

CONCEPT NAME: America's Healthiest Company Contest

### The Big Idea

An employee weight loss contest, based on the TV show "The Biggest Loser"  
 Use nutritionists as coaches, senior management as judges  
 Make it social — create opportunity for whole company to be involved/share tips/encourage  
 Add incentives to get everyone involved — departments win along with their contestants  
 Build healthy activities and eating into the work day — open to everyone as well as contestants

### Needs/Benefits

Create fun and motivation through the fanfare and competition of the contest for unmotivated "I am who I am" label types  
 Build it into the work day for time-pressed "Tired Truly" types  
 Social dimension gets everyone involved  
 Weekly weight loss tallies will provide visible wins  
 Rewards success versus punishing failure

### Execution

Take advantage of electronic suggestion box to solicit entry forms  
 Company newsletter, announcements in gym, postings in cafeteria can all be used to promote the contest  
 Offer ongoing counseling to keep weight off  
 Can leverage existing wellness offerings to assist contestants  
 Partner with local Weight Watchers organization to provide structure and support  
 Partner with local organic grocery to feature healthy eating opportunities at work — and to carry home

### Business Rationale

Employee weight loss will improve incidence of diabetes, heart disease, and other weight-sensitive maladies, lowering medical costs  
 Healthy-weight employees may be more productive and energetic  
 Create a company-wide esprit de corps

EXAMPLE