

Co-design for DE&I Guidebook

By Naz Mirzaie, Diana Chun, Shelby Zink, Jeri Zewolday

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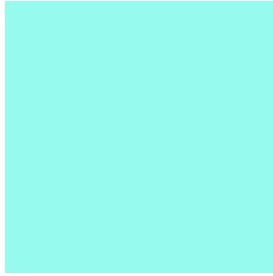
Introduction

Welcome to the Co-design guidebook! Our goal is to increase awareness and provide resources to help product makers understand and adopt the principles of Co-design in their daily work at Microsoft so that our work can meaningfully empower every person on the planet to achieve more. Microsoft's commitment to inclusive design aims to bridge the gap between products and the diverse needs of individuals.

The guidebook underscores the significance of incorporating underrepresented communities in research and design to prevent AI biases and ensure equitable product development. By intentionally involving people with lived experiences as stakeholders, Microsoft aims to create products that deliver value to everyone. We hope you find this guidebook helpful and encourage you to reach out with your feedback. Happy Co-designing at Microsoft!

The guidebook is organized into five chapters:

- **Introduction to Co-design:** Defines Co-design, touch upon the importance of inclusive practices, and the need for diverse voices, especially in AI.
- **Co-design Practices:** Explores different Co-design approaches across the product development lifecycle at Microsoft, from community-led processes to one-off activities.
- **Stakeholder Partnership:** Outlines a framework for engaging different stakeholder groups with varied identities and experiences, along with inclusive recruiting guidelines.
- **Workshop Best Practices:** Focuses on designing workshops with diverse participants, detailing roles, activities, and providing templates for effective Co-design sessions.
- **Measuring Success:** Aligns Co-design processes with Microsoft's broader impact goals, ensuring benefits for all involved through business, product, social, and individual metrics.



What is Co-design?

Co-design refers to the collective creativity of Co-designers to discover new insights and ideas throughout the product development process.

Co-designers refers to anyone who is collaborating in this co-design process, such as professional designers, individuals with diverse experiences (as untrained designers), and key stakeholders. They collaborate together with the intention of balancing power to build equitable relationships and decision-making.

At Microsoft, Co-design can happen with external participants, customers, people who will be impacted by our products, and internal team members, such as PMs, engineers, and data scientists.

Mindsets

Embrace diversity

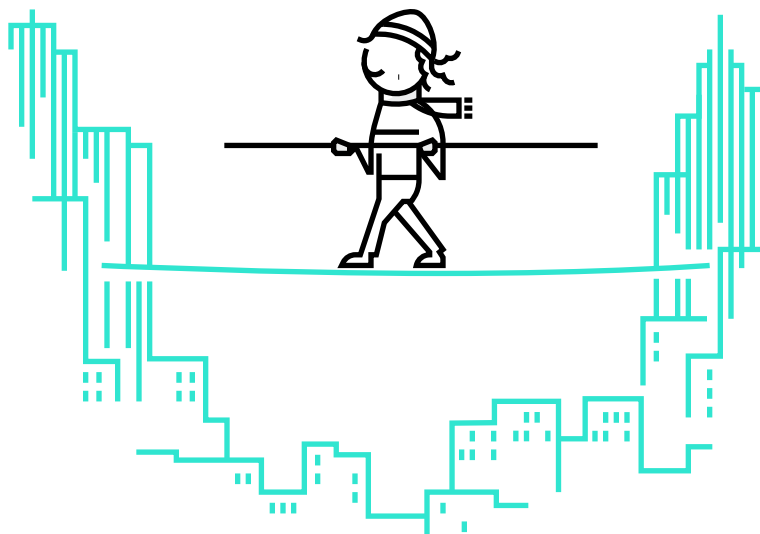
Include participants with diverse backgrounds to avoid oversampling historically dominant populations.

Rebalance the People's Voices

Include historically excluded populations to obtain a true picture of the needs of people with diverse lived experience and increase equity in our product-making decisions. ³

Foster Belonging

To avoid exclusion and disengagement, create diverse ways to participate.



Principles



Facilitate Creativity

Facilitators guide participants through the process while integrating their expertise. This requires flexibility, respect, and equity for all members aligning with DE&I values.



Prioritize Participation

The design process is adapted to meet the needs and aspirations of Co-designers, enabling them to actively contribute.



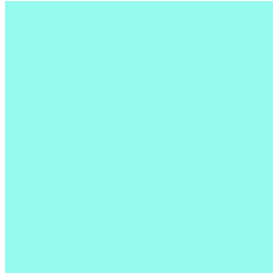
Share Power

Decision-making power is shared with Co-designers to promote equity and inclusion. True co-design actively involves people with diverse lived experiences throughout the entire design process.



Build Trust

Trustworthy relationships are built through transparent and open communication, ensuring respect for all participants. We must share clear motives, create guidelines that protect people from extractive interactions, compensate fairly, and make Co-design accessible and convenient for all involved.



Why Co-design?

At Microsoft

- **Build customer trust:** Talk with customers, share power, and be transparent to inspire loyalty.
- **Foster Innovation:** Use data and diverse perspectives to understand customer needs and create better outcomes.
- **Promote Collaboration:** Break down silos, build cross-disciplinary teams, and align with customer priorities.
- **Improve Decision-making:** Challenge assumptions, expose blind spots, and quickly vet and prioritize ideas.
- **Nurture Growth mindset:** Create environment for curiosity, openness, and experimentation to learn and embrace failure.

For diversity, equity and inclusion



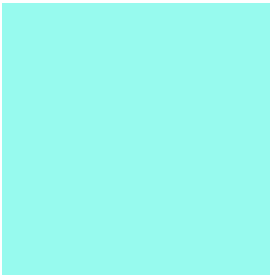
Mitigating bias

AI systems have the potential to reflect and exacerbate societal bias, and produce results that can disadvantage individuals, especially those already marginalized. By integrating a diversity of views that reflects a range of people with lived experience, we can diversify our data and avoid discriminatory and unfair algorithmic outcomes.



Reduce inequalities

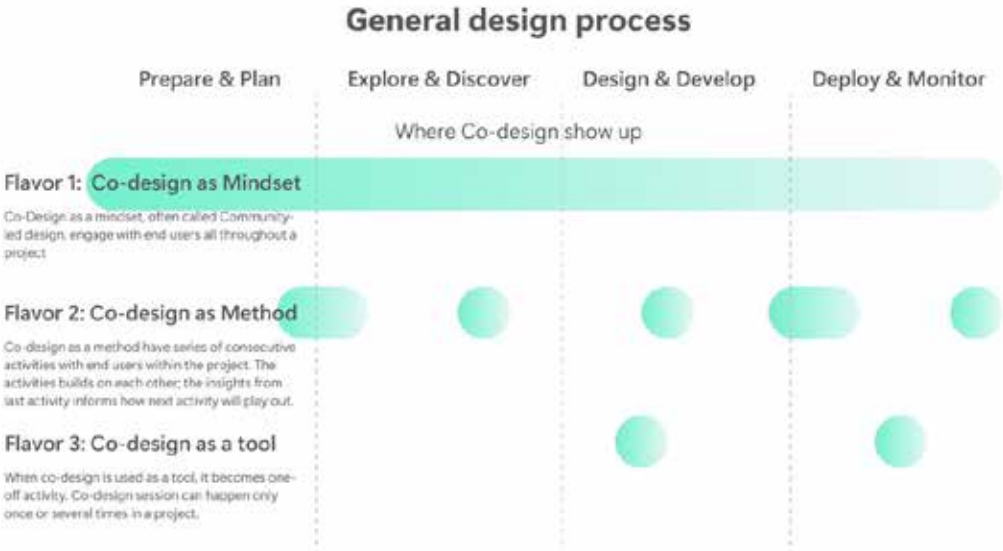
Digital access is becoming a basic human right for maintaining quality of life, access to basic care, education, etc. Prioritizing DE&I in product design ensures equitable access to everyone regardless of their race, gender, sexual orientation, background, abilities, or circumstances.



Co-design in the product lifecycle

Co-design in different flavors

Extensive community involvement throughout a project can significantly contribute to gaining rich insights and improving the chances of addressing the needs of the population. However, maintaining consistent community engagement may not be feasible for all projects due to constraints like resources. This chapter will examine how the level of community involvement can be adjusted to optimize the co-design process for your team.



Flavor 1. Co-design as a mindset

In the Co-design as a mindset flavor, the team collaborates with the community throughout the project. Known as Community-led Co-design, this method involves developing the process with community members (Co-design council) and maintaining engagement throughout the product development lifecycle. It empowers the community, ensures tailored solutions, and promotes equal control and collaboration. This approach suits teams experienced in direct community interaction and having allocated budget and time for co-design efforts.

Characteristics



“Scaling Down” approach⁵

Active involvement of individuals with direct experience in a democratic design process.



Design BY People

(vs. design FOR personas)

Embrace individual diversity, avoid biases, and create solutions grounded in real-life scenarios to truly understand people’s complexity.



Enhancing Assets

(vs. Minimizing Deficits)

Focusing on the development of individuals’ physical and psychological strengths while leveraging the capabilities of individuals and communities⁶.

Limitation

- **Resources:** These processes can be time-consuming and costly, possibly causing delays or budget issues.
- **Consensus:** Conflicting opinions may make it hard to reach agreed design decisions.
- **Knowledge:** Lack of expertise among community members can hinder effective implementation or meeting technical standards.
- **Scalability:** Community-led designs often focus on local contexts, limiting scalability.

Recommendations

- **Combines community and expert knowledge** to utilize both data-driven and conceptually driven approaches.

Considers historical and cultural context when designing complex socio-technical systems to maintain trust in automated technology outcomes.

Flavor 2. Co-design as a method

In the Co-design as a method approach, the team includes select Co-design activities in the product development process to meet specific priorities. This is suitable for teams dedicated to DE&I and community collaboration but facing budget, timeline, or dependency constraints.

Characteristics



Craft activities based on a mindset or principle

Choosing activities that incorporate diverse lived experiences, emphasizing principles like empathy and the value of non-designers. For example, regular team gatherings to share insights foster team-wide empathy.



Sequential application

Despite inconsistent community involvement, engagements are logically planned with an inclusive goal. This approach ensures insights build progressively throughout the process.

Limitation

- **Lower quality insight:** Reduced community engagement can diminish insights and affect decision-making and power dynamics.
- **Disconnect with community:** Long gaps in engagement may cause disengagement, and re-engaging trusted individuals is logistically challenging

Recommendations

- **Try to prioritize Co-design activities early** to ensure proper problem framing and time for insights. Review chapter 4's three connected activities as examples to build upon.

Flavor 3. Co-design as a one-off activities

In one-off Co-design activities, the team integrates tasks at different project stages. This method suits teams new to Co-design with limited budgets and timelines. It allows exploration of Co-design principles efficiently.

Characteristics



Limited resources

With limited resources, you can still integrate Co-design through small activities like journey mapping during stakeholder interviews or collage activities for early idea generation.



Active engagement

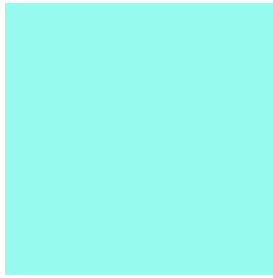
Even quick activities offer valuable insights. Co-design involves engaging diverse people to create artifacts like user personas and storyboards. Use prototyping and scenario generation to test solutions and ensure alignment with expectations.

Limitation

- **The project will not fully embrace Co-design principles** like participatory approaches, power-sharing, and trust-building with people with lived experiences. However, this limited exposure can be a starting point for future adoption.

Recommendations

- **Prioritize early Co-design activities** like understanding user needs, generating valuable ideas, and validating them in real-time if resources are tight.
- **Clarify the project's limited scope and impact** with co-designers to prevent misunderstandings and build trust.
- **Celebrate small wins and Co-design skillset growth of internal team** for their positive ripple effect.



Stakeholders

Merriam-Webster defines a “stakeholder” as “one who is involved in or affected by a course of action.” This reminds us to consider all individuals impacted by our design decisions.

Co-design project include various stakeholders like internal leaders, external users, sponsors, and clients. Despite constraints, including historically excluded community members is crucial. Consulting ERGs before recruitment and workshops helps engage intersectional and historically excluded participants effectively.

Mapping stakeholders

Keep the Co-design core group small to seven or fewer people help build relationship and trust. So how do you choose the right participants?

- 1 Identify those directly or indirectly affected by the problem or solution your team is addressing.
- 2 Consider categorizing your stakeholders into three groups: internal Co-designers, external Co-designers, and clients or sponsors. These categories can overlap and one individual can fall into multiple categories.
- 3 Map out as many groups/roles as possible. Include people with different titles and levels in your project team. Consider both their knowledge and value.



Knowledge

Combine subject matter experts, client team members, and those directly impacted by the solution.



Value

Utilize the 20 dimensions of diversity to broaden your team's perspective and enhance thinking.

Microsoft Internal stakeholders

■ Core Project Team

A cross-functional group creating human-centered experiences. Be mindful of team biases and educate yourself on the project's community. Example roles: designers, researchers, content writers, PMs, data engineers, data scientists.

■ Internal Subject Matter Experts

Professionals with relevant experience (e.g., a business leader with a disability) add value to your project. Representation boosts project success. Include accessibility pillars and other minority groups when possible. Example roles: Responsible AI champions, CELA for compliance, Accessibility experts, Controls Club, Customer connections, Advisory Boards, Microsoft research groups.

■ Microsoft Leadership

Higher-level managers and leaders who make decisions. Connect them with those impacted by the solution, build trust, and demonstrate Co-design's value.

External Stakeholders

■ Directly Impacted Individuals

Include current users/customers and potential new users, representing a range of perspectives from novice to expert. Try to recruit multiple individuals to represent the rich dimensions of people within one target community.

■ Community Liaisons

They bridge connections between product makers and the impacted groups. Examples are designers with lived experience or community leaders.

■ External Subject Matter Experts

Professionals with expert understanding of the problem's ecosystem. Examples are advocacy groups or university professors.

Clients/Sponsors (if applicable)

Some groups at Microsoft who work directly with clients need to consider a third group of stakeholders

- **Project Champion** Your main contact and advocate for the project.
- **Client Core Team** Cross-functional team members from the customer organization, including designers, researchers, content writers, PMs, data engineers, and data scientists. Be aware of cognitive biases and understand the project's subject area and community.
- **Client Subject Matter Experts** Consultants providing resources and insights to help understand the business context.
- **Client Leadership** Stakeholders who need to be kept informed.

Recruiting stakeholders

Start with inclusive research guidebook

Before recruiting, review the Inclusive Research Guidebook to complete your research plan. Plan participant recruitment using various methods and consider logistics like location, timing, and study conduct to avoid bias and ensure participant availability and interest.



Where

Consider the location of your study participants. Knowing the common versus less common profiles will help you gauge the ease of reaching your recruitment targets.



When

Schedule sessions outside of regular work hours, including weekends, to accommodate more participants. Take time zones into account.



How

Choose research methods thoughtfully. Online platforms require internet access, whereas phone interviews might be more inclusive.

Recruiting with DE&I in mind

Incorporating D&EI and Co-design practices into recruiting may extend timelines but offers valuable insights. Focus on oversampling affected groups often excluded from decisions. Building trust with marginalized communities takes time—prepare resources, connect with community liaisons, and attend local events. Align recruiting efforts and encourage your team to seek candidates beyond their usual networks.

Fair compensation for participants is crucial; incentives aren't just monetary. Here are some ways to compensate fairly and avoid an extractive model:

- Give ownership of produced materials to the communities.
- Educate on Co-design methods.
- Provide access to design tools and skills.
- Facilitate collaboration with the client team post-project.
- Assign equal responsibilities, like sharing results or running interviews.

Also, recognize and compensate internal Co-designers by providing positive feedback to their managers.



Internal Representatives

Co-designers should include both internal and external individuals from historically excluded communities, representing diverse genders and races. While internal ERGs are useful, engaging external participants is crucial. Internal stakeholders share unique Microsoft employee values that differ from external users' perspectives. Additionally, employees from these communities should not bear the full responsibility of DE&I initiatives; their experiences must be respected, and participation voluntary. Contact **cmallon@Microsoft.com** for assistance in finding Co-designers.

For a list of agencies and non-profit organizations that can support your recruiting efforts, visit the Inclusive Product Community.