



NUDGE THINKING

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1. INTRODUCTION

One of the main challenges of carrying out a Nudge project is precisely designing the approach. Many steps are required before a nudge can be indicated, so that we can isolate hypotheses, control variables, enable data integrity, among other necessary aspects. Nudge Thinking is a specific methodology for understanding and carrying out this entire process, both from the point of view of the creativity and reflection of behavioral scientists, as well as the observation and fulfillment of the necessary steps for a Nudge project. The combination of these two dimensions, which are often complex in practice, makes Nudge Thinking an innovative methodology for combining approach design, analysis and design. Innovation and ease to contribute to the dissemination of behavioral sciences.

The main differentiating element of behavioral economics is the complex nature of economic behavior. In practice, people are not always self-interested or constantly concerned with maximizing benefits and minimizing costs. We also make decisions under uncertainty with insufficient knowledge and understanding. All this happens because there are limits to our capacity for thought, access to information and time available.

This complexification of the understanding of economic behavior allowed for the creation of the concept of Nudge, which refers to initiatives that interfere in people's decisions without coercion, violence or rewards beyond the decision. After the publication of the book "Nudge: Improving Decisions About Health, Wealth, and Happiness" (THALER & SUNSTEIN, 2008), the concept gained popularity and many initiatives emerged - either as one-off interventions or as institutions committed to promoting Nudges.

This movement was accompanied by the need for scientific validation and the structuring of methodologies. NudgeRio, having experienced the singularity of being part of a municipal public institution that responds to the complexities of a city like Rio de Janeiro, had to build its own tools. The Nudge Thinking methodology is one of these important innovative tools developed by NudgeRio.

When faced with the operational difficulties between consultant and client in developing Nudge initiatives, it was realized that adapting ideas to the project structure would not be a spontaneous or simple process.

This transition has proved to be a major obstacle to the development of innovations in the public sector. Taking an idea out of the abstract and situating it in time, space and purpose requires technique and training. In practice, it's about plans, targets, timetables, budgets, resources, responsibilities, etc?

Inspired by the concept of Design Thinking, NudgeRio understood that it needed to take a human-centered, innovation-oriented approach. Beyond that, Design Thinking enables horizontal dialogue between behavioral scientists and project clients. This integrates scientific knowledge with that which is relevant to the contexts in question.

However, Design Thinking alone would not be enough to validate the process with data and evidence. Given that the efficient use of data to understand the context and support actions is an indispensable prerequisite for Nudge initiatives, NudgeRio emphasizes Data Thinking – the ability to understand, analyze and use data critically to make decisions – at every step of project development. This ensures that data is of central importance at every stage. This has enabled NudgeRio to combine Nudge Theory, Design Thinking and Data Thinking, based on the Public Policy Cycle, into a single methodology: NUDGE THINKING.

2. NUDGE THINKING

What have we decided to call Nudge Thinking?

NUDGE THINKING is a methodology that adopts a collaborative theoretical-practical approach. The conceptual foundation of this approach is guided by the theoretical and practical aspects of Nudges, the stages of Design Thinking and Data Thinking considering the Public Policy procedural cycle (figure 1) in the elaboration of public initiatives in governments. At this point, we need to explore more about how Nudge, Data Thinking and Design Thinking converge to elaborate and define NUDGE THINKING as the basis for developing Nudge projects that impact public policies.

FIGURE 1: REPRESENTATION OF THE PUBLIC POLICY CYCLE



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Design Thinking is a user-centered approach that operates in the logic of a toolkit that instructs us to integrate the needs of individuals with technological possibilities, taking into account the requirements of a business intended to be made viable. It is a process in stages, in which all the creation of solutions that meet the viability of an action, product, project or service takes place, namely: immersion; ideation and prototyping; and experimentation. In a nutshell, this means understanding, creating, testing and producing the final version to meet the established objectives. Some authors include a few more stages, but for our argument about NUDGE THINKING these were the ones considered.

Also noteworthy is the important fact that Design Thinking is a scientific process that establishes itself as empathetic. Which, in this sense,

configures itself as a catalyst for public agents' ability to reflect and build a knowledge platform. This logic integrates an understanding of individuals, their problems and how town halls can, where feasible, collaborate to improve their decisions on the issues they face. Citizens, when accessing public services, don't always realize that they can have their benefits maximized to the point of having more well-being produced by the social *ethos*¹ based on their decision-making processes.

This scenario is in line with the main concepts disseminated by Nudge Theory, such as Choice Architecture, Heuristics and Biases and the very definition of Nudge. In order to make Nudges, it is non-negotiable that we observe people's needs in order to create efficient behavioral incentives, as well as the idea of creating tools so that they can contribute to their decision-making processes and push them towards the best decisions and behaviors.

If Design Thinking talks to Nudges in theory, it's no different when it comes to creating projects. Design Thinking's orientation of trying, making mistakes and learning quickly is a substantial gain for making Nudge experiments less costly, especially since these failures are in the prototyping phase of the solutions. For Nudge Thinking, we condense the logic of successes and failures to the process of reflection and this is where we highlight Data Thinking, which expands our methodological capacity.

¹ A set of fundamental customs and habits, in terms of behavior (institutions, activities, etc.) and culture (values, ideas or beliefs), characteristic of a given community, era or region).

One of the premises of Data Thinking is that institutions have some data about what they work on, but often this data may not be converted into information. Data Thinking is precisely an approach for data-driven institutions. At the same time as addressing this issue, it acts in the medium and long term so that data, both internal and external, can play a fundamental role in an organization's sustainability. It leads to a vision of the future which, as a result, directs the decision-making of the managers and leaders of these institutions.

Data Thinking, like Design Thinking, also has some phases that contribute to achieving interesting results for an organization. These are: integration; exploration; models; and action. In other words, integrating existing data; asking creative questions that generate impact and have value in the institution's business model; creating methods, generating knowledge models and systematizing data; and, finally, indicating the investments and main actions that should be tried and tested by the organization.

Data Thinking also helps to direct researchers' reflections towards identifying a problem that affects people, exploring solutions with users as part of this construction, believing in the continuous improvement of final results and considering the fact that human beings, when making decisions, impute their opinion biased by their life experience. Data Thinking absorbs this aspect as a method in its phases and creates a balance of the team's interests in relation to the public problem, presenting a true optimization differential in being empathetic, collaborative and data-driven to arrive at more effective solutions.

No less nobly, it is worth noting that public policies are often

discontinued simply because there is a change of management. This can happen even when these initiatives are considered state policies by the population and long-term planning and require ongoing management. This discontinuity makes public leaders and managers feel frustrated and demotivated by this negative habit that is dear to the public sector, and this has an impact on the quality of their decision-making processes. Whether it's a mistake or a failure, Design Thinking and Data Thinking present methods of reflection in order to move away from the frustrating spectrum and towards the positive potential of our decisions, and thus provide results and solutions centered once again on the user we are interested in: the citizen.

It's important to note that this collaborative, theoretical and practical approach, which we call Nudge Thinking, was motivated by the idea of making it easy and effective for data scientists and behavioral scientists to work together methodologically to develop Nudges, leveraging the process and expanding the capacity of both to contribute their knowledge effectively. This is why Nudge Thinking was created, , even following the method of Design Thinking or Data Thinking, one of the biggest challenges encountered in innovation dialog environments is still the efficient use of data to support the actions chosen. The combination of knowledge from the behavioral sciences and data science results in a reduction in the limitations of building concrete ideas by translating the technological possibilities presented by data. This is a fundamental aspect of creating value for the project's target audience, which has been one of the main challenges of Nudges projects, which require transparency in the relationship with users. To deal with this challenge, a set of strategies used by designers during the process of creating new products and services was generated and this approach was formulated, linking Nudge, Design Thinking and Data Thinking.

Nudge Thinking is effective, in terms of its applicability, in the following three ways: immersion; a Theoretical-Practical Guide; and a creative documentation of knowledge. In this sense, we would point out that it can be used in a number of ways. There is a suggested order that does not necessarily have to be followed. But in all cases it is important to define the objective you want to achieve beforehand.

Immersion is used as a collaborative tool to engage stakeholders, behavioral and data scientists in the journey of designing or developing a Nudge project in an intuitive way.

In its Practical-Theoretical Guide form, it can be defined as a methodological guideline by which it is possible to plan, observe a process with a beginning, middle and end and arrive at a projected result.

Its applicability as a creative documentation of knowledge can be seen in the completion of the Nudge Canvas. In a simple and objective way, it documents the memories of each project, considering the stages and ways of reflecting on the necessary elements in a summarized way. The Nudge Canvas also acts as a record of the process of developing projects with Nudge theory, including aspects such as project ideation, intellectual abstraction, creativity and the biases of the participating scientists. It's very interesting to see how, over time, more objective and direct sentences are written into the project. Like Design Thinking and Data Thinking, Nudge Thinking is also presented in stages: integration; exploration; experimental model; intervention; and two more stages for analyzing application and governance projects. The analytical set based on the stages of Design Thinking, Data Thinking and the Public Policy Cycle is what we call Nudge Thinking the relationships can be seen in the figure below. FIGURE 2: REPRESENTATION OF THE RELATIONSHIP BETWEEN DESIGN THINKING, DATA THINKING



AND THE PUBLIC POLICY CYCLE.

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3. NUDGE CANVAS

Canvas is a model and a structured approach to planning strategies and processes based on design, providing an overview of the different elements of a process. Similarly, the Nudge Canvas is a tool for ideas and, moreover, for creating Nudge projects – which have various specificities, as we will see throughout the text.

The Nudge Canvas is the structural tool of Nudge Thinking and is constituted as an integrative model with the necessary stages and reflections for a Nudge project, based on the universal cycle, so to speak, of Public Policies that includes: the identification of the public problem, the formation of the public agenda, the solution proposals, the decision of the public manager, planning the execution of the public policy, implementation of the public policy and evaluation of the public policy.

The model is divided into four phases:

- 1. Integration
- 2. Exploration
- 3. Experimental Model
- 4. Intervention.



+ Vantagens: rapidez na construção de pensamentos integrados, facilidade para comunicar conteúdos de todas as fases de um projeto, garantia de clareza na inter-relação dos dados informados, além de designer inovador e criativo.

In the "Integration" stage, we connect our thoughts, intuitions, experiences and data to build a Nudge project idea that serves a specific target audience.

In the "Exploration" phase, we use the knowledge assembled in the integration phase to discuss the public problem that Nudge's idea aims to solve. In this phase the problem is discussed, the objectives are outlined, the hypotheses are set up, the assumptions are described, the information on these topics in the database is listed and the behavioral principles are associated.

The third phase, "Experimental Model", starts working on the design of the experimental approach. Here we begin to question the possibilities of replicating the Nudge project in other times, other institutions or other contexts. At this stage, the incentives of the public that will benefit from the intervention are listed and the flow of choices to achieve the benefit is outlined. The challenges, restrictions, appropriate types of intervention, the sample and, finally, the format for analyzing the results of the chosen intervention are identified. The fourth phase, "Intervention", defines the procedure chosen for the intervention based on the heuristics and biases outlined in the context. The intervention is also briefly described, specifying how it will be carried out, who will carry out each action and the expected timeline for these actions, as well as describing the results found in the control and treatment groups.

All the phases described above are related to the Public Policy Cycle so that we can generate more public value in the process of preparing projects with the nudge methodology in governments.

Usually the Nudge Canvas is printed in A0 format; in this manual we have a representation of the Nudge Canvas in A4 format, which makes it difficult to read. For this reason, we describe the Nudge Canvas frame by frame below.



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INTEGRATION PHASE (IN) - INTEGRATING KNOWLEDGE, DATA AND ANALYSIS INTO THE NUDGE PROJECT IDEA.

1. IDEA

Describe your idea for using the Nudge methodology.

2. STAKEHOLDERS

2.1) Describe the people or bodies you consider to be actively involved or to have negative or positive interests in the project.

2.2) Beneficiaries, Client, Project Manager.

3. REMARKS

3.1) Report important aspects that emerged during the reflection on the chosen idea.

3.2) If you have already taken part in an initial meeting, write down the main points discussed.

4. DATA SOURCES

4.1) Indicate which data sources will be used.

4.2) Indicate the institutions that may have specific data that qualifies the approach of your idea.

4.3) Indicate the institutions that present strategic data and governance: indicators.

4.4) Indicate theoretical references.

EXPLORATION PHASE (E) - UNDERSTANDING THE PUBLIC PROBLEM YOU WANT TO SOLVE

5. PUBLIC PROBLEM (E)

Describe the problem you want to address and require a solution with the Nudge methodology. Define the issue well.

6. EXPERIMENTAL QUESTIONS (E)

6.1) Define what the big questions are about the idea being presented.

6.2) Consider contextual aspects and aspects associated with the behavior indicated in the project idea.

7. ASSUMPTION (E)

Describe the thoughts or facts that led to the major issues surrounding behavior mentioned in item 6, in order to qualify or justify them.

8. DATABASE INFORMATION (E)

8.1) Describe categories of qualitative and quantitative information from the primary and secondary database fields you identified in the Data Sources listed in item 4.

8.2) Highlight data that can identify behavioral patterns by evaluating the database.

9. BEHAVIORAL PRINCIPLES (E)

9.1) List the biases and heuristics that can play a role in decision-making.

9.2) Describe which principles you will evaluate in this research

10. PROJECT OBJECTIVES (E)

10.1) Clearly present the objectives of the study: primary and secondary.

10.2) Use the SMART methodology (Specific, Measurable, Relevant, Achievable and Executable) as a basis for proposing in a possible and strategic timeframe.

EXPERIMENTAL MODEL (M) - MODEL THE EXPERIMENTAL APPROACH TO BE CARRIED OUT

11. CONTEXT (M)

11.1) Map the incentives related to the target audience.

11.2) Consider taking a route to the benefit. Check defaults and protrusions. Indicate the user's interests.

12. REPLICATION OF THE IDEA (M)

Is the proposed solution to the problem you want to solve replicable? Justify why. You can base it on certain strata or behaviors that are observable in the real world.

13. OPERATIONAL CONTEXT (M)

13.1) Let us know if the project's client institution is able to operationalize the experiment's processes.

13.2) Report challenges and limitations encountered in the initial approach to the design of the experiment.

13.3) Please state whether the project's client institution has the capacity to maintain the integrity of the data processed from the experiment.

13.4) Identify the assumptions, risks and restrictions.

14. HYPOTHESIS (M)

Define the hypothesis of the experiment - consider a statement subject to negation that can be measured in the intervention.

15. TYPE OF INTERVENTION (M)

Describe the types of intervention you want to test.

16. METHOD (M)

16.1) Indicate the analysis format of the chosen intervention.

16.2) Enter the Independent Variable - it is a determining factor as a condition or cause for a certain result, consequence.

16.3) Enter the Dependent Variable - this is the factor that tends to appear as a function of the condition indicated in the independent variable.

17. SELECTED SAMPLE (M)

- 17.1) Describe the experimental subject.
- 17.2) Describe sample planning (data and sample selection)
- 17.3) Describe the treatment and control groups.

INTERVENTION (I) - DEFINE THE INTERVENTION THAT WILL TEST THE STATED HYPOTHESIS AND RESULTS

18. INTERVENTION

18.1) Give a summary of the intervention.

18.2) Tell us who the experimental subject is, the team responsible, the sampling plan and the intervention chosen.

18.3) Indicate the specific causal mechanism that drives the outcome and choose a variable that will make a difference to the outcome.

18.4) Give the timetable for the actions of the chosen intervention.

19. RESULT

19.1) Describe the results of the intervention by treatment and control group.

19.2) Report on the effectiveness of the intervention.

19.3) Enter the result measures.

In addition to the Nudge Canvas, which serves as a guide the steps to be taken to realize a Nudge project, there are other tools that help to compose ideas and reflections.

Some examples of these tools used in Nudge Thinking are: Hanger of Ideas; HSCD Matrix; Actor Map; Creation of Personas; Empathy Map. These and others are used in conjunction with the Nudge Canvas to compose projects. The topic below explains in detail how everything is ideally put together.

4. NUDGE THINKING: STEP BY STEP

This Nudge Thinking guide can be used in two cases: when the Nudge project idea has already been created and also when this idea doesn't yet exist. In the first case, the Nudge Canvas is used to organize and integrate the project information in a synthesized way. In the second case, we use a series of Design Thinking and Data Thinking tools applied to the Nudge Theory concept.

However, even if the work begins without the existence of a formulated idea for the project, it is still important that all participants in the Nudge Thinking process have experienced a few hours of lessons on Behavioral Economics, Nudge Theory, Experiments, Sample Planning and Randomized Controlled Trials (RCTs).

4.1. GETTING STARTED

The trajectory for carrying out a Nudge project can follow several paths, such as meetings, moments of team reflection and immersions, as we will describe here. The following method can be adapted for virtual environments using Design Thinking applications, but here we consider it to be a face-to-face Nudge Thinking immersion process involving a group of four to six people. To do this, you will need some materials for the participants to work on their ideas and reflections:

- post-its;
- paper;
- pens;
- tables for groups of four to six people;
- chairs;
- adhesive tape;
- A0 print of the Nudge Canvas image;
- A3 print of the images from the other tools;
- presentation structure.

Let's go through the steps:	Come to Nudge Canvas	Activity Name	Duration	
1	IN	IDEA HANGER	9	minutes
2	IN	CHALLENGE	3	minutes
3	IN	CHOSEN SUBJECT	3	minutes
4	IN	PROBLEM	5	minutes
5	IN	HSCD MATRIX - hypotheses	5	minutes
5	IN	HSCD MATRIX - assumptions	3	minutes
5	IN	HSCD MATRIX - certainties	3	minutes
5	IN	HSCD MATRIX - doubts	3	minutes
6	1 (IN)	NUDGE CANVAS - idea	5	minutes
7	(IN)	MAP OF ACTORS	4	minutes
8	2 (IN)	NUDGE CANVAS - stakeholders	3	minutes
8	3 (IN)	NUDGE CANVAS - observations	2	minutes
8	4 (IN)	NUDGE CANVAS - data source	2	minutes
8	5 (E)	NUDGE CANVAS - public problem	2	minutes
9	(E)	HOW CAN WE - for whom	3	minutes
9	(E)	HOW CAN WE - who has the pain	3	minutes
9	(E)	HOW CAN WE - what we think	3	minutes
9	(E)	HOW CAN WE - what's the point	6	minutes
10	(E)	PERSONA	10	minutes
11	(E)	ΕΜΡΑΤΗΥ ΜΑΡ	12	minutes
12	(E)	TOOLS	8	minutes
13	(E)	CRISIS POINTS	3	minutes
14	(E)	DECISION-MAKING	5	minutes
14	(E)	DECISION MAKING - use of information	3	minutes
14	(E)	DECISION MAKING - help with decisions	3	minutes
14	(E)	DECISION MAKING - decision structure	5	minutes
15	6 (E)	NUDGE CANVAS - experimental questions	2	minutes
15	7 (E)	NUDGE CANVAS - assumption	5	minutes
15	8 (E)	NUDGE CANVAS - database information	2	minutes
15	9 (E)	NUDGE CANVAS - behavioral principles	2	minutes
15	10 (E)	NUDGE CANVAS - project objectives	5	minute
16	11 (M)	NUDGE CANVAS - context	3	minutes
16	12 (M)	NUDGE CANVAS - replication of the idea	8	minutes

16	13 (M)	NUDGE CANVAS - operational context	3	minutes
16	14 (M)	NUDGE CANVAS - hypothesis	5	minutes
16	15 (M)	NUDGE CANVAS - type of intervention	3	minutes
16	16 (M)	NUDGE CANVAS - method	3	minutes
17	17 (M)	NUDGE CANVAS - selected sample	5	minutes
17	18 I)	NUDGE CANVAS -intervention	3	minutes
17	19 (I)	NUDGE CANVAS - result	5	minutes
			170	minutes
		Your Nudge approach design in:	2,8	hours

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4.2. INTEGRATION

STEP 1: IDEA HANGER



The aim of this tool is to generate ideas for Nudge projects. In the image of three hangers, three Nudge project ideas are asked to be formulated in groups, each on a hanger. The goal is for the group to come up with three good ideas and three minutes are allotted for formulating each one, i.e. this phase should not exceed ten minutes.

People are asked to think about Nudge projects without worrying about detail, taking into account the theoretical knowledge they have absorbed so far. This is an opportunity for all kinds of ideas. Ideas should be written down briefly and placed on hangers.

STEP 2: CHALLENGE



After formulating three ideas in just under 10 minutes, now it's time to choose one of the ideas. You are asked to do this in two minutes.

Next, they use the "Challenge" tool to reflect on what the challenge of this idea is to be addressed with Nudges. They will then have three minutes to describe in one sentence a single challenge within the idea they have chosen. The purpose of this tool is to continue the discussion at a macro level, but already starting to carefully refine the project ideas, all in those three minutes.

If the wording of the idea chosen on the hanger was too detailed, you may have to repeat its text here

STEP 3: CHOSEN SUBJECT



After writing the sentence that determines the challenge of the project, the question to be answered in three minutes is: What subject within the challenge do we want to address? In other words, it's time to choose the specific theme or subject to be addressed. Where does the challenge apply? What specialization? In which area?

STEP 4: PROBLEM



It is noticeable that with each step the project becomes less generic. So far, we have specified what we want to solve. Now, in the "Problem" section, we describe the problem situation in which we want to change our audience's behavior. For this, five minutes are dedicated to formulating possible characters, indicating possible circumstances, narrating what the audience normally does in that situation. It's important to define the question well.



STEP 5: HSCD MATRIX

With this matrix, several reflections will be made. First, the participants will have five minutes to list two to three **hypotheses** (H) that explain the behavior the group wants to change. At this stage, we are not yet talking about the hypotheses that will be put to the test in the statistical analyses of the experiment. At the moment, they are simply phrases that are subject to negation.

The **assumptions** (S) (from the portuguese "suposições") will be formulated in three minutes. To do this, we will ask: why do you suppose that the hypotheses listed could be true? This will describe how the architects of choice, i.e. the group participants, formulated the hypotheses, enabling reflections based on subjective analyses that are not subject to denial, i.e. they will not be tested in the experiment.

This stage serves to capture the biases of the project participants. It is better to define them categorically so that we are aware of them than to pretend that we will not be affected by any bias. The idea is to choose one or more hypotheses and write down up to three assumptions for each.

The **certainties** (C) of the hypotheses should be listed in three minutes using as much of the existing data as possible. To capture the participants' certainties about the use of data, we ask questions like:

- How certain are you about the hypotheses you have developed?
- Have you ever heard anyone talk about it?
- Have you ever seen anyone do that?
- Have you seen any data on this?
- Where can I find information about this?

If any of the group members are already aware of any data relevant to the project, it is important to list it. If no one in the group is aware of data relevant to the project, but knows where to look for it, it is important to provide the source of the data.

The last stage of the matrix is the **doubts** (D) part , where we will have another three minutes to list any doubts that remain about the reflection on the hypotheses. Now is the time to put yourselves in the place of reflection, look at everything you've done, everything you've assumed and think about whether you have any doubts about the hypotheses you've formulated.

After filling in the four columns of the HSCD Matrix, the participants' model of thinking becomes clear, making it easier to indicate the project's hypothesis in the future. We would also like to point out that the experiment's hypothesis will be defined in later steps, which requires more detail on the context, data and sample planning.



STEP 6: NUDGE CANVAS - IDEA AND TARGET AUDIENCE

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Pasting Post-it on Canvas.

Everything that has been discussed and created so far will be used to start filling in the Nudge Canvas with two pieces of information: the idea (item 1) that will be developed using the Nudge methodology; and the main characteristics and needs of the target audience (item 1) for which the intervention is being designed. To do this, participants are given five minutes to read and reflect on the Nudge project idea they have developed so far and everything they have discussed on the subject in order to define the public that will benefit from the Nudge project.

Tip: Once the target audience has been defined, a search for information about this audience is indicated, which can be carried out through research, either in scientific articles or, depending on the urgency of the project, in-depth interviews with stakeholders.



STEP 7: MAP OF ACTORS

At this stage, the group has four minutes to inform all the institutions and other internal and external actors involved in their Nudge project, i.e. the people or institutions that could be actively involved or have a positive or negative interest in the project. So, in addition to the target audience, here we list the project client, the project manager and the institutions that will be involved.

The use of the circle is to graphically represent the proximity of the

project to the institutions and actors listed, where the closer to the center, the more relevant to the execution of the project. There is no quantity limit.

Tip: Another concept that helps when filling in this item is that of stakeholders in project management.

STEP 8: NUDGE CANVAS - STAKEHOLDERS, OBSERVATIONS, DATA SOURCE AND PROBLEM



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Pasting Post-it on Canvas.

At this point, a review should be made of what has been written in

the idea (item 1); it is possible that something will be re-evaluated and modified. At this stage, the time limit is 2 minutes for each collage and, immediately afterwards, what has been written on the stakeholder map should be put into stakeholders (item 2).

In observations (item 3) the conclusions of the hypotheses and doubts part of the HSCD matrix are put. These should be the important aspects that emerged during the construction of the idea. It's important to point out that we use the word "observations" precisely because of its broader connotation, since in practice it's very common for these discussions to be held with clients who do not always have facts based on data, here you can list their impressions and intuitions. In other words, not every observation will be a fact, but it may still be necessary to take it into account in order to provide more information about the general environment and contextualize the idea.

The data source (item 4) is what was written in the certainties section of the HSCD matrix, where possible sources for the data that will be used should be listed. We also encourage you to indicate specific information, if any, that qualifies the idea's approach, i.e. contextual information that can validate your idea. And finally, another list that we encourage at this point is that of possible indicators, which are metrics that are involved in the topic being addressed.

In the problem (item 5), what was discussed in the exercise in the "Problem" tool remains. This is the moment when the integration phase ends. Participants begin to get to grips with the Nudge Canvas design and can start thinking about new points to put into the project.

Next comes the construction of the objective (item 6) and the

hypothesis (item 7).

PARA QUEM? QUEM TEM A DOR? O QUE PENSAMOS? QUAL OBJETIVO?

STEP 9: HOW CAN WE

This stage does a better job of thinking about the target audience and the solutions related to the project idea. This encourages participants to further specify the hypothesis of the experiment. Each column is a model for reflection: the first two are aimed at the target audience, the third the architects of choice and the last at the project.

Before this stage, the target audience has already been defined and some data related to the project has already been imagined. Now, the "for whom" column is used to define profile characteristics, such as age, gender and color. In other words, define who this project is for. Who exactly will receive this Nudge? You have to choose who will benefit from it. The time to do this is three minutes and it's important that the result of this column is just one sentence.

Filling in the "who has the pain" column will also take three minutes. In this column, a reflection is made based on the problem, because there is a risk of choosing the wrong audience if we don't do this. What should be defined here are the pains that the defined audience has and that will be solved with Nudge.

In "what we think", the participants will have three minutes to revisit what was defined in the "for whom", "who has the pain" and the rest of the Nudge Canvas to decide whether the audience adheres to the project being designed. This column was developed to serve as an exploratory question that aims to find out what the solution is. How can Nudge be done for the people we've mapped? How can the person being impacted have their situation improved?

In the last column, "what is the objective", the objective that connects everything that has already been put together is written down. The idea (item 1) and the problem (item 5) written on the Nudge Canvas should be re-analyzed and, based on the reflections, a main objective and a secondary objective are added, each in one sentence. Each one should be written in three minutes, for a total of six minutes.

The recommendation for these two objectives is that they should be clearly presented and that they should be specific, measurable, relevant, achievable and executable in a feasible and strategic timeframe. The measurable indicators should be based on the data source part (item 4) of the Nudge Canvas.

It is also recommended that the main objective be the delivery, which in itself counts as a well-executed and successful project. While the secondary objective can be of a relational nature, being seen as in addition to the main deliverable. In real cases it is possible to have several secondary objectives, but in agile exercises it is better to select just one.

STEP 10: PERSONA



In this tool, the groups create the persona and imagine their behavior during the day and night. The aim of this exercise is for the developers of the Nudge project to try and experience a day with the person who represents the project's target audience.

Five minutes will be set aside for describing, imagining and reporting on the persona's behavior during the day and another five minutes at night. To make the work easier, the groups can research any information that will help create this story.



STEP 11: EMPATHY MAP

This tool allows you to see the target audience in more depth,

understanding what they feel, what their needs, desires and problems are in more detail.

The groups will have 12 minutes to answer the quadrants, which correspond to six main questions, meaning they will have two minutes per question:

- What do you think and feel?
- What do you hear?
- What do you say and do?
- What do you see?
- What are your pains?
- What are your needs?

STEP 12: TOOLS



At this stage, the tools that the participants will have access to in order to make the Nudge are defined, for example, email, or any way of accessing the public and solving the problem. They will have eight minutes to reflect, because here the limitations begin to be categorized.

It is important to remember that through a Nudge project it is possible to reflect on a group of people from observations about an individual and thus access the emotions that impact the decision-making process more realistically.

STEP 13: CRISIS POINTS



Having thought about the necessary tools, we can now think about the issues that could hinder the project. It is important, when assessing the restrictive context, not to dissociate it from the tools listed above and to think in an applied way about what impacts the project.

All difficulties and problems should be summarized in up to three points: these should be described in three separate sentences, and all should be written in three minutes.

STEP 14: DECISION MAKING



Now the participants have to imagine the individual's decision-making process in order to reach the Nudge goal, such as not missing appointments and exams. If they are not guided by this goal, it is possible that they will only think about their personal issues. This biases the construction of the analysis. We emphasize that this process is intended to reduce this risk, since at this point the participants have already gone through many empathy exercises with the selected audience, stimulated by the previous tools.

Here, the architect of choice needs a managerial eye. Why is the person going to decide on the path we have designed for them? What possible choices can the beneficiary public make? The groups will have five minutes to write down one or two thoughts on this possible decision. The problem statement (item 5) from the Nudge Canvas can be used.





Next, the participants will answer a few questions to start imagining what the Nudge they create will be like. In "use of information", we think about how information can help a person's behavior. For example, what information on the service's website is useful for the purpose of the project?

In the "decision aid" block, questions are answered in a more general context, regarding resources and access. In these two blocks, the groups will have three minutes each and can form up to three sentences in each block.

In the "decision structure" block, we look at what benefits the project will bring and what alternatives will help you have a positive experience with the intervention. This reflection based on the questions in this block takes five minutes.

STEP 15: NUDGE CANVAS - END OF THE PROBLEM PHASE



Criado por Rafaela Bastos - Economista Comportamental | NUDGERIO HEAD

Pasting Post-it on Canvas.

At this point, all the possible approaches to creating the Nudge have been considered. Under objectives (item 6), the conclusions of the "How Can We" tool are presented. The participants now have five minutes to create the phrase that will serve as the Nudge hypothesis (item 7). It is essential that it is a contestable sentence, i.e. one that can be demonstrated to be true or false. In the end, the hypothesis will be the relationship between the Nudge idea and the problem.

Next, participants are asked why they believe in the hypothesis they

have developed and are asked to put their answers in assumptions (item 8). The purpose of this step is to reduce the construction of purely intuitive hypotheses.

A literature review can be done to support the assumptions, but if this is not possible, the information can be collected from the participants' memories and checked later. Participants must choose two assumptions in two minutes.

Under database information (item 9) the data is put in and the data source item (item 4) must be observed. Participants should do this in two minutes. It is advisable to describe the qualitative and quantitative information from the databases and indicate behavioral patterns that can be evaluated by this data.

At the time of writing and completing the behavioral principles step (item 10), they should list the heuristics and biases that may be related to decision-making involving the desired behavior. Participants should do this in five minutes.



STEP 16: NUDGE CANVAS - EXPERIMENT PHASE

Created by Rafaela Bastos - Behavioral Economist | NUDGERIO HEAD

Pasting Post-it on Canvas.

Replication of the idea (item 11) reflects on the possibility of the project and/or its results being replicated in other contexts, cases and cities. In addition to affirming or denying, it is important to justify why and describe how other institutions or people could replicate it. This stage should take up to three minutes.

The context (item 12) is the time to map out the incentives in the environment related to the beneficiary public. For better visualization, you can draw a route with the decision flow to the benefit. This allows you to check the *defaults* and saliencies and indicate the user's interests. This stage should take up to eight minutes.

The restrictions stage (item 13) contains the content that was developed in the "Crisis Points" tool. Here it is suggested that the challenges and limitations encountered in the initial approach to the design of the experiment be reported. This step should take up to three minutes.

The type of intervention (item 14) is where you describe how the project will be carried out and the types of intervention you want to test. This step should take up to five minutes.

Under method (item 15), the way in which the intervention will be measured is written down. The format for analyzing the chosen intervention should be indicated. This step should take up to three minutes.

The selected sample (item 16) is where you describe the number of participants and the treatment and control groups for the experiment. This step should take up to three minutes.

STEP 17: NUDGE CANVAS - INTERVENTION PHASE



Created by Rafaela Bastos - Behavioral Economist | NUDGERIO HEAD

Pasting Post-it on Canvas.

Under testing (item 17), the procedure chosen for the intervention and the heuristics and biases also chosen are reported. This item should tell you how the intervention will be carried out, highlighting the method, the procedure chosen for the intervention, the timetable and the heuristics and biases within the intervention format. This step should take up to five minutes.

In the intervention section (item 18), you should write a summary of the intervention containing: how it will be carried out; who will carry it out; and for whom it will be carried out, all with specific sample data. You also need to detail the days of the chosen intervention, the size of the treatment groups, who will send the e-mail, who will pass on the data, in other words, here you put the information exact of the experiment. Many of them will be wishes that possibly will not occur in the project. This step should take up to three minutes.

Finally, in the result stage (item 19), the results are described. If this step is completed *a priori*, expectations of the results are used; if this is done *a posteriori*, the actual results can be used. In both cases, treatment and control groups should be separated. The effectiveness of the intervention should be listed based on the outcome measures. This step should take up to five minutes.

6. CONCLUSION

Nudge Thinking has emerged as an innovative and holistic approach, rooted in the intersection between Behavioral Economics, Design Thinking and Data Thinking. This methodology arises in response to the complexity of human behavior and the need for effective interventions in the field of public policy. By integrating Nudge theory with user-oriented and data-driven approaches, Nudge Thinking provides a robust model for developing Nudge projects. Through clearly defined phases - integration, exploration, experimental model, intervention and analysis - Nudge Thinking offers a flexible and adaptable framework, capable of guiding from the conception to the implementation and evaluation of Nudge initiatives. In addition, the Nudge Canvas and other complementary tools provide a tangible framework for planning and executing projects, enabling effective collaboration between behavioral scientists, data analysts and other stakeholders.

Therefore, by uniting theory and practice, Nudge Thinking not only facilitates the creation of innovative and effective solutions, but also promotes a culture of continuous learning and improvement in public policies. It enables governments to address social challenges in a more efficient and citizen-centered way, making it possible to develop solutions that really meet society's needs and demands. We hope that this methodology will continue to evolve and contribute to a positive and transformative impact on society.

The NudgeRio team hopes that this report will inspire other people and institutions to apply Nudge Thinking to their projects. Feel free to use it a lot. And, of course, we kindly ask that whenever you use the methodologies created by Nudge Rio, you cite them appropriately, thus recognizing the work done and allowing others to benefit and contribute to the continuous improvement of this approach. If you have any questions, suggestions or other comments, we are very open to discussing this living methodology, as we will continue to improve it as we carry out new projects at Rio de Janeiro City Hall.

ANNEXES



A4 - NUDGE THINKING CANVAS (Click the Qr code)



A3- NUDGE THINKING CANVAS (Click the Qr code)



A0 - NUDGE THINKING CANVAS (Click the Qr code)



RepertóRio (Click the Qr code)

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