Getting & maintaining stakeholder buy in for design research

Melissa Braxton, 18F
February 2, 2018

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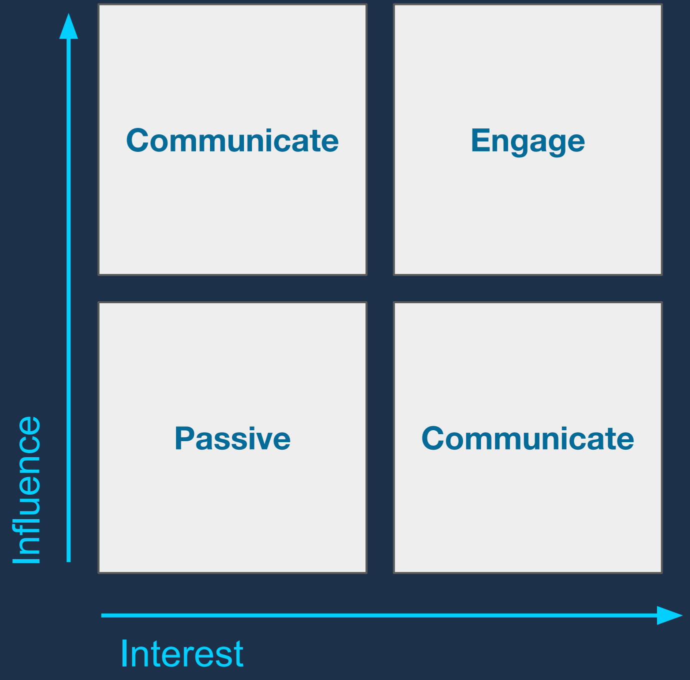
Agenda

1. Why get stakeholder/leadership buy in?
2. How can you get buy in?
    - What are some tools you can use?
3. Answers to common questions from skeptics

A stakeholder is anyone who has an interest in the outcome of a project or process.

Who are your project's stakeholders?

What influence/interest do they have?



- Does the stakeholder have information or expertise that could be helpful?
- How willing is the stakeholder to engage?
- How much influence does the stakeholder have?
- Is this someone who could derail the process if they were not included?

1/ Why should you get buy in for your research?

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“Running a program in government is already tough; tacking on software development to the pile of responsibilities can make the day-to-day chaotic.

Adding to the complexity, **software must be aligned with the other program and policy work** being done to accomplish your goals.”

Kaitlin Devine, 18F Blog

HCD in government usually means doing things differently.

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“In government, **doing things differently is equated with risk**, and risk is something to be minimized as much as possible.

So, it can be hard to figure out how to get started and how to bring your fellow civil servants on the journey with you in your quest for better outcomes.”

Kaitlin Devine, 18F Blog

Building something **without knowing** that it's **the right thing to build** is incredibly risky.

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2/ How do you get buy in?

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How do you get buy in?

1. Ask questions that help surface risks
2. Communicate in language stakeholders understand
3. Show AND tell: try different techniques to engage and communicate
4. Engage stakeholders throughout the process

How to get stakeholder buy in

Communication tools

A

BEFORE YOU START

Project brief

In-person project kick off

Hopes and fears exercise

B

MID-PROJECT

Invite stakeholders to sit in on research sessions

Show them the data ("Blooper reel" screening)

Regular progress reports

C

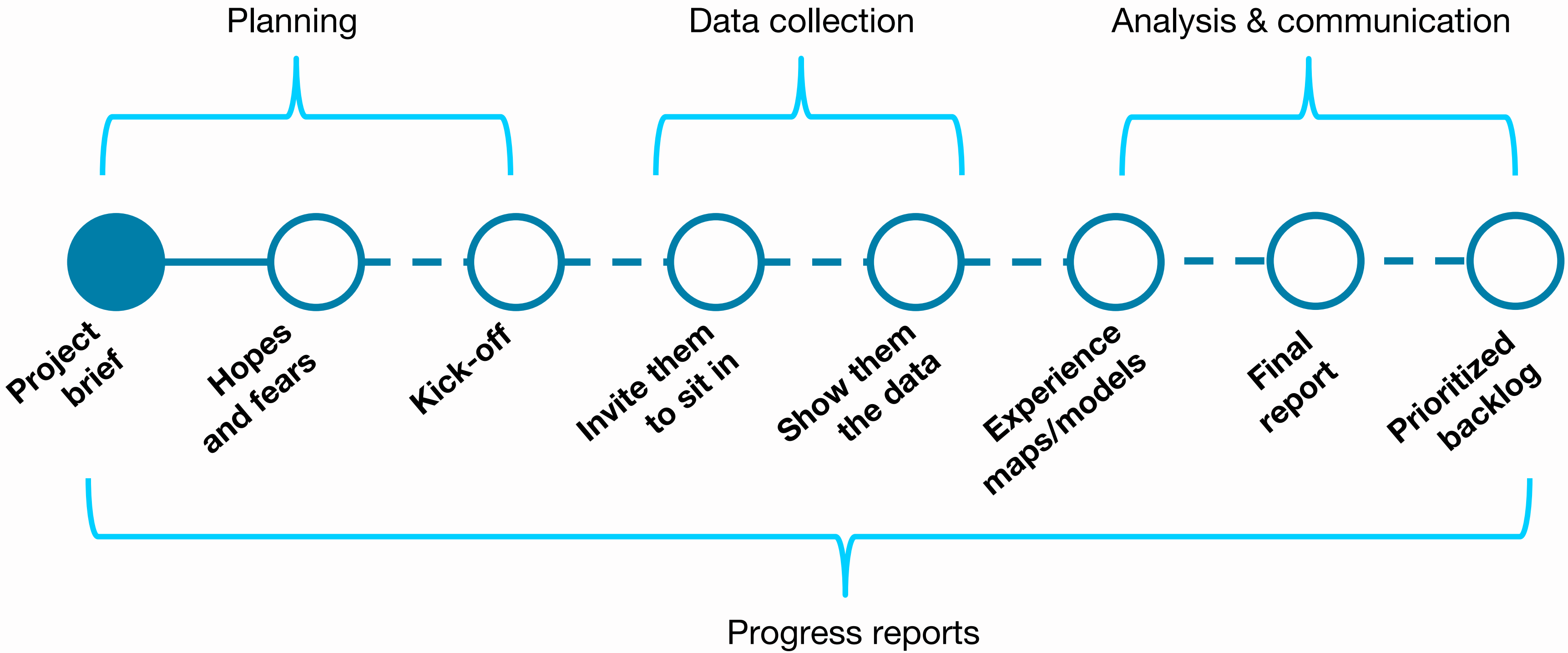
TOWARD THE END...

Experience maps (journey maps, process models)

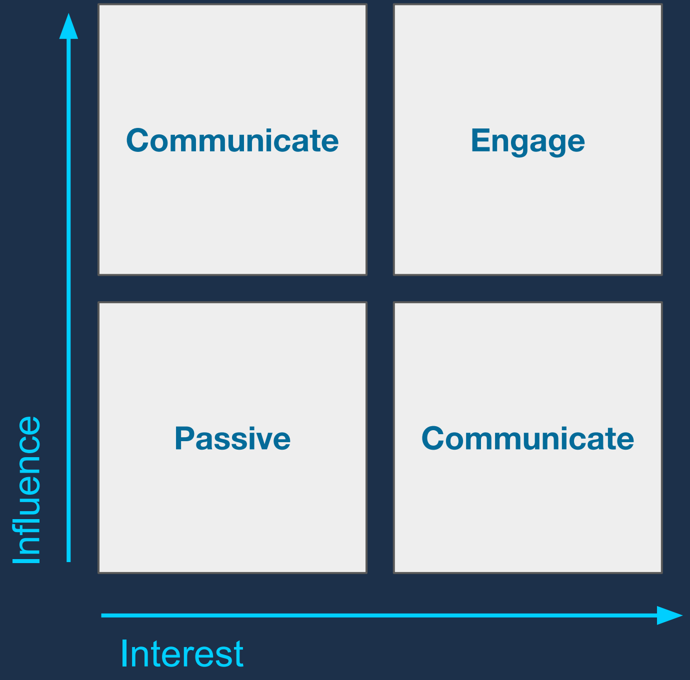
Report of findings and recommendations

Prioritized backlog

When might you use these tools?



Which tools for which stakeholders?



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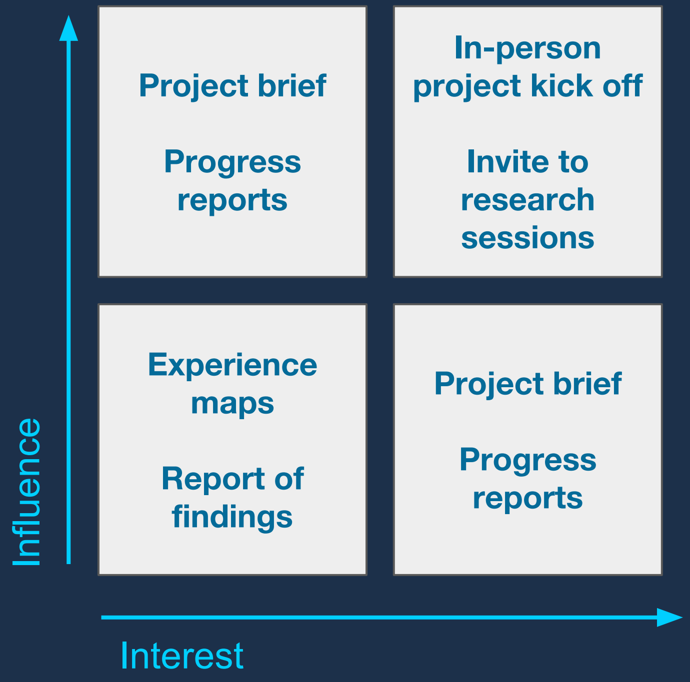

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Before your research starts

At the start of your project...

Project brief

What is it:

A concise, compelling argument for why you and your team should be allowed to proceed with your work.

Show the leadership how your work will benefit them and / or their organization.

Headings you might include:

- Project team and roles
- Background (what's the solvable problem, who has the problem)
- Project goals
- Approach
- Success metrics
- High-level schedule

Version 1: Original shown at the kickoff meeting. Includes some of the comments from the meeting:

> ClinicalTrials.gov provides access to information about clinical studies (such as ~~enrolling in~~ one or learning the outcome) ~~as well as a way for organizations to register clinical studies and report their results~~.
>
> There is a gap between what information ClinicalTrials.gov offers, what users ~~— particularly patients and their caregivers —~~ expect it to offer, and how easy it is for them to get it.
>
> This project aims to characterize that gap by identifying user needs, expectations, and barriers in the beta site, then make recommendations to address them.

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Version 3: Final version approved by stakeholders:

ClinicalTrials.gov provides the public access to information on publicly and privately supported clinical studies on a wide range of diseases and conditions. The information is submitted by those conducting the clinical studies and is put to a variety of uses.

There may be gaps between the information, search capabilities, and usability features that ClinicalTrials.gov offers and what different user groups expect it to offer.

This project aims to characterize that gap by identifying common and divergent needs and expectations across user groups. We will recommend ways to make it easier for users to understand ClinicalTrials.gov's mandate, the information and search capabilities the beta site provides, and what kinds of tasks and decisions this information is designed to support.

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At the start of your project...

Kick off the project

What is it:

A time for your team and stakeholders and leadership to meet, talk through the project together, surface hopes/fears/risks, and get consensus on the team's approach.

Activities you might include:

- Hopes and fears exercise
- Collaboratively edit the project brief
- Other facilitated brainstorming tools to surfacing expectations and risks and help people feel heard.

Hopes, fears, risks

Questions to stimulate people's thinking:

- How confident are we that we've captured all of the "requirements" up front?
- Do we anticipate any of the requirements may change after our initial planning phase? If so, how will we accommodate that?
- Are there some areas with lots of variables and moving parts (like legacy technology systems) where we can't accurately judge the risk up front?
- What could happen if we design/build something that doesn't meet our customer's needs?

Throughout your research

Show them the data!

Invite them to observe

Share quotes or transcripts

Screen a "bloopers" reel

Share prelim findings

Show them the data!

Invite them to observe

- ❑ Consider any ethical issues.
- ❑ Brief them on proper observer conduct.
- ❑ Invite them to debrief afterwards.

Show them the data!

Share quotes or transcripts

- ❑ Consider any ethical issues.
- ❑ Confirm that you've obtained participants' consent.
- ❑ Anonymize the information.

Show them the data!

Screen a “bloopers” reel

- ❏ Consider any ethical issues.
- ❏ Confirm that you’ve obtained participants’ consent.
- ❏ Anonymize the information.

Share out: What’s an example of an ethical issue that might come up?

Show them the data!

Share prelim findings

- ❑ Write up a summary of high-level themes.
- ❑ Point out remaining knowledge gaps.
- ❑ Begin socializing recommendations to avoid any unpleasant “aha’s!” in your final report.

Progress reports

If they can swoop and poop, they should get the scoop.

Progress reports help keep a cadence. They build a rhythm with you and your stakeholders and your own internal team.

Aim for a 1-2 page digestible summary for interested stakeholders and connections across the organization.

Characteristics of a good progress report

- Keep a human tone.
- Limit sentences to one line.
- Send to the maximum number of people possible.
- Avoid using for niche updates with special people.
- Be tactical in your needs/asks—ESPECIALLY for senior leadership.

TEMPLATE
################################

Opener
Get sappy, almost emotional. Share how you feel about the work and what’s going on. If you’re really excited say it!

Completed

- [Verb - item]
- [Verb - item]
- [Verb - item]

Upcoming

- [short description]
- [short description]
- [short description]

To do

- [Task Owner] [Concrete 5-7 word task]
- [Task Owner] [Concrete 5-7 word task]
- [Task Owner] [Concrete 5-7 word task]

Thank you,

The Team

Communicating your research

- Experience maps (journey maps, process models)
- Report of findings and recommendations
- Prioritized backlog

Coming Soon!
~March 2018

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3/ Common questions from skeptics

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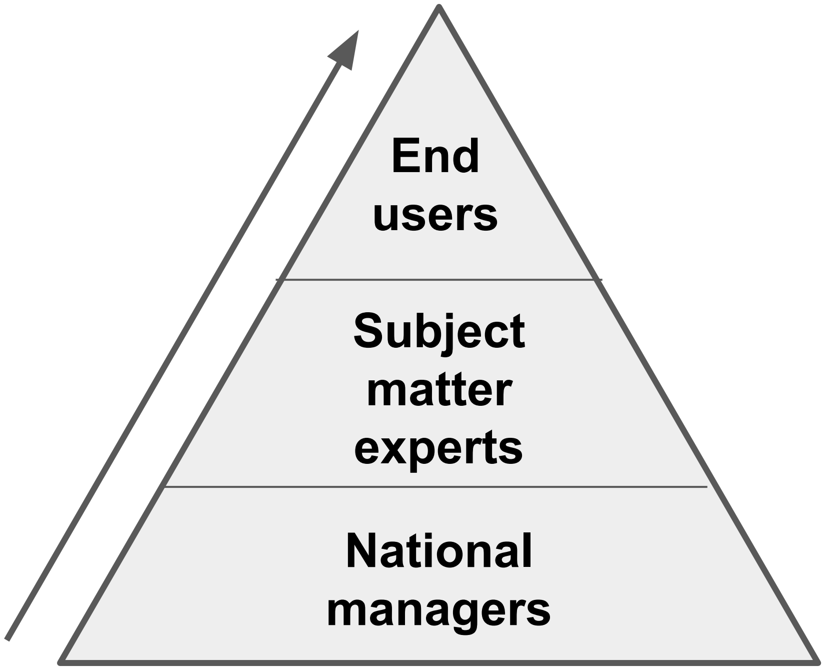
But, we have our own goals to meet; we can’t just give every user everything they ask for!

Setting goal-driven policy, on its own, doesn’t achieve goals.

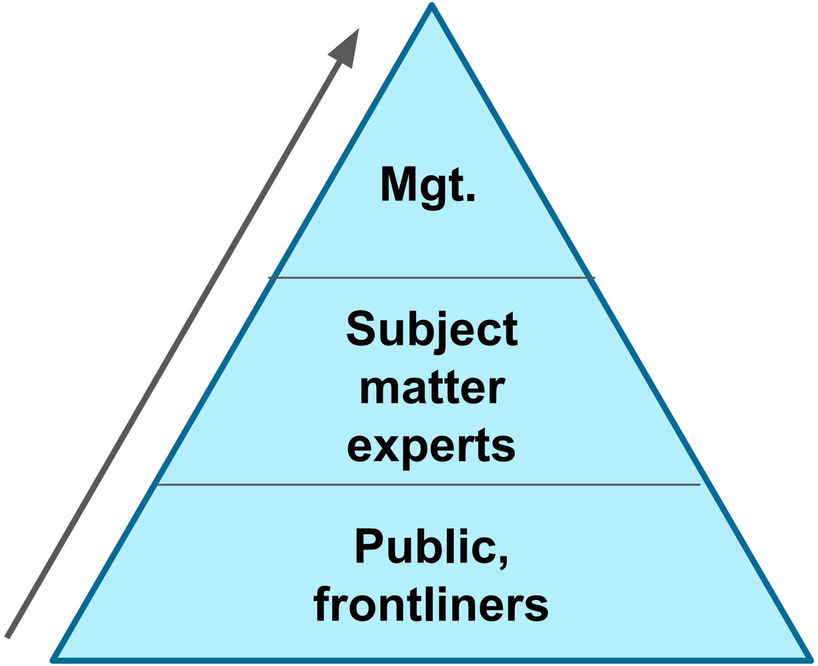
We must build systems that encourage goal-aligned behavior.

How?

Standard approach:



Our, human-centered approach:



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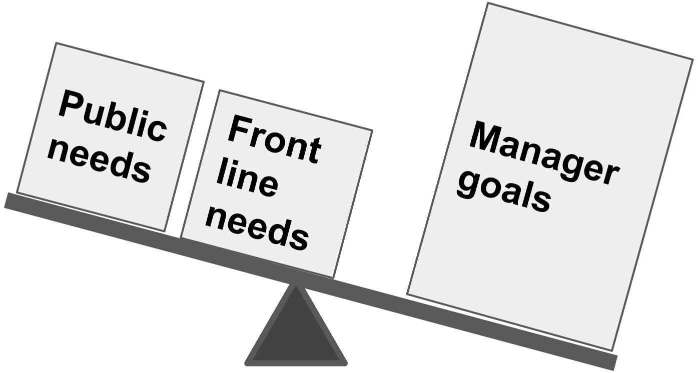

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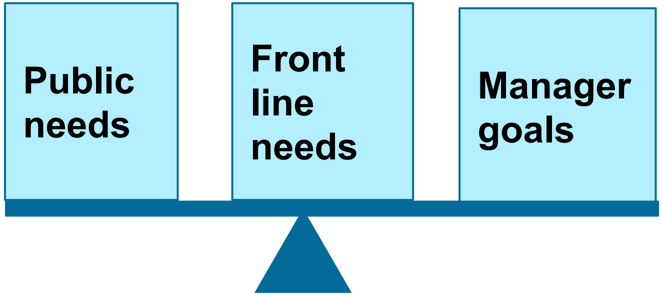
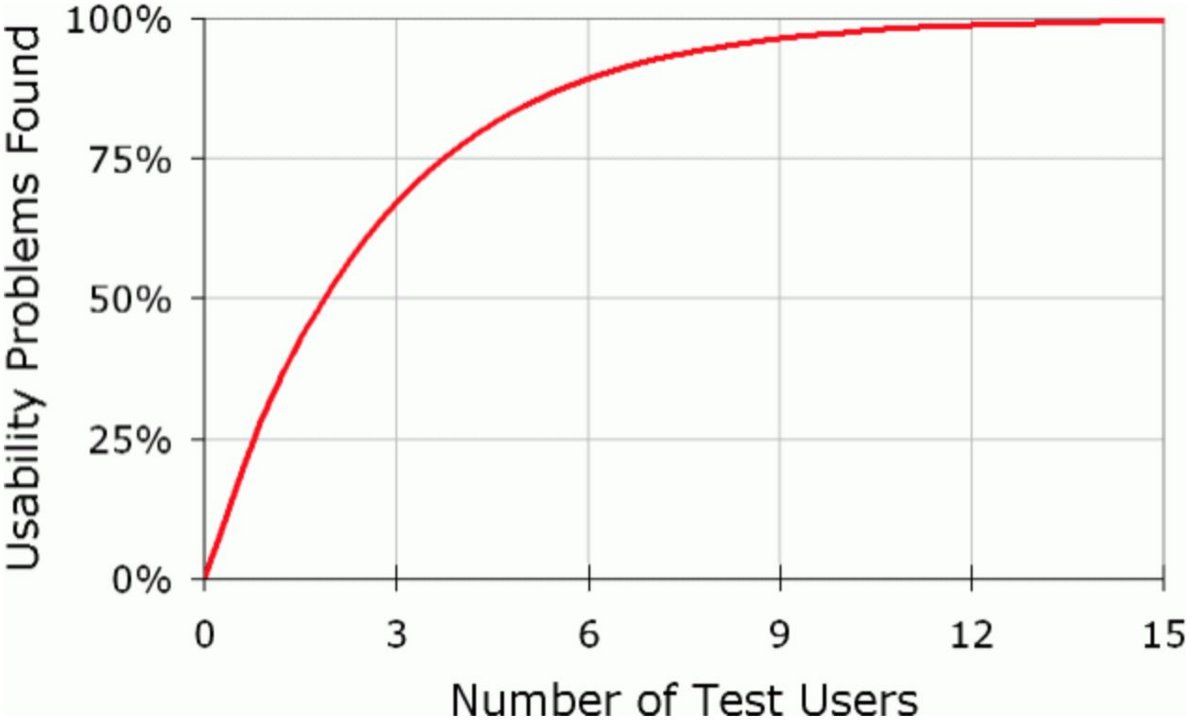


But, we already know what we need! (We did all this requirements gathering!)

- HCD means talking to real users in context
- Users have a hard time articulating tacit knowledge—it must be observed.
- HCD provides an approach to learn what users actually need rather than what they think they might want.

But… What can you learn from talking to **only 5 users?**



Jakob Nielsen. "Why You Only Need to Test with 5 Users." 2000

Questions?

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