






# Phase 1 - Explore

Introduction and Teams

# Housekeeping

- Assignments:
  - Please use proper naming convention

|   |                         |              |
|---|-------------------------|--------------|
|    | Phase 1 Reading_钟振权.pdf | 09月19日 13:59 |
|    | 评论3.png                 | 09月19日 13:53 |
|    | 评论4.png                 | 09月19日 13:53 |
|    | 黄永乐Insight Cards.docx   | 09月19日 13:53 |
|  | Insight Cards.docx      | 09月19日 13:52 |

- Observe “due by” date

# UOCD Design Methods

- Inquire Into
- Identify With

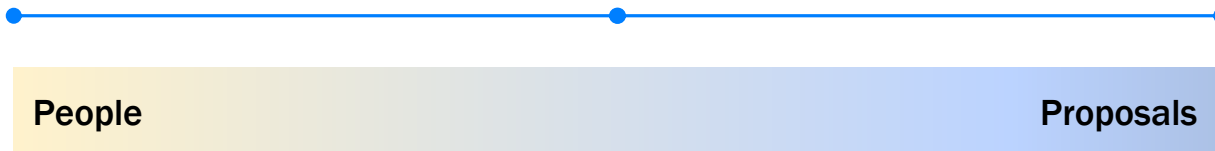
**Explore**  
Phase 1

- Generate
- Co-Design

**Conceptualize**  
Phase 2

- Expand Upon
- Specify

**Develop**  
Phase 3



# UOCD Design Methods

- Inquire Into
- Identify With

## **Explore** Phase 1

Interviews  
Look-Ask-Try-Why  
Do-Say-Think-Feel  
5 Why's  
Storytelling  
Word-Mood Cards  
People Portraits  
Personas  
Interaction Narratives  
Areas of Opportunity

- Generate
- Co-Design

## **Conceptualize** Phase 2

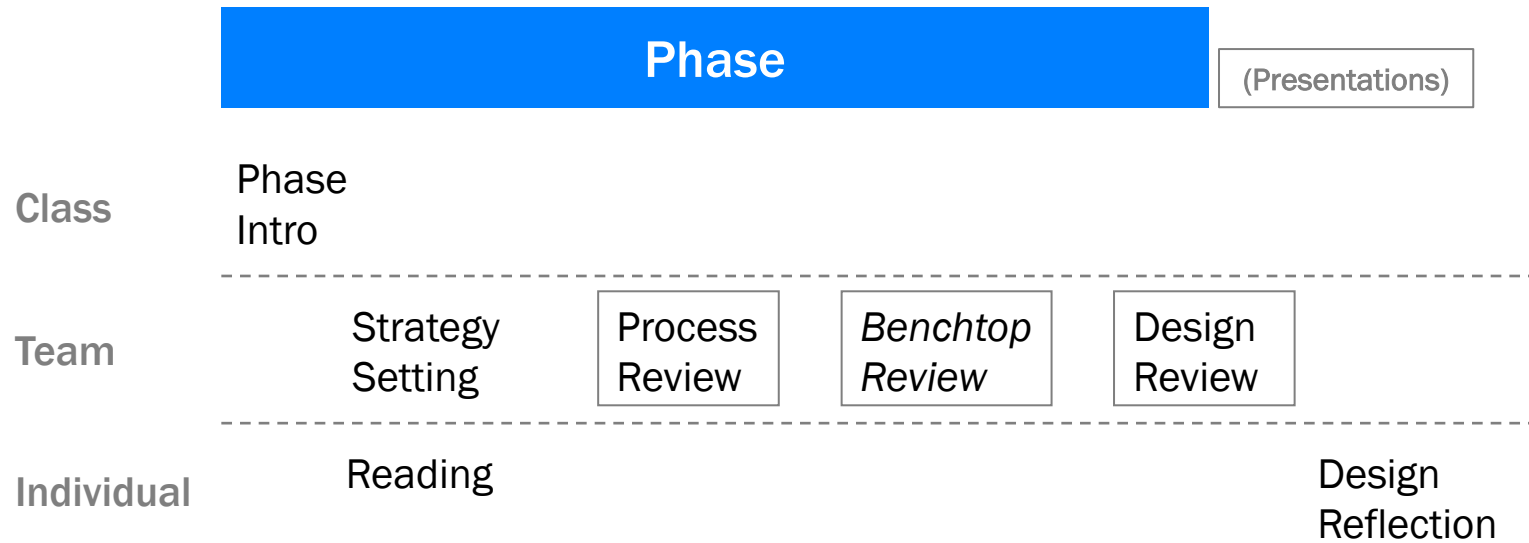
Human Values  
Raw Idea Generation  
Idea Mapping/Shaping  
Scenarios  
Idea Selection  
More-Complete Ideas  
Co-Design  
Acting Out With Props  
Role Playing  
Card Sorting

- Expand Upon
- Specify

## **Develop** Phase 3

Experience Shaping  
Interaction Mapping  
Mappings/Affordances  
Interface Definition  
Requirements  
Sketch Modeling  
Visual Models  
Product Posters

# UOCD Structure



# Team Health

# Team Health

- Build relationships, empathy
- Psychological safety, trust
- Positive, motivation

# Team Health

- Invest in your team!
  - **Bond** Eat, Teach, Play, Trip
  - **Share needs** Working styles, Learning goals, Pet peeves
  - **Get clarity** Shared goals, Know tasks, Doable tasks
  - **Take responsibility** All, PM, Sub-team leads, Get help
  - **Communicate** Overly, Talk in meetings, Share status, Respond
  - **Stay connected** Wechat, Messenger, Shimo
  - **Enable conflict** Set norms, Give permission, Be constructive
- See *Team Health Guide*. To help, we also ask about team health in reviews



# Team Health

- Today
  - Schedule a bonding event
  - Schedule your weekly meetings
  - Create Wechat group and get on a collaboration app (e.g. 石墨文档)

# Teams

# Team Assignments

|                     |      |                     |      |
|---------------------|------|---------------------|------|
| <b>1. 家庭硬件创客爱好者</b> |      | <b>4. 无畏风雨的环卫工人</b> |      |
| 黄永乐                 | 应用数学 | 武龙飞                 | 机制   |
| 周冬豪                 | 信息工程 | 邱榆富                 | 自动化  |
| 吴嘉豪                 | 计算机  | 林俊坤                 | 计算机  |
| 林文韬                 | 工业设计 | 刘岚涛                 | 应用数学 |
| <b>2. 流浪动物援助者</b>   |      | 刘旭辉                 | 机制   |
| 吴炳坤                 | 机制   | <b>5. 滴滴司机</b>      |      |
| 陈煜崇                 | 信息工程 | 李晓蓬                 | 机制   |
| 钟振权                 | 自动化  | 陈诚                  | 自动化  |
| 赖德盛                 | 计算机  | 李咏恒                 | 应用数学 |
| <b>3. 保安</b>        |      | 甄锦雅                 | 信息工程 |
| 黄旭                  | 机制   |                     |      |
| 袁展威                 | 信息工程 |                     |      |
| 陈帅                  | 自动化  |                     |      |
| 朱兴隆                 | 机制   |                     |      |

**Sit with people in your team!**

# Engagement Requirements

# Engagement Requirements

- Obtain verbal approval
  - Approval Statement & Contact info for each person you speak with

# Engagement Requirements

- Making Arrangements

| Not Necessary  | Necessary  |
|--|--|
| <ul style="list-style-type: none"><li>• Public places, e.g. on public transportation, parks</li><li>• Common areas, e.g. shopping malls, many stores</li></ul> | <ul style="list-style-type: none"><li>• Speaking to clerks or shoppers within a particular store</li><li>• Private institutions/<br/>populations of people<br/>(employees or constituents)</li></ul> |

# Engagement Requirements

- Timing
  - Avoid work hours
  - IF work activity observation is necessary, explicitly confirm
    - If meeting during work hours is OK
    - Minimal economic risk
    - If supervisor approval is required
      - Best done over phone/email prior to visit



# Ethical Engagement

# Ethics

- Department of Health and Human Services
  - Definition of research:
  - *research is a systematic investigation designed to develop or contribute to generalizable knowledge*
- UOCD projects are **not research**.
  - They are user studies that:
  - *propose ideas relevant to a product or service*
  - *NOT generalization (there are exceptions)*

# Ethical Considerations

- Users who are off-limits in UOCD:
  - minors, prisoners
  - cognitively impaired
  - individuals who cannot give their “approval” to participate
- Benefits (for users)
  - No direct benefits, but indirect

# Ethical Considerations

- Physical risk
  - Audio system in car, toll booth workers--distracting from task; don't test anything medical
- Psychological risk
  - Discloses personal info: family relations, love-life
- Financial risk
  - Job security, lost opportunity

# Recording Ethics

- Audiotaping
  - Need approval; do not conceal device; not anonymous
- Photography and video
  - Same as above
- Confidentiality
  - Use pseudonyms

# UOCD Ethics Process

- Create “Approval Statement” today (due by Fri. Sep 27 @ 8:00AM)
- Create contact card for users

# Approval Statement Outline

- Purpose
- Description
- Techniques
- Risks and benefits
- Payment (none)
- Time commitment
- Obtaining approval
- Contact information (for student and lead instructor)

# Next Steps...

- Create and practice approval statement (due Fri. Sep 27 @ 15:00)
- Create contact cards for users
- Create Visit Guide (due Today Sep 26 @ 22:00)
- Start strategy setting (due Sun. Sep 29)
- Schedule engagements today – don't just email!
- Go out this weekend and engage!
- Come back and make People Portraits, etc. (presentation Thu. Oct 10)



# Sources

Linder, Benjamin. Ethical Engagement. Jan 2019.

<https://canvas.instructure.com/courses/1518820/files/73815687>. Powerpoint Presentation.

Linder, Benjamin. Explore Phase Introduction and Teams. Jan 2019.

<https://canvas.instructure.com/courses/1518820/files/73815689>. Powerpoint Presentation.