johnnyholland.org /2011/10/storyboarding-ux-part-3-storyboarding-as-a-workshop-activity/

Storyboarding & UX – part 3: storyboarding as a workshop activity

9-11 minutes

The previous article in this series described a step-by-step technique for drawing storyboards to help us as designers understand the issues we try to solve, and to communicate existing issues and potential solutions to others. When it comes to research techniques, the great news is that storyboarding can also help others articulate their own issues and ideas. It's to this purpose we now turn.

The importance of doing as well as talking

One of the great truths about user experience design is to observe what people do, rather than only listen to what they say. This is why user-centred design techniques like contextual inquiry, job analysis and usability testing are so valuable. But when it comes to user research workshops, we know that we're up for a lot of listening, and that people have a habit of putting on their 'Sunday best' when giving opinions and describing their experiences.

Thankfully, there's a whole host of various activities we can do with workshop participants to reveal user requirements and behaviours, beyond talking and listening. These activities tend to be easy to understand, easy to do, and (hopefully) easy to derive insights from participants that can be used to formulate the project's solution.

When to use storyboarding as a workshop activity

At Digital Eskimo, we have had great success with using storyboarding as an activity in workshops. Storyboards have very broad appeal, for many of the reasons described in the first article in this series. They are easy – even entertaining – to consume, because they bring together many different aspects of story, character, problems and resolutions, all in a familiar format of images and words, to make even complex ideas much clearer. They are also easy to draw, even at a very basic level, because everyone understands the sequential nature of telling a story through simple pictures.

Storyboarding is useful in the following specific instances:

- When participants need to tell detailed experiences – storyboards provide an easy framework to help people be specific about relating an experience, including expectations, decisions and feelings, rather than just vague commentary;
- As a co-design exercise to generate ideas – we at Digital Eskimo are big proponents of co-design, or participatory design. Participatory design actively involves all parties – client stakeholders, researchers, designers and public alike – in the design process, to ensure the end result is as useful and desirable as possible. This approach suits us designers, because we're used to thinking conceptually, whereas many others have trouble thinking this way. Allowing people to express their ideas through a story that they can relate to, can be much more effective;
- When it's important to keep emotion in the experience, but not in the telling of the experience – sometimes in workshops there are many complex and sometimes conflicting emotions involved in relating experiences relevant for user requirements. Or sometimes the mix of participants in a workshop is such that some might feel inhibited to share certain experiences. It's hard for some to be completely honest, for example, if their superiors are in the same workshop. Storyboards give them permission to keep emotions out of verbal communication, but lock them into the story on the paper;
- When participants are children – the comic-style conventions of storyboards, such as simple stick figures and emoticons, help children articulate more than their limited verbal abilities usually allow. Some researchers, such as Hannah Chung and Elizabeth Gerber (Emotional Storyboarding: A Participatory Method for Emotional Designing for Children, Northwest University, Illinois), have had great success with this approach.

A workshop participant drawing a storyboard to express her experience of using various types of office software. Notice the use of a 6-frame template on A4 paper, and simple use of figures and text.

A practical guide to storyboarding as a workshop activity

The following steps and ideas describe how you could use storyboarding as an activity in your user-centred design workshops. You can use these steps whether you'd like to use the storyboarding format to gather requirements from your participants, or to gather ideas.

Be clear about the purpose

Like all workshop activities, it's important that you know exactly why you're conducting the storyboarding activity. You may end up with a range of lively attractive storyboards, but without a clear goal, they may not give you the insights you're hoping to derive.

Materials

Here's a list of materials that have proved valuable over and over again in the storyboarding activities we have conducted:

- A4 '6-up' storyboard template – It's usually sufficient to give people one A4 template, with six frames drawn on it, in landscape format (pictured above). You may want to also try including some lines under each frame for people to add notes;
- Pens, pencils, textas – Drawing materials can include anything from pens and pencils, to lots of different coloured textas. Even if you're conducting a workshop with conservative business types, coloured textas sends a message that it's OK to be creative and playful;
- Icons – It can still be a little daunting for some to start drawing with just the template and a pencil. Depending on the context of your workshop, it's a good idea to include a pack of prepared cut-out icons, including pictures to indicate channels (mobile phone, call centre, store, laptop, tablet, television, radio), transport (walking, car, bus, bike), common websites (Facebook, Youtube, Flickr, webmail) and emotions (anything ranging from happy, curious and hopeful to bored, confused and angry). Icons like these help to accelerate participants' thinking and demonstrating their experience on paper. Remember to include glue sticks to stick the icons on the storyboards;
- Prompt sheet – it never hurts to hand out a simple one-page instruction sheet about what it is you want your participants to do.

The process during the workshop

Set the scene

When it comes time to do the storyboarding activity in your workshop, frame the activity by telling everyone what the purpose of the exercise is. Refer them to the prompt sheet and materials. If you think it will help, model the behaviour you're after by drawing one frame on a template sheet, so that people are clear about what you'd like them to do.

If your workshop has several activities, they're probably coordinated in some way to work as a whole. Tell your participants how the storyboarding activity relates to any other activities that have preceded it. For example, our workshops often have an activity to come up with the desired audience types that will use the product that the workshop is focused on. We then use those audience types as the characters in the storyboards.

Two examples of instructions:

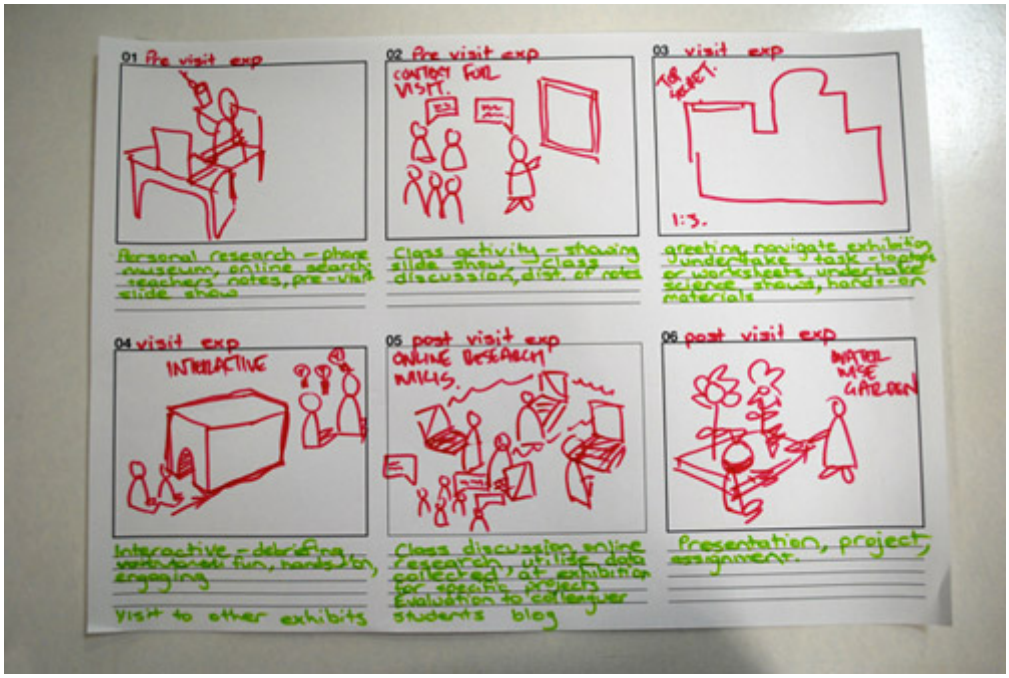
1. Think about an experience you've had with booking a flight online. What sort of flight were you after and why? Where did you start, and what did you do? Using the storyboard template, sketch your experience step-by-step, including anything that went well or went wrong.

1. Now that we've described our three target audiences, choose one and sketch on your storyboard template what an ideal experience would look like for that audience to book a flight online. What exactly are they after? Where do they start? What ideas for website features can you think of that would make their experience ideal?

Draw the storyboards

Decide whether you'd like each of your participants to draw their own storyboards, or if they will work in small groups. Allow at least ten minutes to let them think and draw.

Get everyone to focus on the same sorts of elements that were discussed in the first and second articles in this series; get them to think about triggers (what has happened to start this story in the first place), the single goal that the character wants to achieve, and what the final outcome is. Should it show a clear benefit of a solution? Or an existing problem?

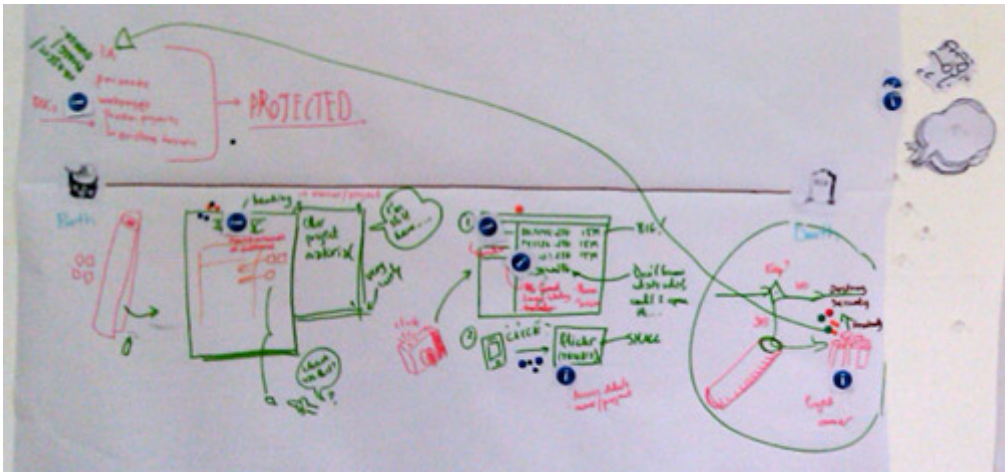


One of several storyboards drawn in a workshop about designing a better museum visit experience for teachers and students. Notice the use of colour, and how simple figures and drawings can actually convey a lot of ideas.

Present to the group

After they have drawn their storyboards, it's always great to invite each participant up to present their storyboard to the rest of the group. Depending on the context of your workshop, you can then invite

some discussion about the experience illustrated, or some critique about the ideas put forward.



This storyboard was actually done by a group of participants as a simple timeline, pinned to the wall. The detail isn't important, but notice the use of 'I' information icons for wherever system information was needed in this process, and the set of speech balloons pinned to the side.

Try storyboarding in your next workshop

Try storyboarding as one of the activities in your next workshop, even an internal brainstorming session. You should find that people will appreciate the hands-on nature of the exercise, and the opportunity to express themselves in another way other than verbally. It’s rewarding for both participant and user experience designer alike.