Bio

Workshop| Guerrilla research methods

Agenda

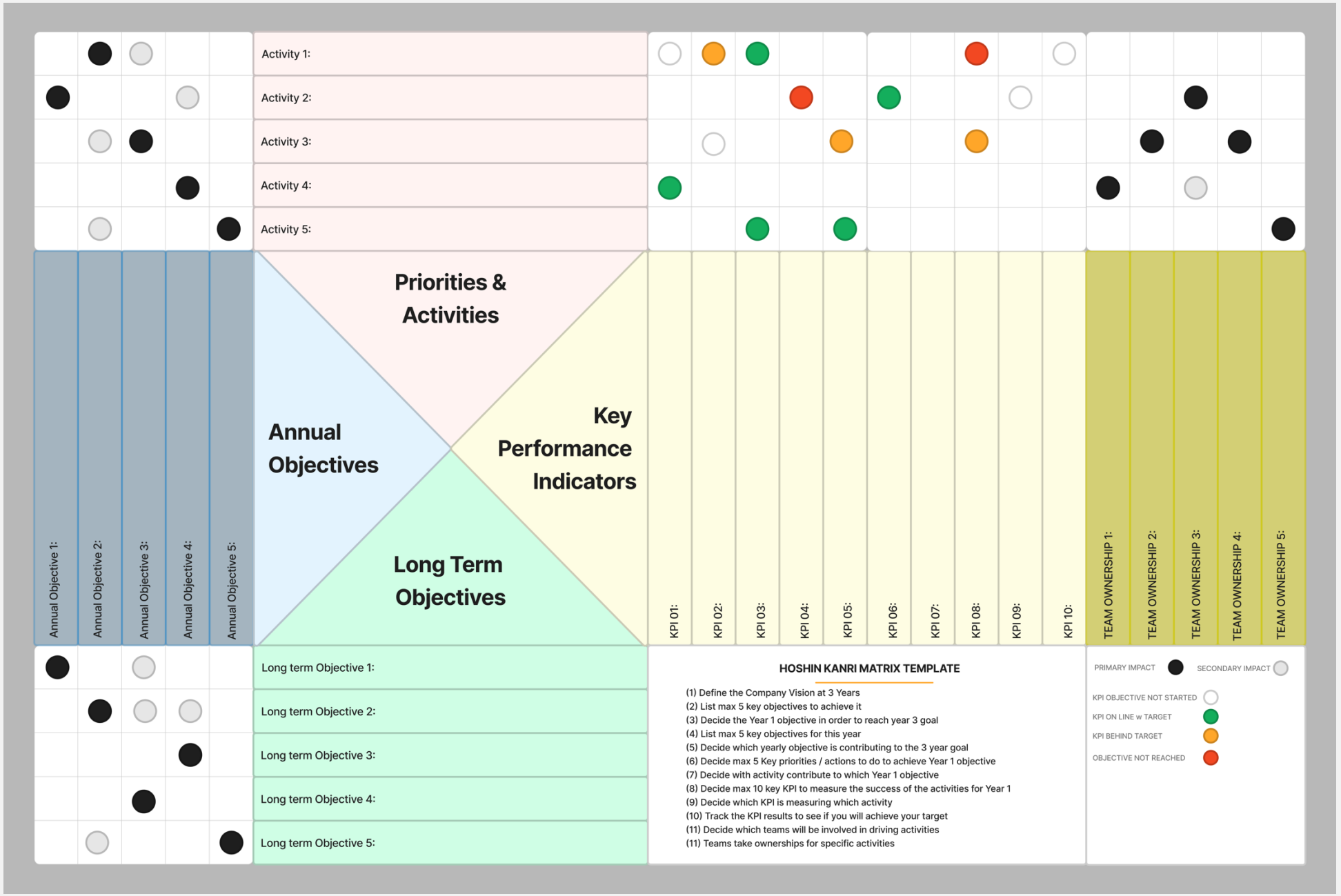
Insight development	1. Design thinking research principles
	2. B2B startup user-centered research
Experience and imagination	3. Empathy and customer discovery
	4. Design thinking toolbox
Prototyping and modelling	5. Research questions
	6. Research insights
Value creation	7. Research analysis
	8. Putting it all together
Leadership and negotiation	9. Workshop
	10. Reflection

By the end of this workshop you will be able to:

1. **Explain key guerrilla research methods** and their application in a B2B context,

2. **apply iterative design thinking tools** to solve complex business problems and conduct user-centered research in your own organisation; and

3. **evaluate research findings** and **critically assess** how well insights align with business goals, making decisions to iterate or pivot based on real-world data.


Activity 1:
Activity 2:
Activity 3:
Activity 4:
Activity 5:
Priorities & Activities
Annual Objectives
Key Performance Indicators
Long Term Objectives
Annual Objective 1:
Annual Objective 2:
Annual Objective 3:
Annual Objective 4:
Annual Objective 5:
KPI 01:
KPI 02:
KPI 03:
KPI 04:
KPI 05:
KPI 06:
KPI 07:
KPI 08:
KPI 09:
KPI 10:
TEAM OWNERSHIP 1:
TEAM OWNERSHIP 2:
TEAM OWNERSHIP 3:
TEAM OWNERSHIP 4:
TEAM OWNERSHIP 5:
Long term Objective 1:
Long term Objective 2:
Long term Objective 3:
Long term Objective 4:
Long term Objective 5:
HOSHIN KANRI MATRIX TEMPLATE
(1) Define the Company Vision at 3 Years
(2) List max 5 key objectives to achieve it
(3) Decide the Year 1 objective in order to reach year 3 goal
(4) List max 5 key objectives for this year
(5) Decide which yearly objective is contributing to the 3 year goal
(6) Decide max 5 Key priorities / actions to do to achieve Year 1 objective
(7) Decide with activity contribute to which Year 1 objective
(8) Decide max 10 key KPI to measure the success of the activities for Year 1
(9) Decide which KPI is measuring which activity
(10) Track the KPI results to see if you will achieve your target
(11) Decide which teams will be involved in driving activities
(11) Teams take ownerships for specific activities
PRIMARY IMPACT
SECONDARY IMPACT
KPI OBJECTIVE NOT STARTED
KPI ON LINE w TARGET
KPI BEHIND TARGET
OBJECTIVE NOT REACHED

Problem statement

How might we integrate guerrilla research methods into strategic planning

By incorporating fast, low-cost, real-world insights

So that Hoshin Kanri is more agile, informed, and responsive to dynamic market conditions.

Performance and Health Pillars

Performance
(short-term results)

Health
(long-term sustainability)

Funding-specific readiness

	Performance	Funding-specific readiness	Health
Objectives	Revenue growth Profit margins Customer acquisition and retention Productivity and efficiency Innovation output Market penetration	Market size and expansion potential Revenue scalability Team leadership and growth Unit economics Strategic growth plan Risk ESG	Leadership and vision alignment Employee engagement and development Innovation culture Organisational resilience Risk management Customer loyalty and satisfaction
Metrics	Sales growth Profitability ratios Cost reductions Customer acquisition costs (CAC) Customer lifetime value (CLV) Operational efficiency	Monthly recurring revenue (MRR) Year-over-year revenue growth Customer acquisition cost (CAC) vs. Customer lifetime value (CLV) Customer growth rate Churn rate Net revenue retention (NRR) Burn rate Gross margins Runway	NPS Product iteration velocity Usage metrics Hiring velocity Team engagement and retention Leadership development Innovation pipeline Risk management framework Organisational resilience Financial reporting accuracy Governance metrics Investor updates	Employee satisfaction scores and retention rates Innovation pipeline Talent development Resilience metrics Customer loyalty metrics eg, NPS

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(short-term results)

Health
(long-term sustainability)

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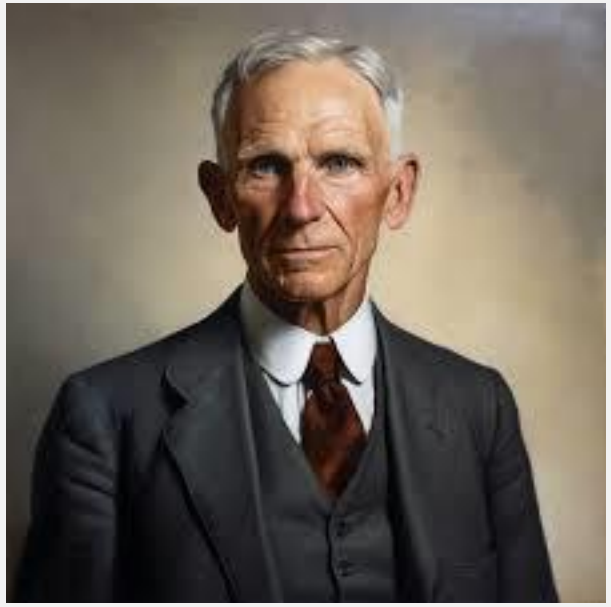
“If I had asked my customers what they wanted, they would have said a faster horse.”



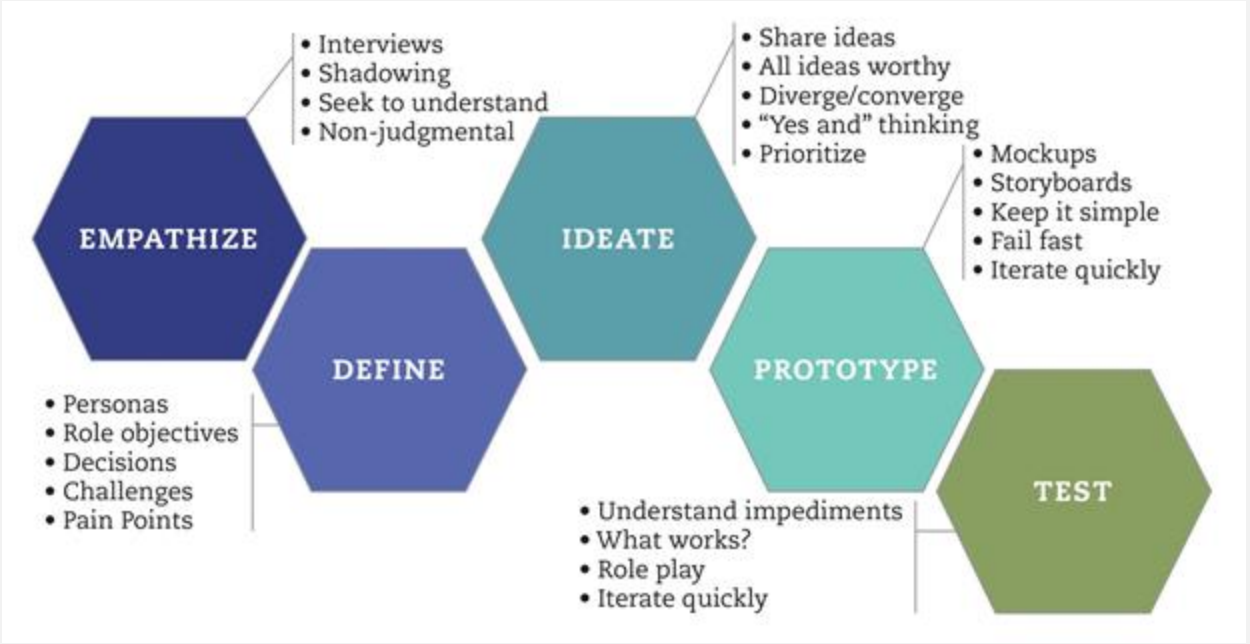
“A lot of times, people don’t know what they want until you show it to them.”

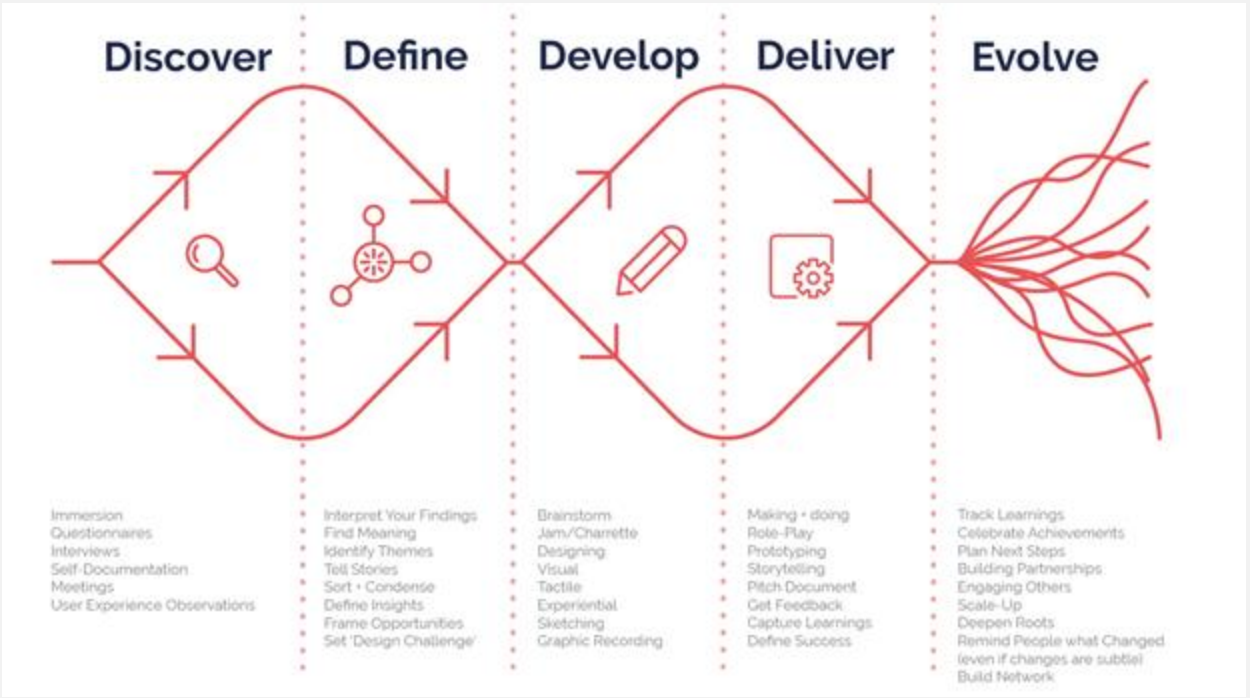
“You’ve got to start with the customer experience and work backwards to the technology.”

Overview of design thinking / what is design thinking in a research context? / importance of user-centered research in B2B startup / aligning research methods with business goals in B2B startup environments.

Overview of design thinking

- User-centered
- Iterative
- Collaborative
- Experimental





What is design thinking in a research context?

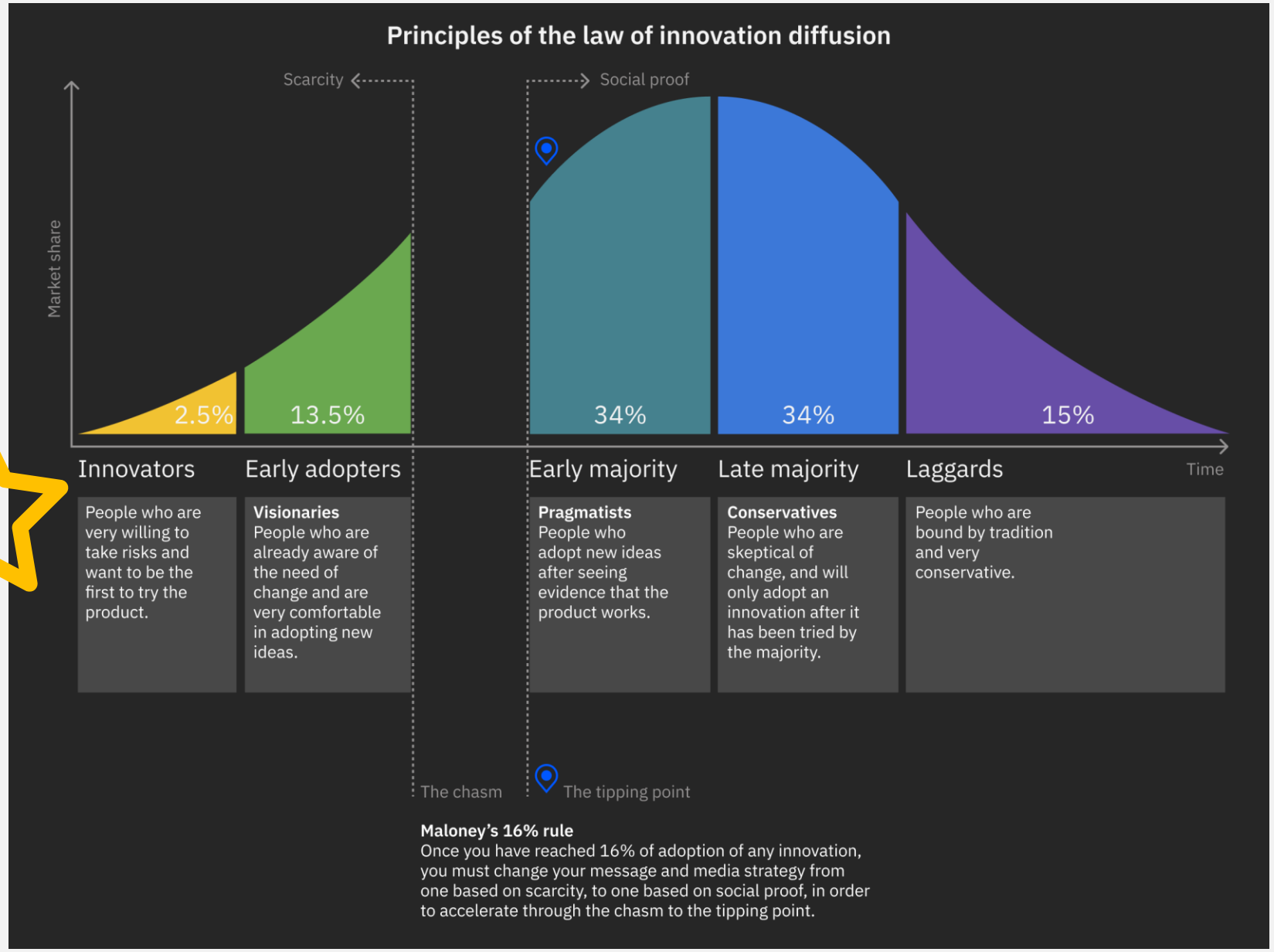
A structured, creative approach to gathering insights and understanding complex problems from the perspective of the **user** and/or **stakeholder**.

Pros	Cons
User-centered approach ensures meaningful and impactful outcomes.	Time-consuming and risk of misinterpreting user needs.
Encourages creativity and innovation by exploring multiple ideas	Too many ideas can lead to analysis paralysis.
Iterative process allows continuous learning and adaptability.	Iterations may increase time and cost.
Collaboration across disciplines enriches insights.	Large teams can slow the process due to differing opinions.
Rapid prototyping helps gather feedback early and reduce risks.	Prototyping may oversimplify complex problems.
Flexible and adaptable to uncertainty.	Lack of rigid structure may feel unpredictable or hard to manage.
Engages stakeholders for greater buy-in and relevance.	Managing too many stakeholders can lead to diluted outcomes.

Cons:

Resource intensive	Design thinking can be resource-heavy, requiring time, budget, and manpower, particularly during the empathy and prototyping stages. For early-stage companies with limited resources, this could be a drawback.
Difficult to measure success	In the research phase, the success of design thinking can be hard to quantify compared to more traditional methods that rely on metrics or data-driven validation.
Cultural fit	Design thinking may clash with traditional organizational cultures or those that prioritize hierarchy, efficiency, or predictability over exploration and creativity.
Risk of overlooking Analytical rigor	While highly creative and exploratory, design thinking may sometimes lack the deep analytical rigor seen in more formal research methodologies. There's a risk of basing decisions on anecdotal or surface-level insights if the process isn't managed well.

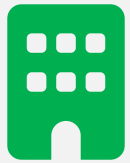
Who are your extreme users?



Bias towards action

Building strong customer relationships	Addressing complex customer needs	Driving product-market fit	Minimizing risk and reducing waste	Shortening the sales cycle	Creating competitive differentiation	Enabling agile iteration	Supporting strategic decision-making
							
Relationships are often long-term and built on trust. User-centered research helps understand the specific pain points, processes, and goals of business customers Crucial for customer retention and recurring revenue.	B2B customers have complex, multi-layered challenges that require tailored solutions. User-centered research can gain insights into these challenges by engaging directly with decision-makers and end-users.	Key milestone. Understanding how your product integrates into the workflow of other businesses. User-centered research uncovers how well a product addresses customers' operational needs, helping refine their offerings to meet actual demand.	Avoid building unnecessary features or services. User-centered research can prioritize features that are most valuable to their business customers.	User-centered research helps startups understand the decision-making process within their target businesses Position the solutions in a way that resonates with the key stakeholders.	Stand out from competitors by providing tailored solutions that are deeply informed by the needs of their customers. Key differentiator in markets where products and services might otherwise seem similar on the surface.	User-centered research allows for quick feedback loops with customers, enabling the company to iterate its products or services rapidly based on real-world user feedback. This agility helps the startup respond to changes in customer needs or market conditions more effectively.	User-centered research informs strategic decisions such as pricing models, go-to-market strategies, and partnership opportunities. By understanding customers' value perceptions and decision-making criteria.

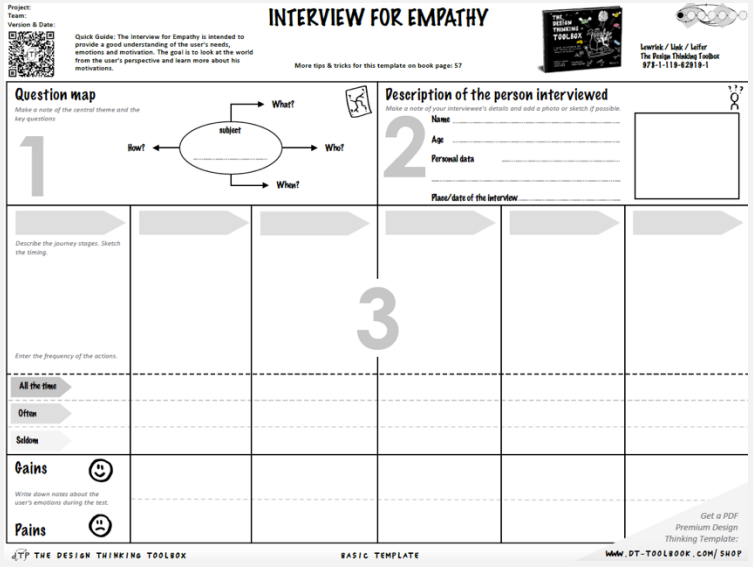
Bias towards goals

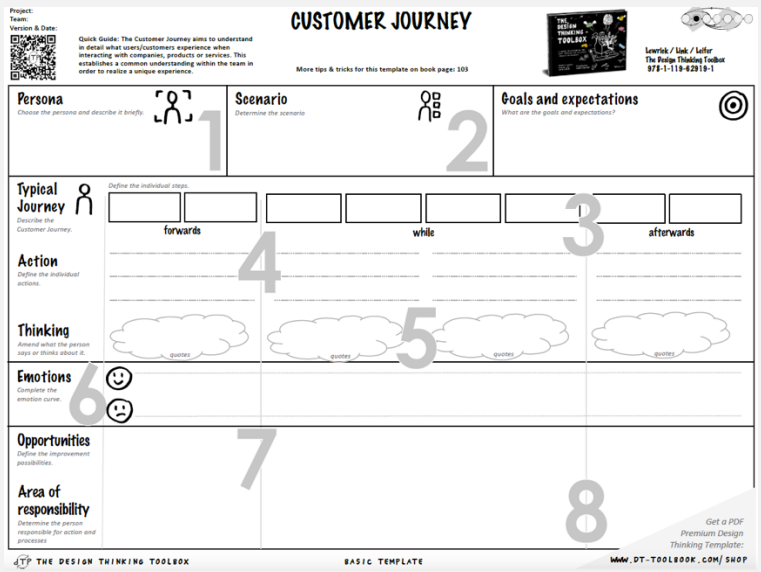
Understand the business objectives	Choose the right research methodology	Align metrics with business KPIs	Involve key stakeholders	Use iterative and agile methods	Research efforts based on business impact	Translate research into decisions	Monitor and measure outcomes
							
Start with clarity—whether it's growing market share, improving customer retention, launching a new product, or entering a new market. Align the research focus to the goals: For example, understanding customer satisfaction, pain points, and reasons for churn.	Qualitative vs. quantitative vs mixed methods. Exploratory vs. confirmatory. Eg, identifying new opportunities, or confirming a specific hypotheses.	For instance, if a business goal is increasing conversion rates, usability testing can focus on identifying friction points in the customer journey. Customer-centric KPIs: If the goal is to enhance customer satisfaction, research should focus on user experience, customer journey mapping, or net promoter score (NPS).	Engaging stakeholders ensures that research questions address the practical needs of each team, making the insights more actionable. Co-create research objectives: involving stakeholders in defining research objectives ensures that the research aligns with broader business priorities. This also increases buy-in.	Agile methods like rapid prototyping, quick feedback loops, and guerrilla research help keep research responsive to evolving business goals. Actionable insights: research outputs should provide clear, actionable insights that teams can implement quickly.	Focus on high-impact areas: In startups with limited resources, not all research questions can be explored in-depth. Prioritize research efforts that will yield the greatest business impact. Always consider the potential return on investment (ROI) from research. Align the scope and scale of the research to the business outcome it supports.	Make insights actionable: For example, if research reveals that a product feature is underperforming, the next step should be refining or removing it based on user feedback. Communicate effectively: present research insights in a way that's easy to understand. Use data visualizations, user stories, or case studies.	After implementing research-driven changes, measure how they align with the original business goals. Iterate as needed: Business goals often evolve, and so should the research. Continuously monitor both the performance of business initiatives and the relevance of research questions.

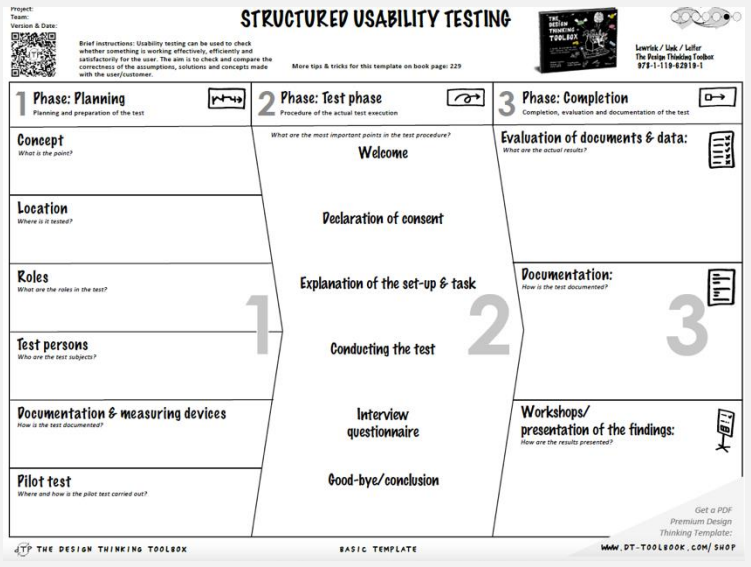
Aligning research methods with business goals

Example: for a B2B startup aiming to improve customer onboarding, the business goal is to **reduce customer churn**. The research method could include:

1. User interviews with newly onboarded customers to identify pain points.
2. Customer journey mapping to pinpoint friction areas during onboarding.
3. Usability testing of the onboarding process to identify inefficiencies.







Differences between B2B and B2C research / why research is crucial for B2B startups, especially post-angel investment / case studies of successful B2B startup companies using design thinking research methods.

Research methods

Measuring, counting and comparing.

- Surveys eg, online and street intercept
- A/B Testing
- Telephone interviews (CATI)
- Longitudinal Studies
- Panel studies
- Conjoint analysis
- Descriptive statistics
- Regression Analysis
- Market Segmentation Studies
- Cluster Sampling and Random Sampling

Observing, recording and deducing.

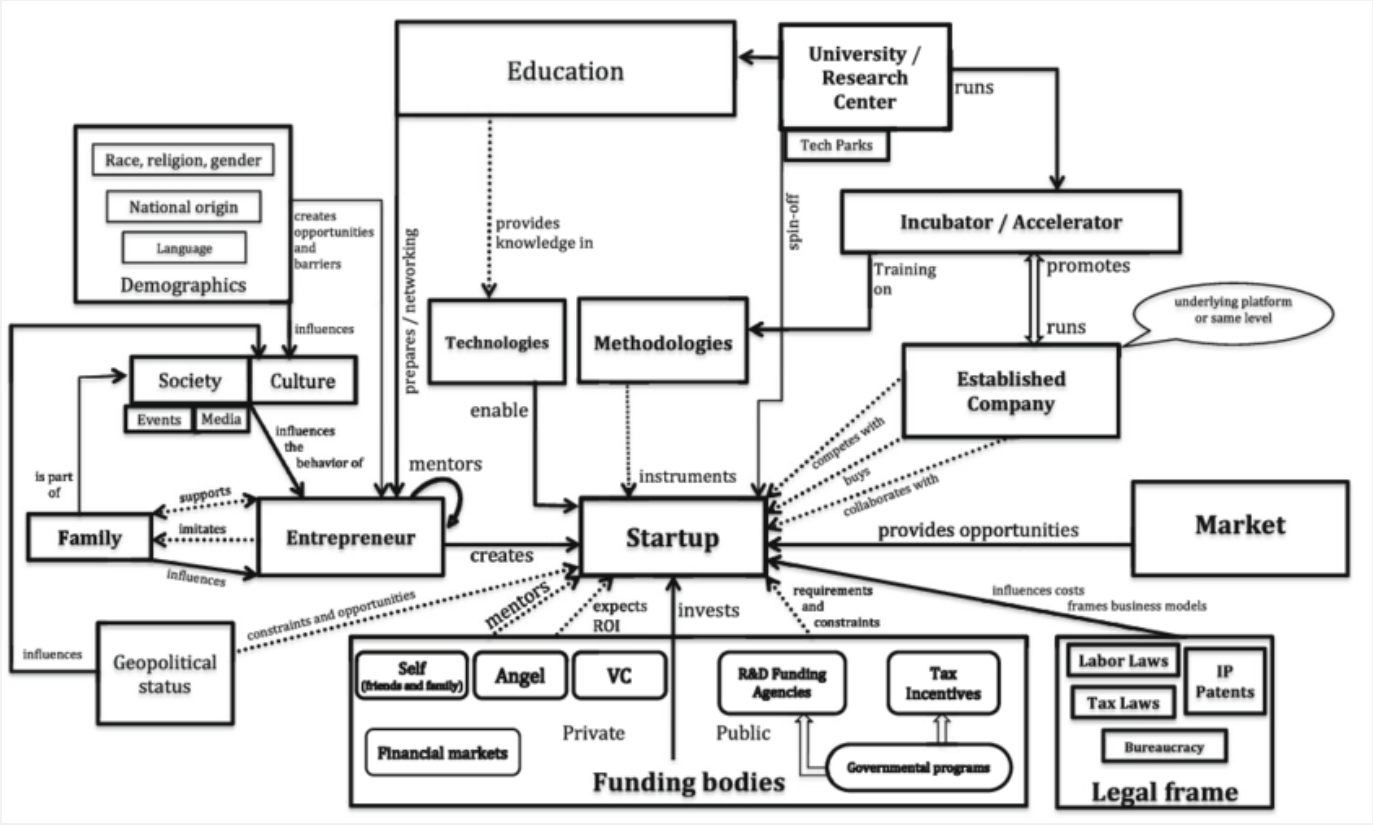
- In-depth interviews (IDIs)
- Focus groups
- Ethnographic research
- Case studies
- Participant observation
- Diaries and journals (cultural probes)
- Narrative inquiry
- Online communities / digital ethnography
- Depth laddering interviews

Differences between B2B and B2C research

Dimension	B2B research	B2C research
Target user	Businesses (decision-makers, influencers, teams)	Individual consumers (mass market)
Purchasing decision	Rational, multi-step process with multiple stakeholders	Emotional, faster, often individual-driven
Sample size	Smaller, specialized, harder to access	Larger, easier to access
Data collection	In-depth, qualitative (e.g, interviews, expert opinions)	Quantitative (eg, surveys, CATI)
Buying cycle	Longer, relationship-focused, repeat business	Shorter, transactional, less loyalty-driven
Motivation factors	ROI, efficiency, cost-saving, long-term benefits	Price, convenience, emotional satisfaction
Research focus	Detailed, technical, focused on business impact	Broad, consumer preferences, lifestyle trends

Why research is crucial for B2B startups

Reducing risk.

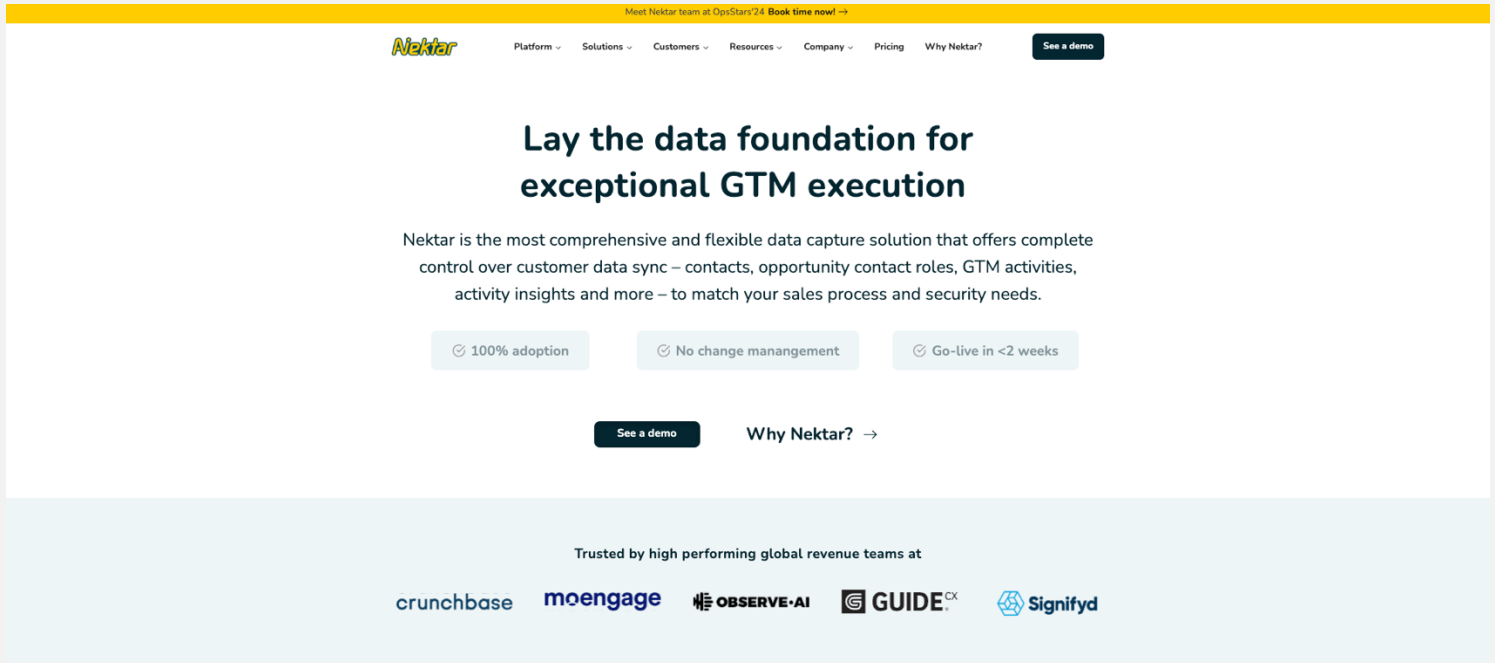


Researchers have to maintain a critical stance and are there to get the facts by being discursive and dogmatic.

Case studies of successful B2B startups using Guerrilla research methods

Funding: SG$8.1m seed

- AI-driven GTM data automation
- SaaS startup that used lean research to refine its product-market fit in the B2B sales space.
- By adopting a “global-first” approach, the company continuously iterated based on direct feedback from users in different international markets.
- This strategy allowed Nektar.ai to rapidly adapt its solutions to meet diverse client needs, particularly across Southeast Asia and beyond.
- www.nektar.ai

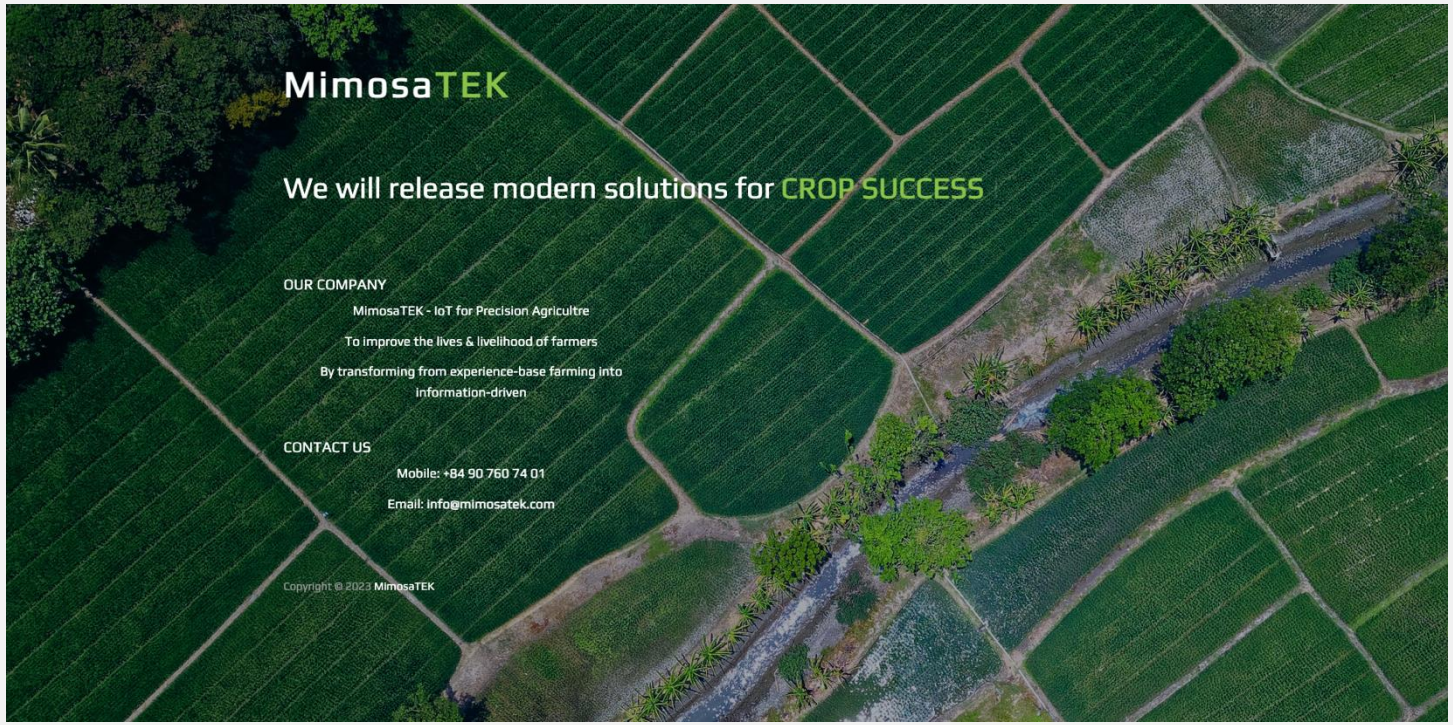


Source: Insignia Business Review, Insignia Ventures Partners (2022)

Case studies of successful B2B startups using Guerrilla research methods

Funding: US$1m, three rounds

- Agriculture technology
- Successfully implemented lean research by piloting its IoT-based solutions with small-scale farmers. Through constant experimentation and feedback collection.
- Adjusted its product to better suit local farming practices. This iterative approach helped the company enhance productivity for farmers, enabling it to grow and gain traction in the agritech sector.
- www.mimosatek.com

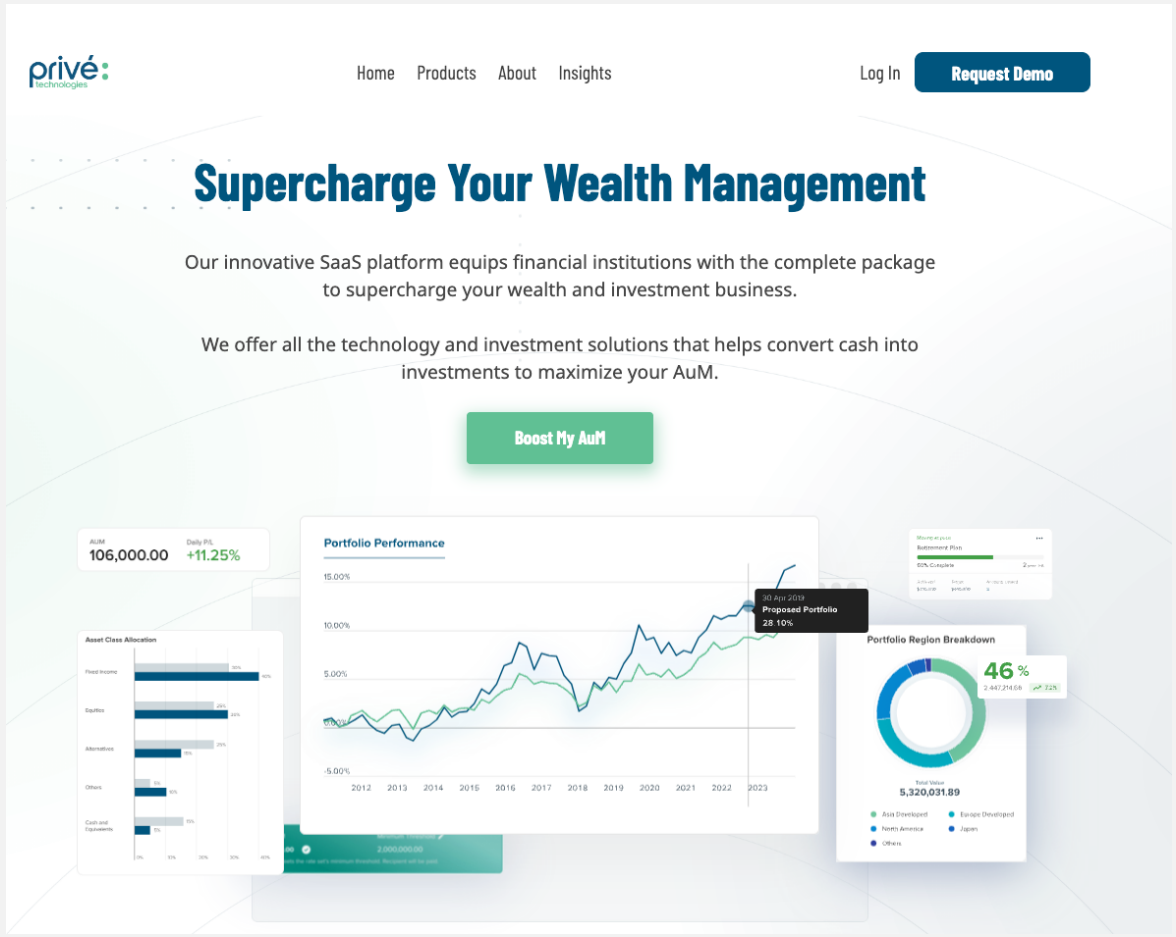


Source: Entrepreneurship in the Asia-Pacific: Case Studies. Springer, (2020)

Case studies of successful B2B startups using Guerrilla research methods

Undisclosed amount.

Series A including Trender and Samsung Venture Investment



- Financial services platform
- One of the fastest growing companies in Asia Pacific.
- leveraged lean research methods to fine-tune its fintech solutions. Through continuous engagement with early adopters, driving rapid customer acquisition and international growth.
- Focus on lean experimentation helped them quickly pivot and improve based on user feedback
- www.privetechnologies.com

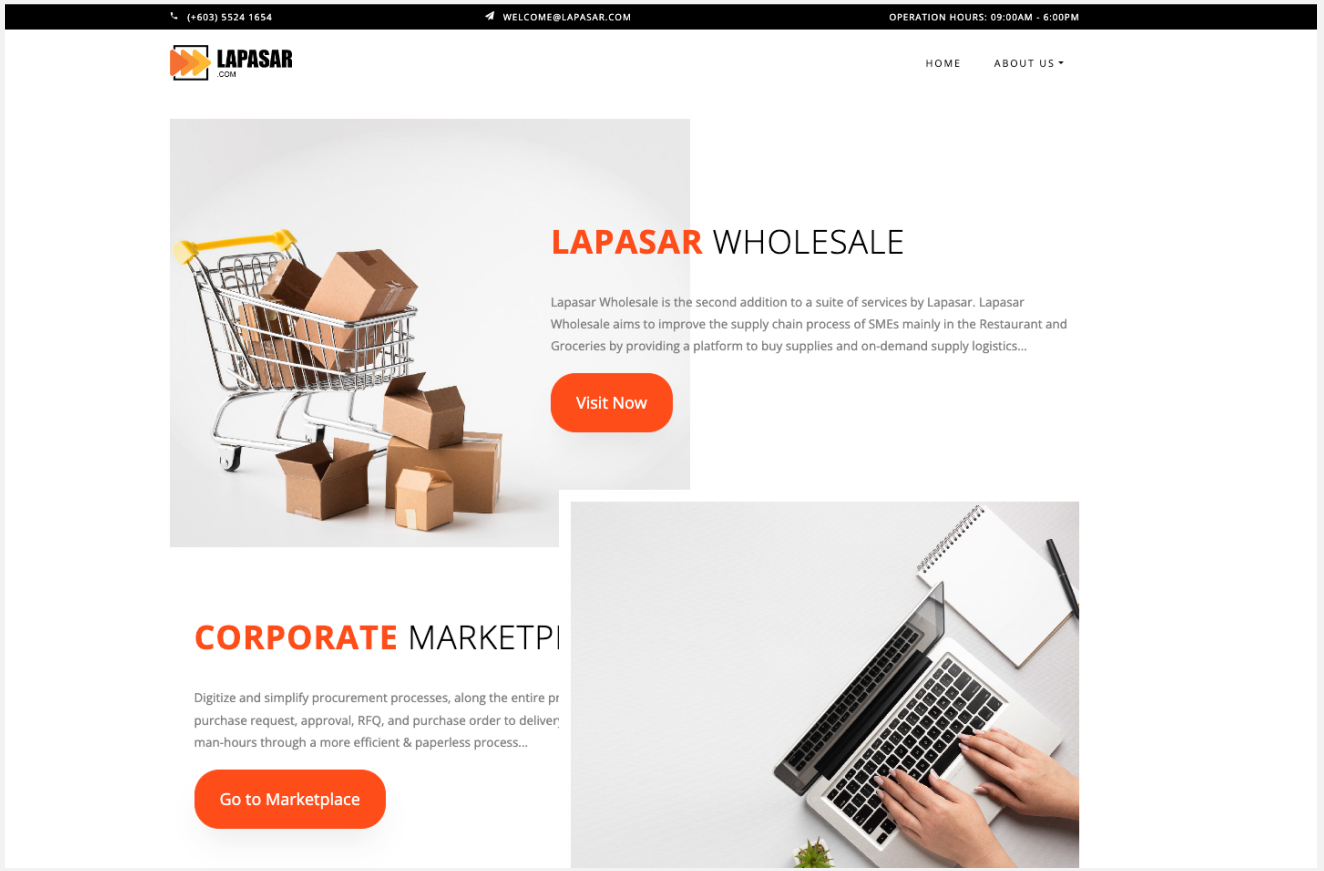
Source: Brew Interactive, 12 of the Best B2B Digital Marketing Case Studies from Asia (2022)

Case studies of successful B2B startups using Guerrilla research methods

Funding: RM7.5 million, fourth round.

Supported by NEXEA, a Malaysian venture capital firm. The company has also previously raised RM400,000 in earlier stages, which helped it scale its revenue from RM50,000 to RM1 million per month within a year.

- Online wholesale platform
- Lapasar used lean, customer-focused research methods and strategic partnerships with major corporates such as TNB and PwC,
- Facilitated by NEXEA's accelerator program. This approach allowed the startup to grow rapidly, scaling its revenue.



Source: mystartupaccelerator.org/case-studies

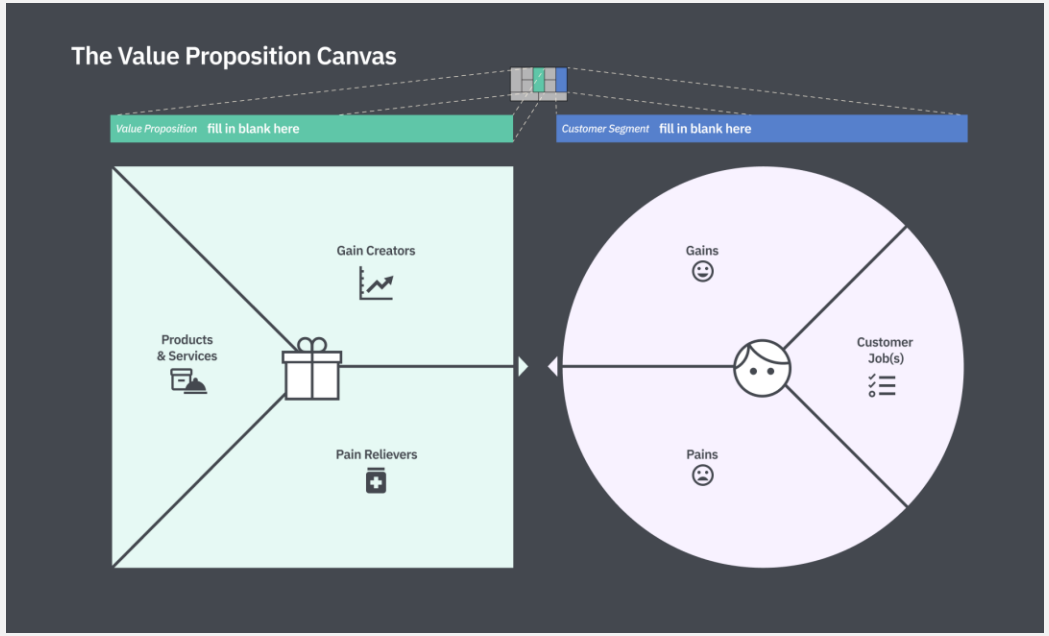
Identifying key stakeholders in B2B (decision-makers, influencers, users) / building empathy maps / conducting effective customer interviews.

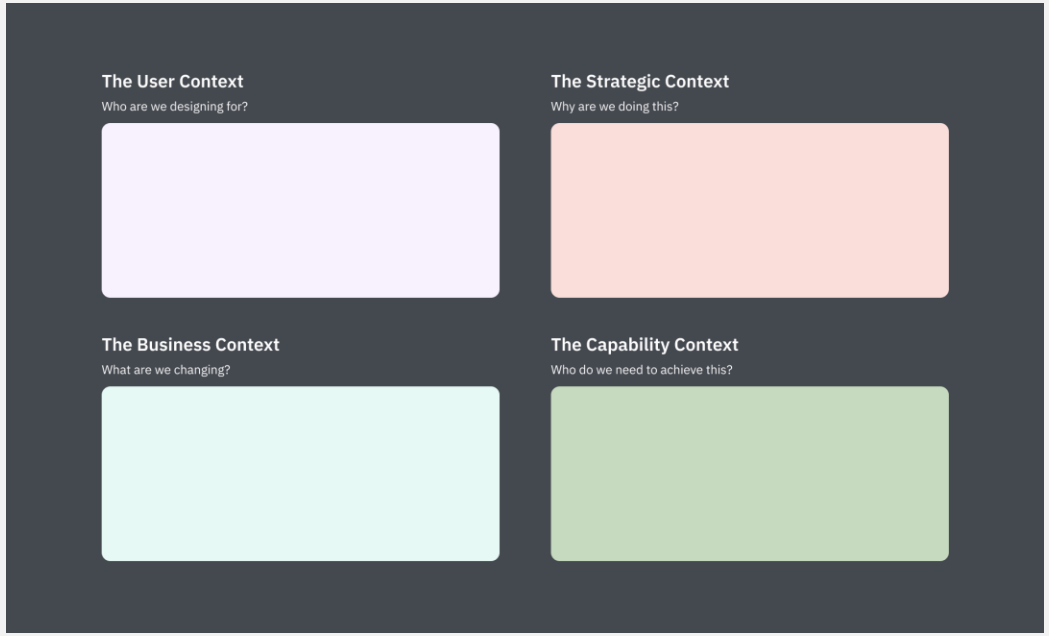
Empathy

The ability to deeply understand and connect with the emotions, needs, and challenges of users, allowing us to create solutions that truly resonate with and address those users' real experiences.

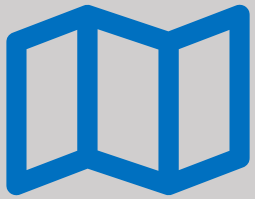
What is customer discovery?

The process of engaging with users to uncover their core needs, behaviours, and pain points, which informs the creation of innovative solutions that are aligned with real-world problems.



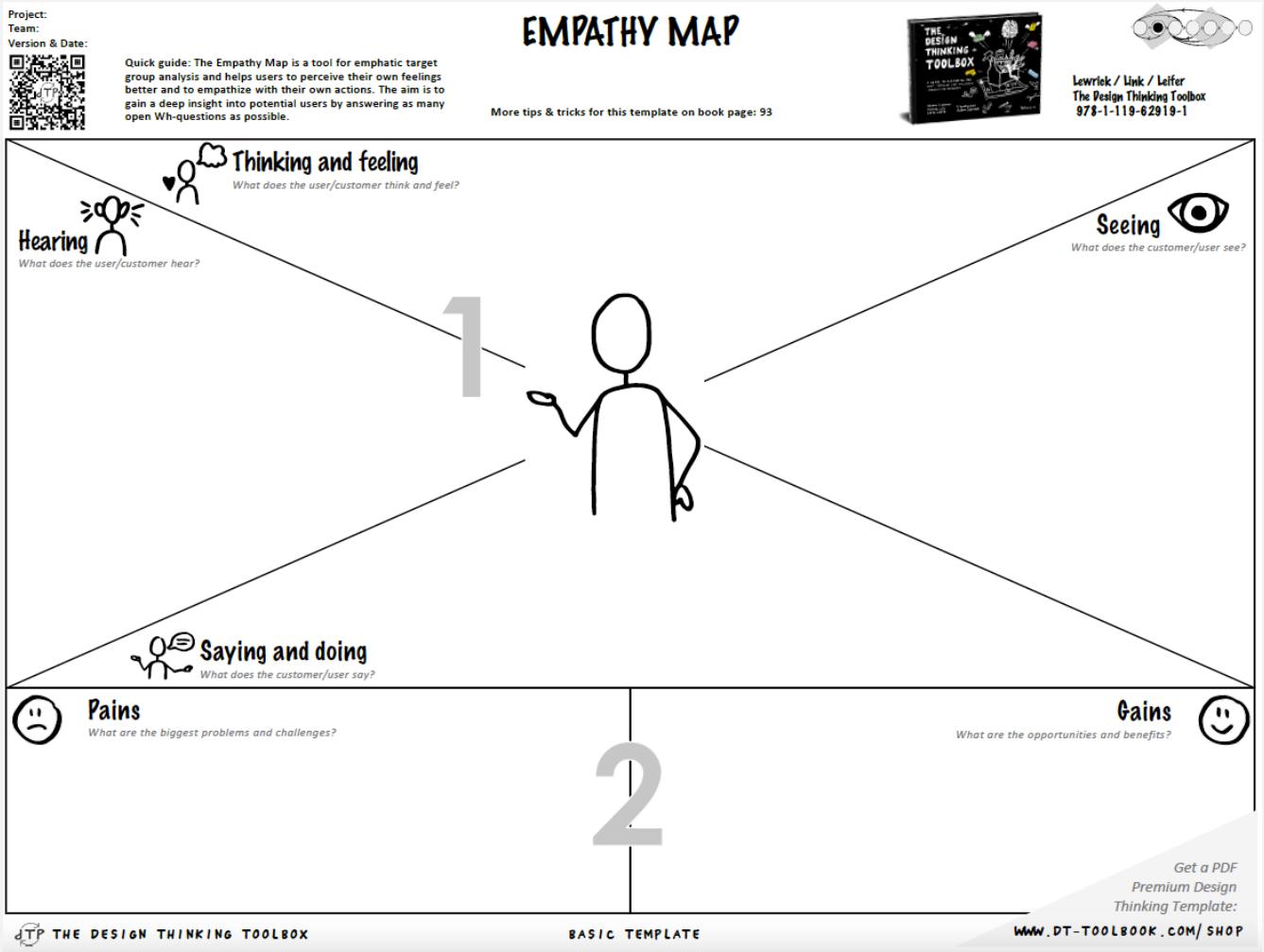


Identifying key stakeholders in B2B

Map the buying process	Engage with multiple business units	Use customer journey mapping	Conduct stakeholder interviews	Leverage CRM data	Prioritize based on impact
					
Identify decision-makers, influencers, and end-users involved at each stage of the B2B purchasing process.	Consider stakeholders from departments like procurement, finance, IT, and operations who influence buying decisions.	Visualize all the touchpoints where stakeholders interact with the product or service to pinpoint key influencers.	Engage directly with various stakeholders to understand their needs, pain points, and decision-making power.	Analyse existing customer relationship management (CRM) data to identify influential roles in previous sales.	Rank stakeholders by their level of influence on the decision-making process and their ability to affect business outcomes.

Building empathy maps

A simple tool used in design thinking to visually represent what a user thinks, feels, says, and does in relation to a product, service, or experience



Prompt the visceral narrative

1. **“Tell me about…”** – encourages storytelling and personal experiences.
2. **“What do you think about…”** – prompts opinions and reflections.
3. **“Can you describe…”** – elicits detailed, descriptive responses.
4. **“How do you feel when…”** – focuses on emotional reactions.
5. **“What challenges have you faced with…”** – identifies pain points and frustrations.
6. **“Why do you prefer…”** – helps uncover motivations and decision-making factors.
7. **“Can you walk me through…”** – asks for step-by-step insights into processes or behaviours.
8. **“What would you change about…”** – highlights areas for improvement.
9. **“How do you typically…”** – gathers information on habits or routines.
10. **“What surprised you about…”** – uncovers unexpected insights or reactions.

Validate the visceral response

1. **Frustrated** – indicates pain points or dissatisfaction.
2. **Excited** – shows enthusiasm or anticipation.
3. **Confused** – highlights areas of uncertainty or complexity.
4. **Anxious** – reveals fear or discomfort.
5. **Relieved** – expresses comfort after a challenge.
6. **Overwhelmed** – suggests something is too much to handle.
7. **Delighted** – reflects positive surprise or joy.
8. **Angry** – indicates strong discontent or anger.
9. **Curious** – shows interest or desire for more information.
10. **Empowered** – reflects feelings of control or confidence.
11. **Embarrassed** – reveals social discomfort or insecurity.
12. **Disappointed** – expresses unmet expectations.
13. **Inspired** – shows a sense of motivation or drive.
14. **Sad** – reflects feelings of loss or emotional hurt.
15. **Grateful** – suggests appreciation or thankfulness.

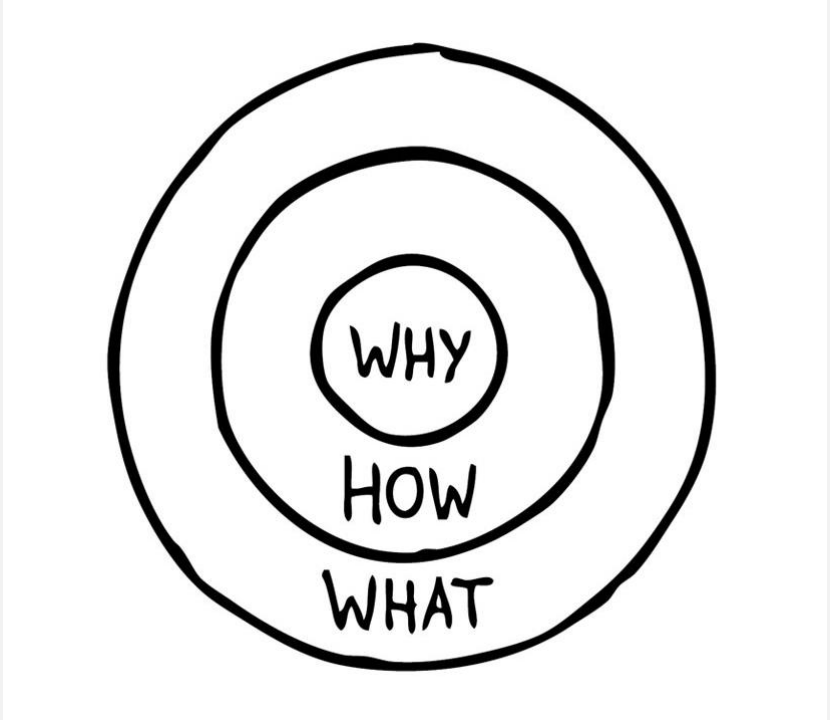
Conducting effective customer interviews

"Like" and "nice" are a red flag.

"Why?"

"Why?"

"Why?"



Emotional response cards

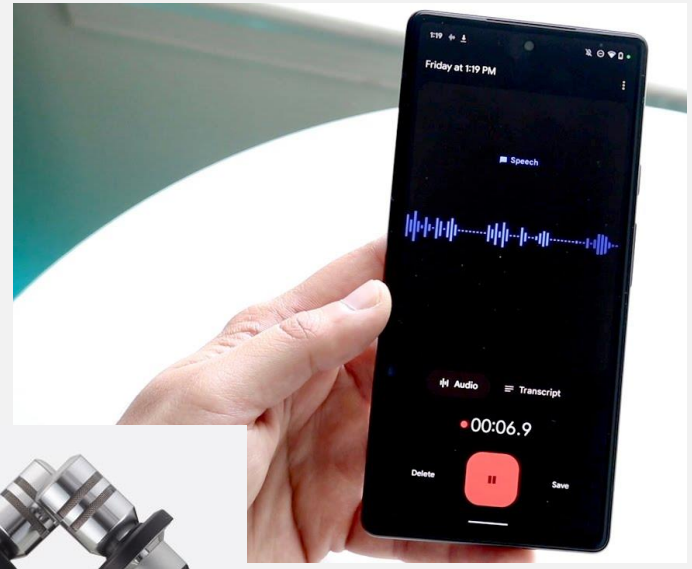
A qualitative tool for empathetic target group analysis.

old	stimulant	appealing	demanding	appealing
thrilling	exceptional	impressive	satisfactorily	cheap
unambiguous	simple	easy to use	intimidating	anticipated
impressive	flexible	kind	frustrating	ordinary
helpful	inconsistent	innovative	intuitive	comfortable
complex	creatively	not valuable	slow	boring

is fun	modern	laborious	new	not relevant
beneficial	personal	professional	relevant	unruffled
swift	difficult to apply	difficult	sure	useful
solid	stressful	comprehensive	unattractive	unwanted
unconventionally	unprofessional	vital	trustworthy	intimate
disheveling	predictable	valuable	time-consuming	time-sa

Tools and techniques / persona's development / journey mapping in a B2B context / primary and secondary research

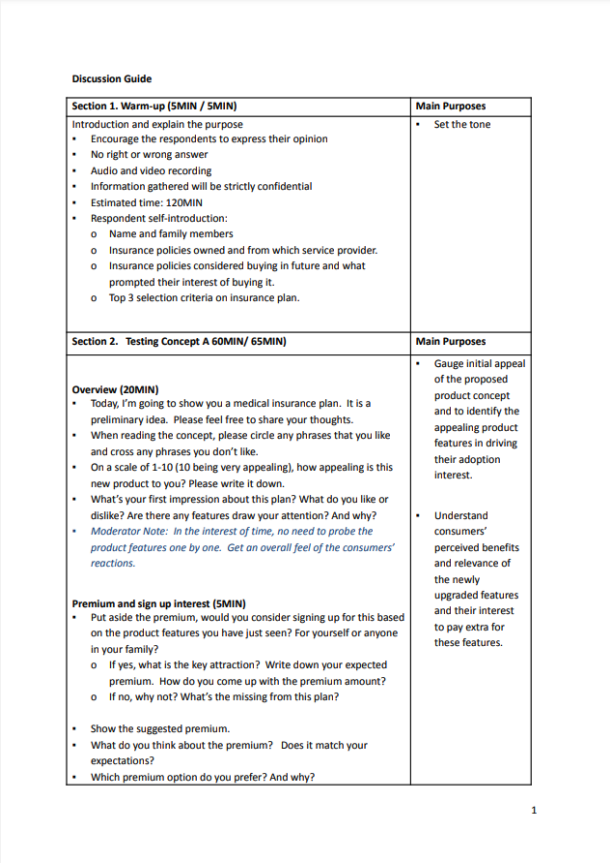
Design thinking Guerrilla research toolbox



Qualitative tools and techniques

Interviews	Focus groups	Observation	Surveys and open-ended questions	Field notes and journaling	Case studies	Document and content analysis	Ethnography
In-depth Interviews (IDIs): one-on-one conversations to explore personal experiences, motivations, and attitudes.	Facilitated discussions with small groups to gather insights on collective experiences, attitudes, or perceptions.	**Participant observation:** researcher actively engages in the environment to observe behaviours and interactions.	Use of open-ended questions in surveys to gather subjective data and personal stories. Eg, NPS. "Can you tell us why you chose this…?"	Recording observations, reflections, and insights during research activities for later analysis.	In-depth analysis of individuals, groups, or situations to understand complex issues within real-world contexts.	Reviewing existing documents, media, or online content to extract patterns, themes, and meaning.	Extended immersion in the research setting to gain deep understanding of cultures, environments, or communities.
Semi-structured interviews: flexible framework with pre-defined questions but room for probing deeper.		**Non-participant observation:** Researcher observes without direct interaction to avoid influencing the environment.					

Indicative discussion guide for a semi-structured interview

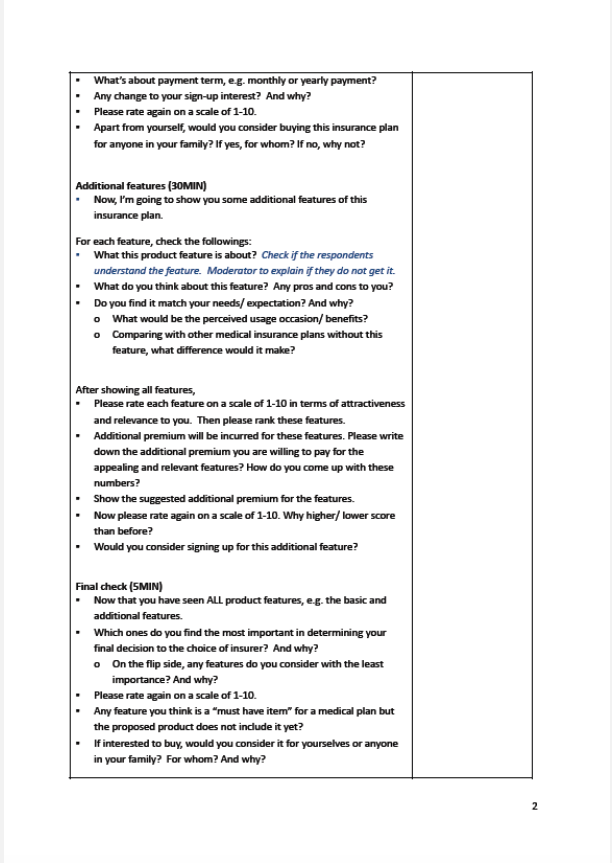


Discussion Guide

Section 1. Warm-up (5MIN / 5MIN)	Main Purposes
Introduction and explain the purpose • Encourage the respondents to express their opinion • No right or wrong answer • Audio and video recording • Information gathered will be strictly confidential • Estimated time: 120MIN • Respondent self-introduction: o Name and family members o Insurance policies owned and from which service provider. o Insurance policies considered buying in future and what prompted their interest of buying it. o Top 3 selection criteria on insurance plan.	• Set the tone
Section 2. Testing Concept A 60MIN/ 65MIN)	**Main Purposes**
Overview (20MIN) • Today, I'm going to show you a medical insurance plan. It is a preliminary idea. Please feel free to share your thoughts. • When reading the concept, please circle any phrases that you like and cross any phrases you don't like. • On a scale of 1-10 (10 being very appealing), how appealing is this new product to you? Please write it down. • What's your first impression about this plan? What do you like or dislike? Are there any features draw your attention? And why? • *Moderator Note: In the interest of time, no need to probe the product features one by one. Get an overall feel of the consumers' reactions.* **Premium and sign up interest (5MIN)** • Put aside the premium, would you consider signing up for this based on the product features you have just seen? For yourself or anyone in your family? o If yes, what is the key attraction? Write down your expected premium. How do you come up with the premium amount? o If no, why not? What's the missing from this plan? • Show the suggested premium. • What do you think about the premium? Does it match your expectations? • Which premium option do you prefer? And why?	• Gauge initial appeal of the proposed product concept and to identify the appealing product features in driving their adoption interest. • Understand consumers' perceived benefits and relevance of the newly upgraded features and their interest to pay extra for these features.

1

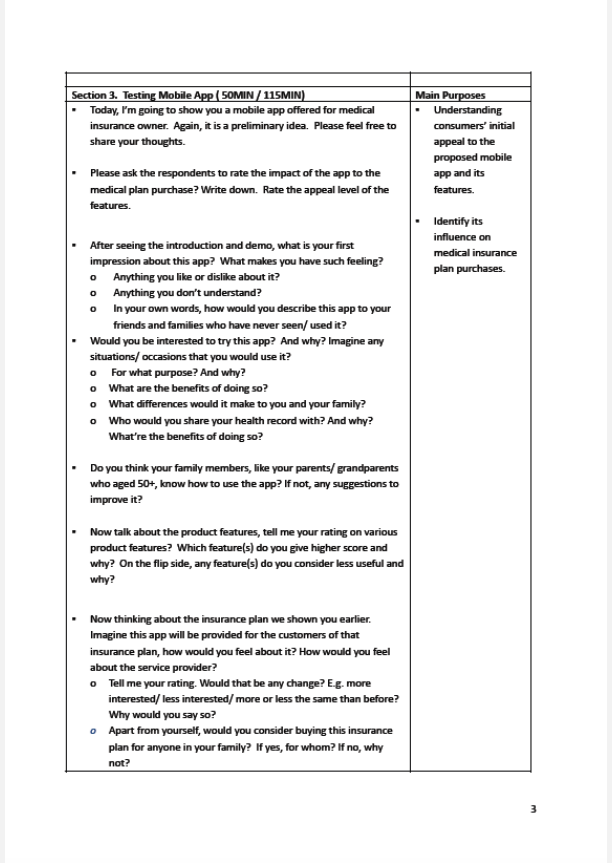
- Warm up
- Part 1



• What's about payment term, e.g. monthly or yearly payment? • Any change to your sign-up interest? And why? • Please rate again on a scale of 1-10. • Apart from yourself, would you consider buying this insurance plan for anyone in your family? If yes, for whom? If no, why not? **Additional features (30MIN)** • Now, I'm going to show you some additional features of this insurance plan. For each feature, check the followings: • What this product feature is about? *Check if the respondents understand the feature. Moderator to explain if they do not get it.* • What do you think about this feature? Any pros and cons to you? • Do you find it match your needs/ expectation? And why? o What would be the perceived usage occasion/ benefits? o Comparing with other medical insurance plans without this feature, what difference would it make? After showing all features, • Please rate each feature on a scale of 1-10 in terms of attractiveness and relevance to you. Then please rank these features. • Additional premium will be incurred for these features. Please write down the additional premium you are willing to pay for the appealing and relevant features? How do you come up with these numbers? • Show the suggested additional premium for the features. • Now please rate again on a scale of 1-10. Why higher/ lower score than before? • Would you consider signing up for this additional feature? **Final check (5MIN)** • Now that you have seen ALL product features, e.g. the basic and additional features. • Which ones do you find the most important in determining your final decision to the choice of insurer? And why? o On the flip side, any features do you consider with the least importance? And why? • Please rate again on a scale of 1-10. • Any feature you think is a "must have item" for a medical plan but the proposed product does not include it yet? • If interested to buy, would you consider it for yourselves or anyone in your family? For whom? And why?	

2

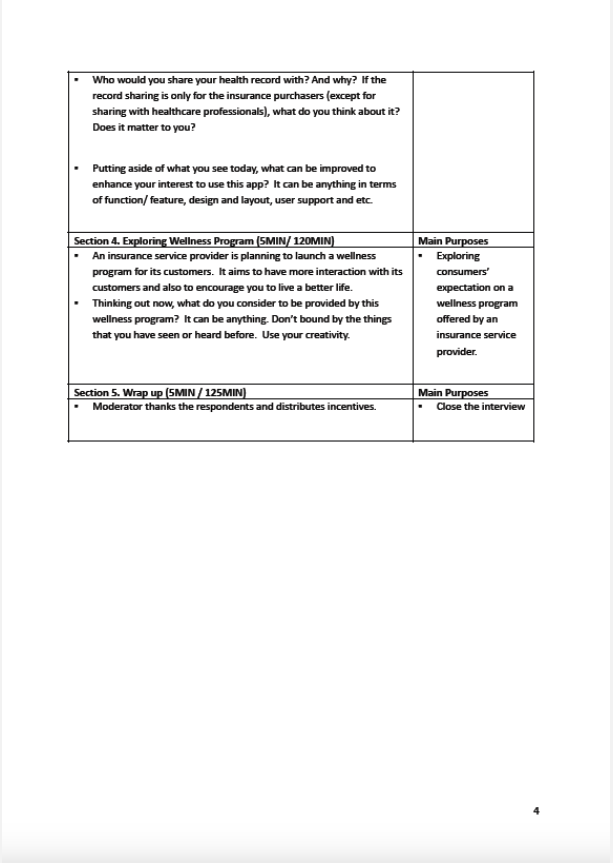
- Part 1



Section 3. Testing Mobile App (50MIN / 115MIN)	Main Purposes
• Today, I'm going to show you a mobile app offered for medical insurance owner. Again, it is a preliminary idea. Please feel free to share your thoughts. • Please ask the respondents to rate the impact of the app to the medical plan purchase? Write down. Rate the appeal level of the features. • After seeing the introduction and demo, what is your first impression about this app? What makes you have such feeling? o Anything you like or dislike about it? o Anything you don't understand? o In your own words, how would you describe this app to your friends and families who have never seen/ used it? • Would you be interested to try this app? And why? Imagine any situations/ occasions that you would use it? o For what purpose? And why? o What are the benefits of doing so? o What differences would it make to you and your family? o Who would you share your health record with? And why? What're the benefits of doing so? • Do you think your family members, like your parents/ grandparents who aged 50+, know how to use the app? If not, any suggestions to improve it? • Now talk about the product features, tell me your rating on various product features? Which feature(s) do you give higher score and why? On the flip side, any feature(s) do you consider less useful and why? • Now thinking about the insurance plan we shown you earlier. Imagine this app will be provided for the customers of that insurance plan, how would you feel about it? How would you feel about the service provider? o Tell me your rating. Would that be any change? E.g. more interested/ less interested/ more or less the same than before? Why would you say so? o Apart from yourself, would you consider buying this insurance plan for anyone in your family? If yes, for whom? If no, why not?	• Understanding consumers' initial appeal to the proposed mobile app and its features. • Identify its influence on medical insurance plan purchases.

3

- Part 2



• Who would you share your health record with? And why? If the record sharing is only for the insurance purchasers (except for sharing with healthcare professionals), what do you think about it? Does it matter to you? • Putting aside of what you see today, what can be improved to enhance your interest to use this app? It can be anything in terms of function/ feature, design and layout, user support and etc.	
Section 4. Exploring Wellness Program (5MIN/ 120MIN)	**Main Purposes**
• An insurance service provider is planning to launch a wellness program for its customers. It aims to have more interaction with its customers and also to encourage you to live a better life. • Thinking out now, what do you consider to be provided by this wellness program? It can be anything. Don't bound by the things that you have seen or heard before. Use your creativity.	• Exploring consumers' expectation on a wellness program offered by an insurance service provider.
Section 5. Wrap up (5MIN / 125MIN)	**Main Purposes**
• Moderator thanks the respondents and distributes incentives.	• Close the interview

4

- Part 3
- Wrap up

CIMIGO

Courtesy of Cimigo Consulting

Persona’s development

Vivid persona sample

Story

Manee is a low-income mother from Nongyibao village located in the western part of Udonthani Province in Northeastern Thailand. She lives with her family consisting of her mother, her husband, and her son. Due to her family's financial income constraints, Manee did not receive education beyond school. She currently works as a production worker in the food and drink industry. She spends most of her time working to support her family, especially her son's education. She also assists her mother with household chores.

Goals

Saving for her son's higher education

Balancing time at home and work

Wants

Less intense workload

A higher paying career

Needs

Having a stable occupation

Being debt-free

Living a healthier lifestyle

Fears

Unemployment

Increasing debt

Fatal illness

Manee Thongsuk

Position
Production worker

Industry
Food and drink

Education
Tenth grade

Location
Udonthani, TH

Age
27

Daily

Assembling products

Maintaining equipment

School run for her son

Often

Doing house chores

Visiting village temple

Seldom

Taking her mother to hospital for medical checkup

Cooking

Low-fidelity persona profile

roject:
eam:
ersion & Date:

PERSONA/USER PROFILES

Quick Guide: The description of a typical person who is a potential user/customer of a solution helps to maintain a consistent understanding of a target audience. The persona is named and described as precisely as possible.

More tips & tricks for this template on book page: 97

Lewrick / Link / Leifer
The Design Thinking Toolbox
978-1-119-62919-1

Name of persona
Determine name, sex and age.
Add more attributes.

Description of the persona
Describe the fictitious character.
1

Moodboard/sketch
Do a moodboard or draw a sketch that visualizes the user/customer
6

Jobs to be done
Which tasks are supported by the product?
2

Influencer
Who are the influencers
7

Problems/pains
What are the difficulties, problems, frustrations, pains?
4

Trends
What are the driving forces and trends (in future)?
8

Use cases/application scenario
Describe all use cases in the context of the problem
3

Gains
What makes the user happy?
5

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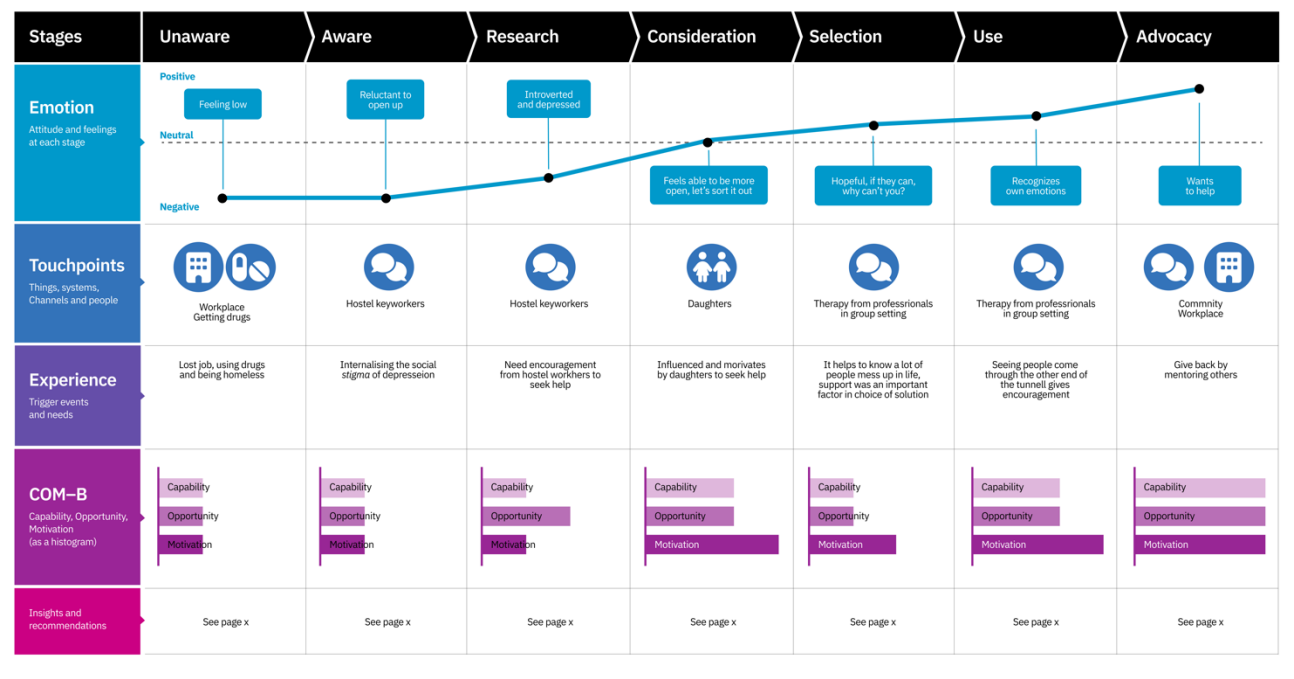
THE DESIGN THINKING TOOLBOX BASIC TEMPLATE

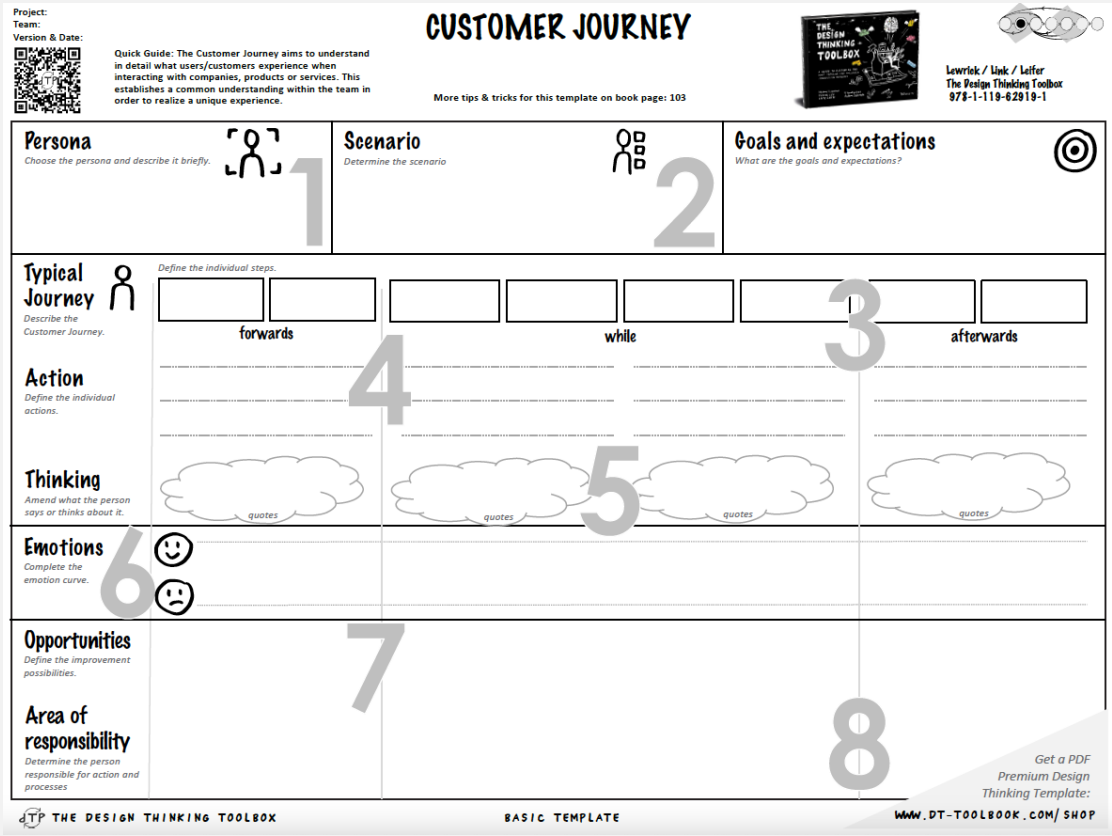
If you want to understand the animals, get out into the jungle.

Journey mapping in a B2B context

High-fidelity customer experience map



Low-fidelity customer journey



Pros and cons of primary vs. secondary research

Research type	Pros	Cons
Primary research		
	Provides specific, tailored insights.	Time-consuming and potentially expensive to conduct.
	Directly addresses your research question.	Requires more resources and expertise.
	Offers current, real-time data.	Can be influenced by researcher bias.
Secondary research		
	Quick and cost-effective.	May be outdated or not fully relevant.
	Readily available from various sources	Lacks customisation to your specific needs.
	Useful for background information and trends.	May not address all aspects of the research question.
		Limited ability to verify accuracy.
		Data quality varies based on source.

What is the question I am trying to answer?

1. What's happening around the edges of my questions?
2. Structured and semi-structured interviews.
3. How to document qualitative methods?
4. Take a separate position than that of the world view.
5. We don't have to work in a linear fashion.

Asking appropriate questions to the relevant individuals / removing bias / ethical considerations.

Asking appropriate questions to the relevant individuals






	Understanding the research objective	Identifying key stakeholders	Design open-ended questions	Aligning questions to the participant's expertise	Probing for deeper insights	Ethical considerations
Goal:	Align questions with the purpose of your research.	Pinpoint the relevant individuals who can provide the most valuable insights.	Encourage detailed responses by using open-ended rather than closed questions.	Customise questions based on the role and knowledge of the interviewee.	Use follow-up questions to clarify responses and explore underlying reasons or emotions.	Ensure your questions are respectful, unbiased, and sensitive to personal or cultural differences.
Tip:	Start by clarifying what insights you need to gain. For example, are you exploring experiences, motivations, or decision-making processes?	Use stakeholder mapping or a persona framework to identify diverse perspectives, ensuring coverage across roles, experiences, and influence within the organisation.	Begin questions with "How," "What," or "Why" to elicit thoughtful answers that go beyond simple facts.	Avoid asking overly technical questions to non-technical respondents or oversimplified questions to experts. Example: Ask end users about their experiences, while asking managers about decision-making processes.	Use phrases like "Can you tell me more about that?" or "Why do you think that is?" to dig deeper.	Be mindful of language and tone, avoiding leading questions that might skew results. Example: Instead of, "Don't you think X is the best option?" ask, "What do you think about X?"
Visual aid:	Simple graphic or flowchart illustrating alignment between objectives and question design.	Stakeholder map highlighting different roles (eg, users, decision-makers, influencers).	Bullet point examples comparing open-ended and closed questions.		Flowchart demonstrating how follow-up questions can expand the initial response.	

Recognising common biases

	Confirmation bias	Leading question bias	Interviewer bias	Sampling bias
	The tendency to seek information that confirms pre-existing beliefs.	Asking questions that suggest a preferred answer.	Allowing personal opinions or reactions to influence responses.	Selecting participants who are not representative of the broader group.
Bias example:	"Most people said they found the new process more efficient. Do you agree with that?"	"You'd agree that the new system has made things much easier, wouldn't you?"	(Interviewer's body language shows excitement) "That sounds like a really great improvement! How much do you like the new tool?"	Interviewing only senior executives about a change that affects the entire company and then concluding that the entire workforce is satisfied.
Neutral example:	"How has the new process affected your work?"	"What has been your experience with the new system?"	(Neutral tone and body language) "Can you describe your experience using the new tool?"	Ensuring a diverse sample by interviewing employees from different departments, levels, and backgrounds to get a comprehensive view of the impact.

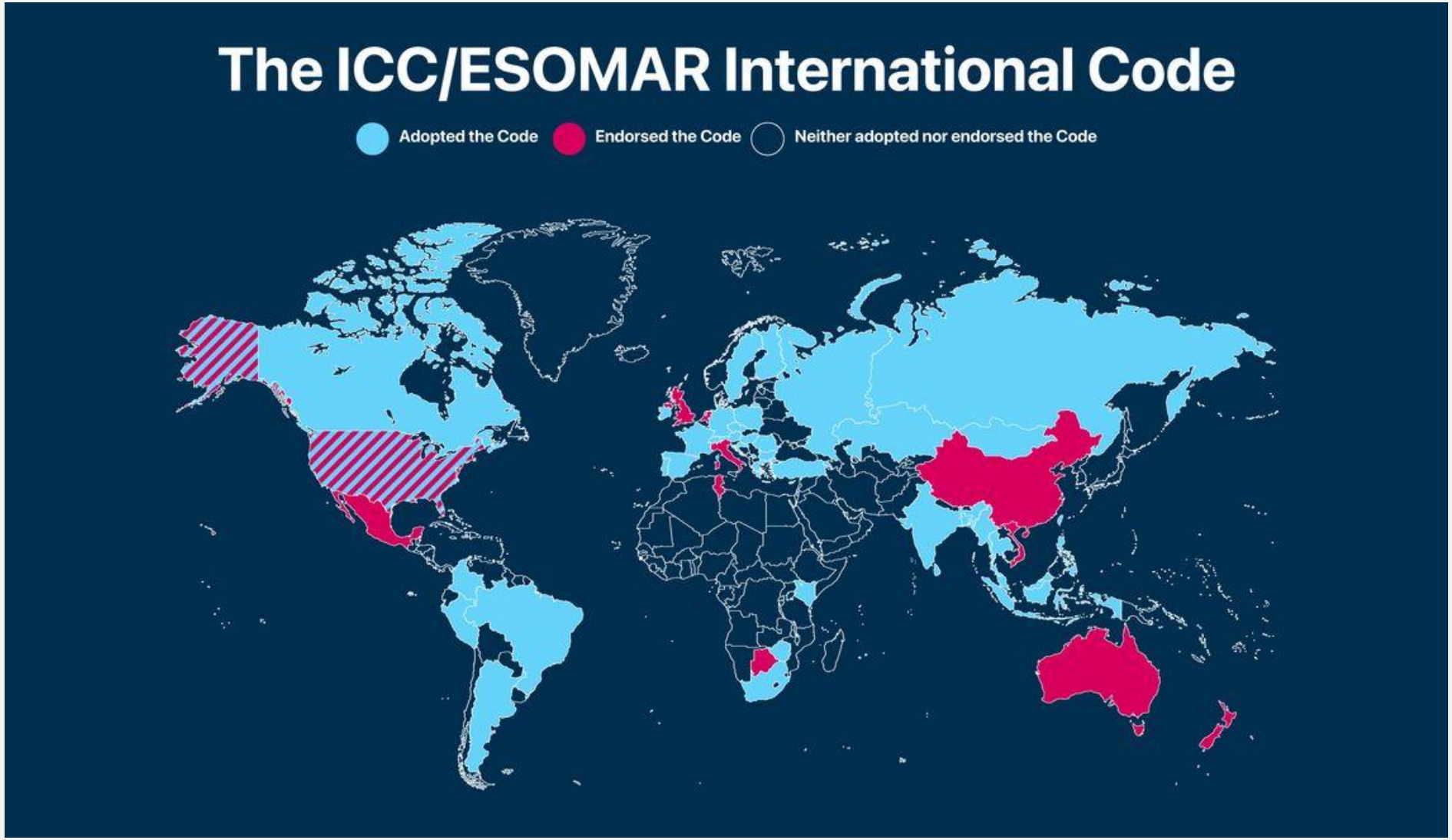
Removing bias

	Natural language in question design	Avoiding assumptions	Balancing participant representation	Minimising interviewer influence	Using triangulation to validate findings	Blind or double-blind techniques
Goal:	Craft questions that do not lead or suggest answers.	Approach each interview with an open mind, without making assumptions about the participant's experience.	Ensure diversity in the participant pool to avoid skewed perspectives.	Reduce the impact of the interviewer's own behaviour and body language.	Cross-check data from multiple sources or methods to ensure findings are unbiased.	Implement techniques to minimize bias during interviews.
Tip:	Avoid emotionally charged or loaded language.	Frame questions to explore experiences and opinions, rather than confirming assumptions.	Use quota sampling or purposeful sampling to ensure a balanced representation of key groups (eg, different departments, age groups, backgrounds).	Maintain a neutral tone and demeanour, avoid leading body language or facial expressions that may hint approval or disapproval. Stay composed and neutral, even if the response is unexpected or controversial.	Use a combination of interviews, observations, and documents to corroborate results.	Consider using blind or double-blind interviews where either the interviewer or both parties are unaware of certain contextual details that might influence responses.

Ethical considerations

- Clear standards of professional conduct
- Fairness
- Avoid conflicts of interest
- Informed consent form if necessary
- Avoid prejudice
- Participants need to be aware of the research

Ethical considerations

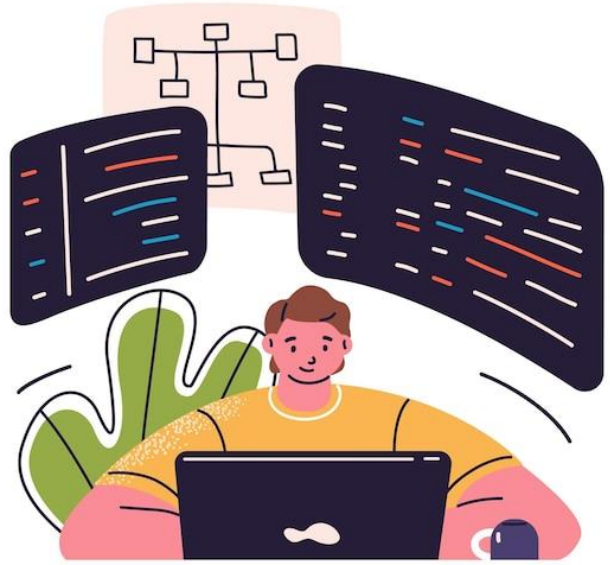


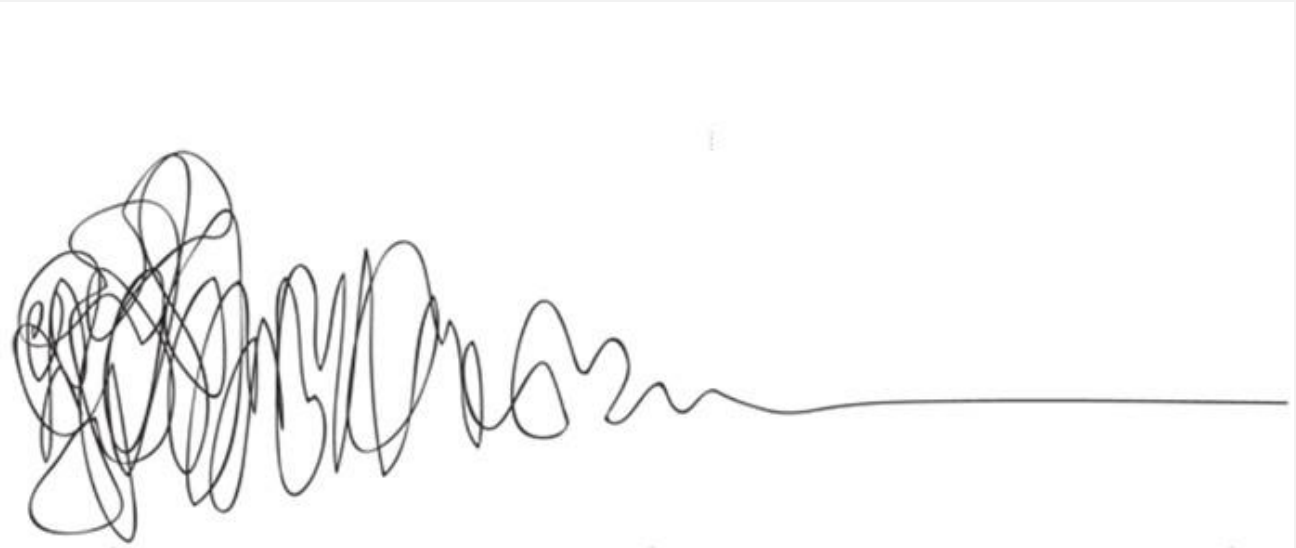
ESOMAR's guidelines are widely recognised for setting the ethical standards for market, opinion, and social research.

Synthesizing research / turning raw data into actionable insights / how to frame a problem statement that resonates with B2B stakeholders.

Synthesizing research

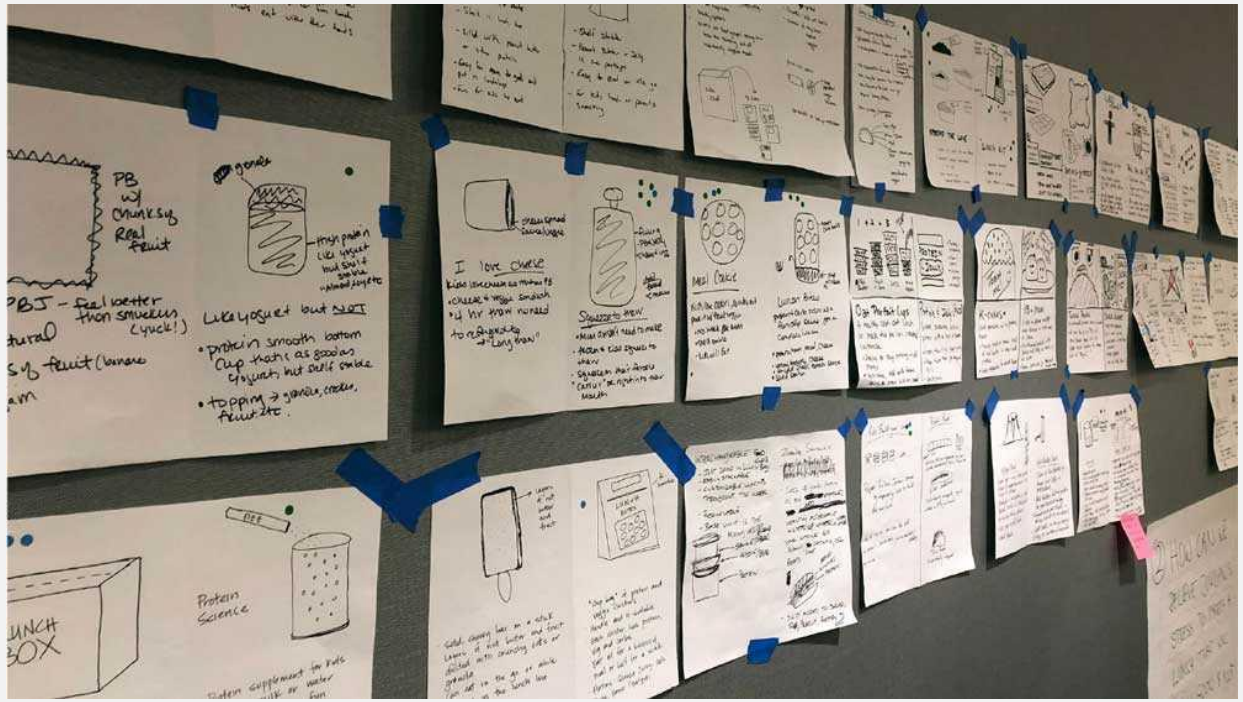
Familiarisation with the data	Coding the data	Identifying patterns and themes
• Review all transcripts, notes, and materials. • Take time to deeply immerse yourself in the data. • Note initial impressions or recurring themes.	• Use thematic coding to organize the data. • Label key ideas, phrases, and insights with codes. • Group similar codes into broader categories.	• Look for relationships, similarities, or differences within the codes. • Identify major themes that answer your research questions. • Prioritize themes based on frequency, impact, and relevance.





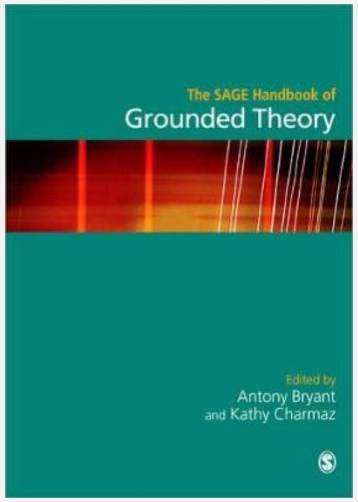
Techniques

Concept Mapping	Framework matrices	Data triangulation	Ensure objectivity
• Visualize connections between themes. • Create diagrams or flowcharts that show relationships.	• Use a matrix to compare themes across different data sources or participants. • Helps structure and organize complex data.	• Compare data from different methods or sources (interviews, focus groups, observations) to validate findings. • Ensures a comprehensive synthesis.	• Regularly revisit the data to check for bias. • Collaborate with colleagues or co-researchers for multiple perspectives. • Use data triangulation to strengthen findings.



Coding the data

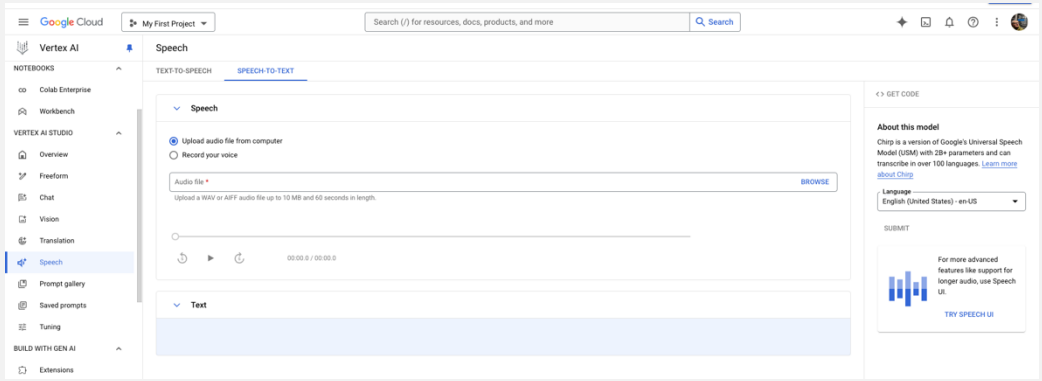
Traditional



GTM (Grounded Theory Methodology)

The hack

+

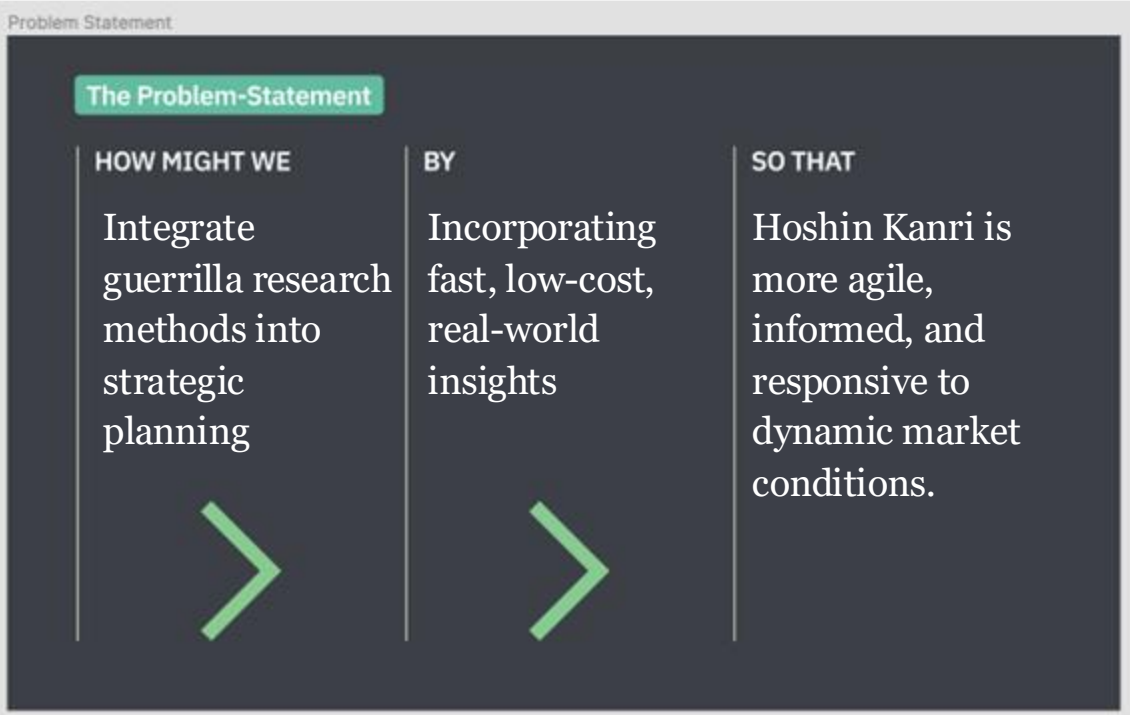


Speech to text
(Natural Language Processing)

Turning raw data into actionable insights

Identify the core findings	Contextualize the Data	Ask “so what?”	Translate insights into recommendations	Prioritize actionable steps	Align with business or research objectives
• Start with the major themes and patterns from the synthesis process. • Prioritize findings that directly align with your research objectives or business needs.	• Place the synthesized themes within the broader business or research context. • Consider how the findings address real-world challenges or opportunities.	• For each theme or pattern, ask what it means for the stakeholders. • How can this insight drive a decision, solve a problem, or influence a strategy?	• Develop clear, targeted recommendations based on the key insights. • Ensure recommendations are specific, relevant, and feasible.	• Rank recommendations by importance and impact. • Highlight quick wins versus long-term strategic changes.	• Tie each actionable insight to an organizational or research goal. • Demonstrate how applying the insight will achieve desired outcomes.

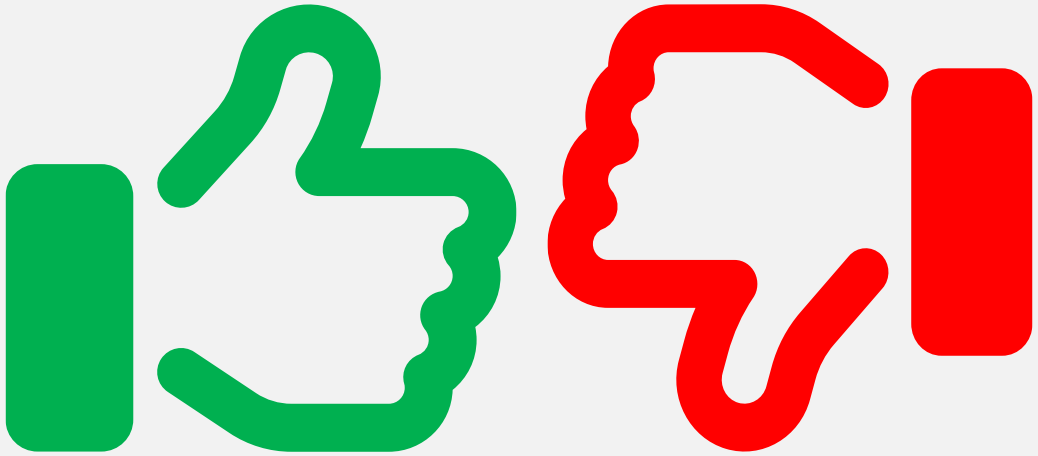
How to frame a problem statement



Lean validation techniques / conducting surveys / A/B testing / pilot programs / the role of qualitative and quantitative data in B2B validation.

Lean validation techniques

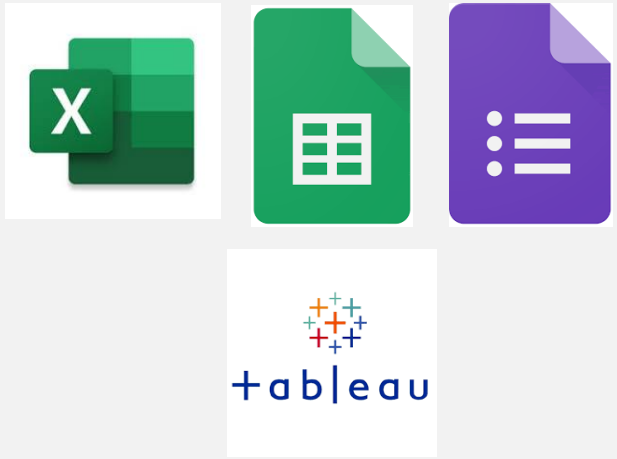
Lean validation involves quickly testing assumptions with minimal resources to confirm or invalidate key insights before committing more resources.



Lean validation techniques

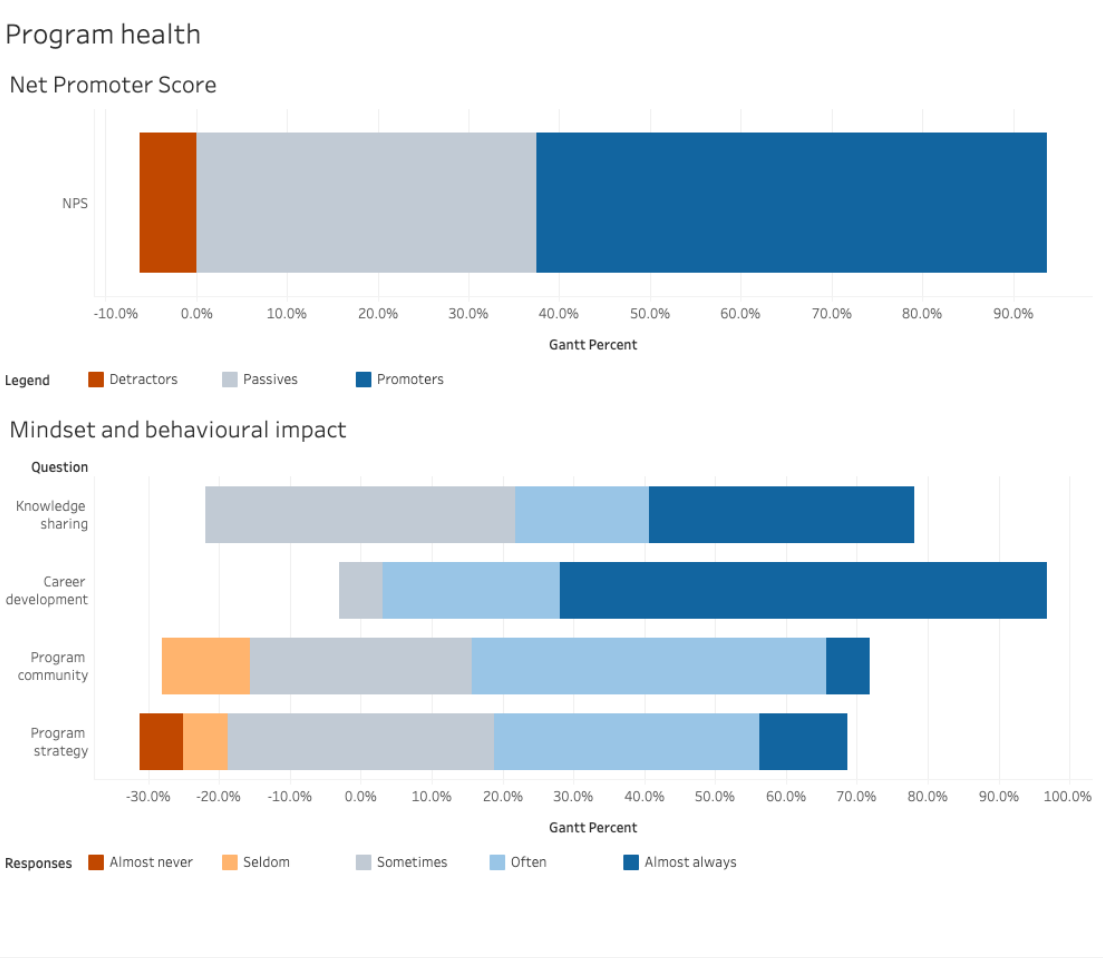
	Customer interviews	Usability testing (prototype testing)	Problem interviews	MVP (Minimum Viable Product)
Purpose:	Validate assumptions by talking directly to users.	Test the effectiveness of a low-fidelity prototype.	Validate whether the problem identified through synthesis resonates with users.	Manually provide a simplified version of your solution.
Method:	Conduct brief, structured interviews to gather feedback on key insights.	Observe user interaction with a simple prototype to evaluate pain points.	Focus interviews on discussing the problem rather than offering solutions.	Deliver the service yourself to test user demand.
Validation:	Are the themes or problems you identified real and relevant to the customer?	Does the solution based on your insights solve the users' needs?	Is this problem truly significant in the users' experience?	Is there interest or demand for the solution derived from your insights?

Key steps in analysing survey data eg, NPS



Data cleaning	Descriptive statistics	Categorizing qualitative responses
• **Remove incomplete responses**: exclude incomplete or nonsensical responses to ensure data quality. • **Normalize responses**: ensure consistency in formats (eg, numbers, dates). • **Check for outliers**: identify and assess any extreme values that could skew results.	• **Summarize the data**: calculate means, medians, and percentages to get an overview. • **Frequency distributions**: visualize how often each response appears to see common trends. • **Cross-tabulation**: compare different variables to find relationships (eg, age vs. satisfaction level).	• **Thematic coding**: group open-ended responses into categories or themes. • **Identify patterns**: look for common phrases or sentiments that appear across responses. • **Sentiment analysis**: gauge whether feedback is positive, negative, or neutral to provide context.

Key steps in presenting and visualising survey data



Use charts and graphs for visual vocabulary	Simplify Complex Data
• **Bar charts and pie charts**: show distributions or proportions of survey responses. • **Heatmaps**: display correlations between variables visually. • **Word clouds**: represent the frequency of keywords in qualitative responses.	• Focus on clear and easy-to-understand visuals that highlight the most important insights. • Avoid overwhelming the audience with too many complex visuals at once.

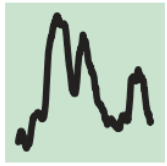
Quantitative visual vocabulary

Change over Time

Give emphasis to changing trends. These can be short (intra-day) movements or extended series traversing decades or centuries: Choosing the correct time period is important to provide suitable context for the reader.

Example FT uses
Share price movements, economic time series, sectoral changes in a market

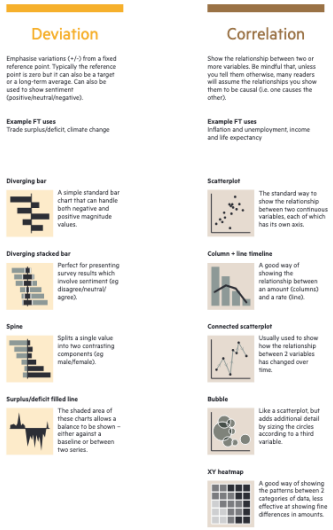
Line



The standard way to show a changing time series. If data are irregular, consider markers to represent data points.

Column

Columns work well for showing change over time - but usually best with only one series of data at a time.



Visual vocabulary

Designing with data

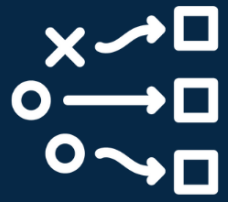
There are so many ways to visualise data - how do we know which one to pick? Use the categories across the top to decide which data relationship is most important in your story, then look at the different types of chart within the category to form some initial ideas about what might work best. This list is not meant to be exhaustive, nor a wizard, but is a useful starting point for making informative and meaningful data visualisations.

FT graphic: Alan Smith; Chris Campbell; Ian Bott; Liz Faunce; Graham Parrish; Billy Ehrenberg-Shannon; Paul McCallum; Martin Stabe
Inspired by the Graphic Continuum by Jon Schwabish and Severino Ribecca

ft.com/vocabulary

Stretch goal–advanced analytical techniques

Correlation



Measures the **relationship** between two numeric variables.

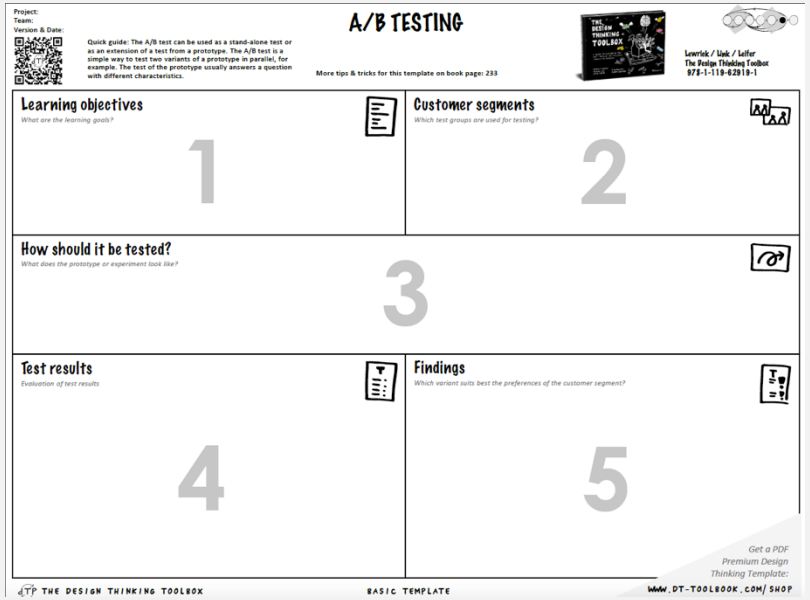
Regression

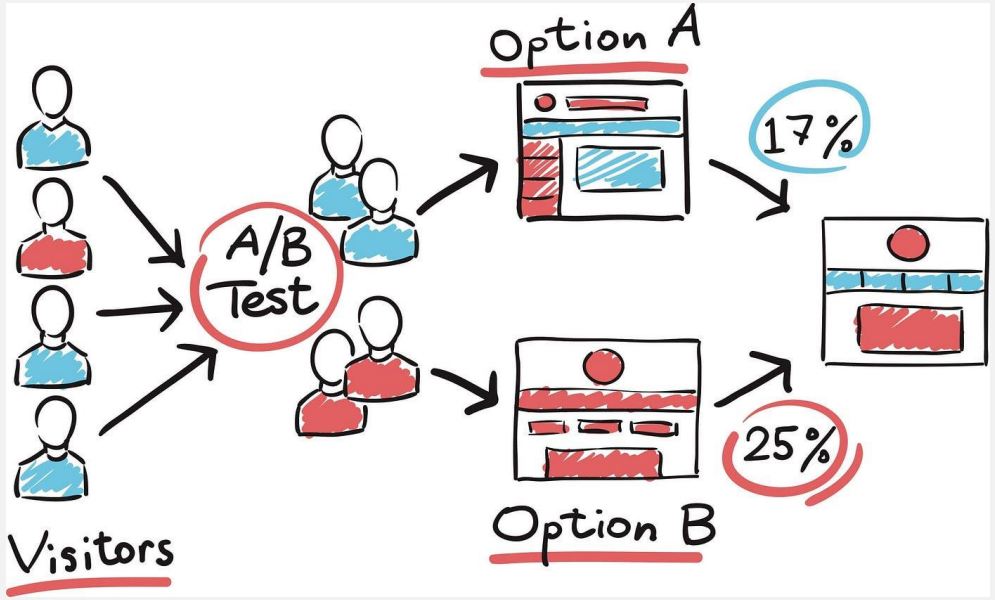
Measures how two numeric variables **affect** each other.

	Correlation analysis	Regression analysis
Purpose:	Measure the strength of the relationship between two variables.	Predict outcomes or determine the impact of certain variables.
Method:	Use correlation coefficients (eg, Pearson's r) to identify how closely variables are linked.	Run a regression model to explore how different factors influence your dependent variable (eg, customer satisfaction).

A/B testing

Define your hypothesis	Identify metrics for success	Create the variations	Run the test	Analyse the results
• Clearly state what you want to test and why. For example: “Will changing the call-to-action text on the landing page increase conversions?” • Ensure that the hypothesis aligns with your business or product goals.	• Choose measurable KPIs to track during the test (eg, conversion rate, click-through rate, or engagement time). • Metrics must reflect the impact you expect from the change.	• **A (Control):** The original version. • **B (Variation):** A version with one key change. • Keep the change minimal and targeted (eg, headline change, button colour, or layout tweak).	• Split your target audience randomly into two groups (one group sees A, the other sees B). • Ensure you have enough participants for statistically significant results.	• Compare the performance of both versions based on the chosen metrics. • Look for statistically significant differences between A and B.





Pilot programs

A pilot program is a small-scale, preliminary study conducted before a full-scale research project or implementation. It tests the feasibility, processes, and potential outcomes of the main research.

Key benefits

Test feasibility	Refine research method	Early insights	Risk mitigation	Quick iterations and learning
Pilots allow you to discover any logistical, methodological, or participant-related challenges before scaling up.	Assess whether your data collection techniques (eg, interview questions, observation methods) work in practice.	Even small samples can provide initial qualitative data that guide the direction of future research. 	By testing on a smaller scale, you reduce the risk of investing heavily in a flawed approach.	A pilot fits perfectly with the lean research principle of rapid experimentation, where you can iterate based on real feedback before committing to larger-scale research.

Claims, evidence and reasoning.

A claim is a statement or assertion that presents an argument or position.

Evidence includes the data, facts, statistics, examples, quotes, and other information that support the claim.

Reasoning explains how the evidence supports the claim. It connects the dots for the reader and illustrates the logic behind the argument.

Value creation | putting it all together

Go, no go / responding to research insights / alignment with customer demand / feasibility, desirability and viability / iterate or pivot?

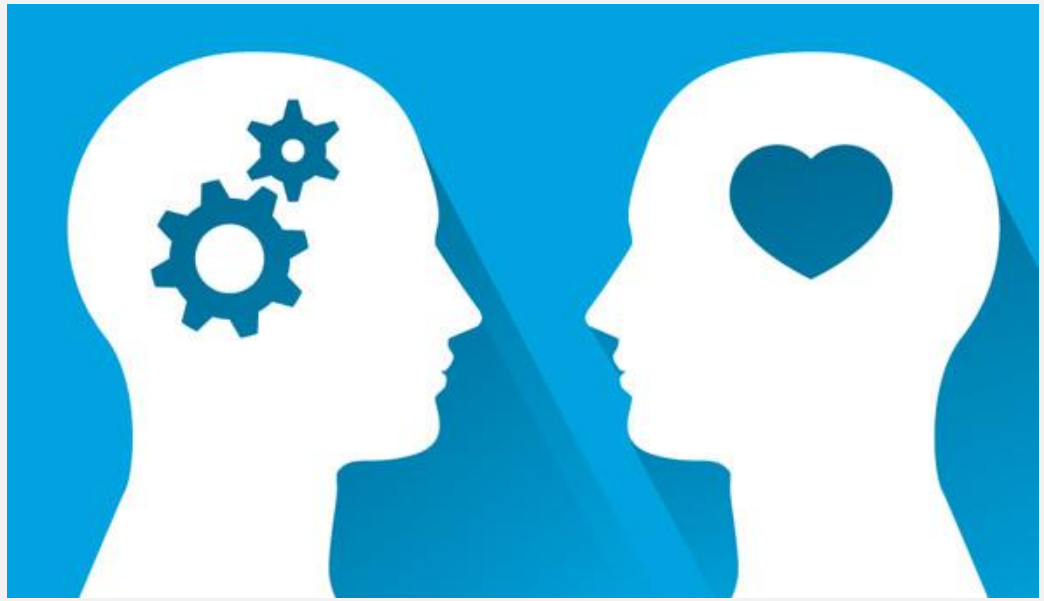
Go, no go–using research to inform business decisions

Dimension	Explanation	Exemplar / key criteria
Define:	A decision point where a project/initiative either moves forward or stops based on research insights.	Deciding whether to launch a new product feature after testing with customers.
Research role:	Research validates assumptions, mitigates risk, and optimises resources.	Lean research methods such as interviews, A/B testing, and pilots provide real-world evidence.
Alignment with Hoshin Plan:	Ensures research supports long-term strategic goals outlined in the Hoshin Plan.	The initiative must align with the company's strategic objectives (eg, customer satisfaction improvement).
Key decision criteria:	Alignment with goals - Evidence-based confidence - Risk vs. reward.	Does the research support moving forward? Is the risk acceptable compared to potential rewards?
Benefits:	Agility, strategic focus, and increased success rate for initiatives.	Projects filtered through a research-driven "go or no go" process have a higher chance of success.
Example:	Pilot research reveals a feature isn't improving user experience, leading to a "no go" decision.	Reallocate resources to a different feature based on research feedback.

Responding to research insights. Or, *the emotional rollercoaster*.

Good news	Bad news
• **Emotional response**: excitement, relief, validation of vision. • **Impact on decision-making**: confidence to scale or move forward. • **Potential pitfall**: overconfidence can lead to prematurely scaling or missing subtle issues in the data.	• **Emotional response**: disappointment, frustration, anxiety. • **Impact on decision-making**: reconsideration of strategy, need for a pivot. • **Potential pitfall**: reacting emotionally without a clear plan or losing focus due to doubt.

Balancing emotion and logic in response.



Stay objective	Take a step back
• Use research insights as a grounding tool, regardless of emotional response. • Recognise that bad news can prevent costly mistakes, while good news isn't an automatic green light for unchecked expansion.	• Take time to process emotionally charged insights before making key decisions. • Seek advice from co-founders, mentors, or trusted team members to gain perspective.

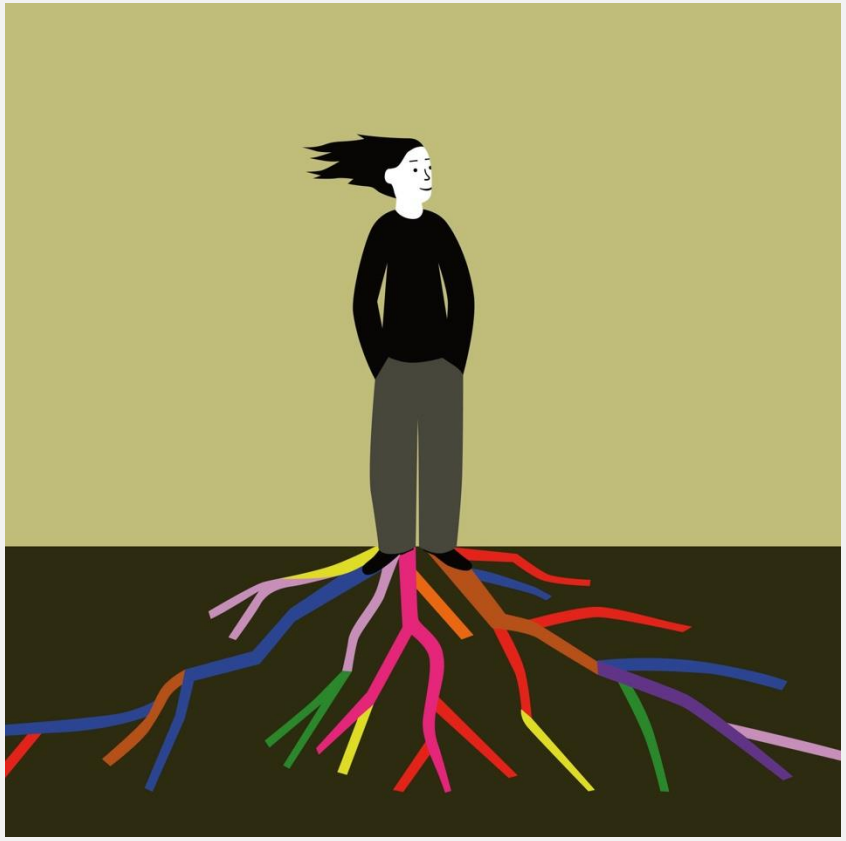
Handling good news.

Celebrate, but stay cautious	Use momentum for motivation
• Celebrate research insights that support growth or new opportunities, but always validate through further testing. • **Example:** a customer interview reveals excitement about a new product feature; before scaling, consider running additional validation.	• Good news can fuel momentum—use it to push the team forward while keeping research-backed goals in mind.

Handling bad news.

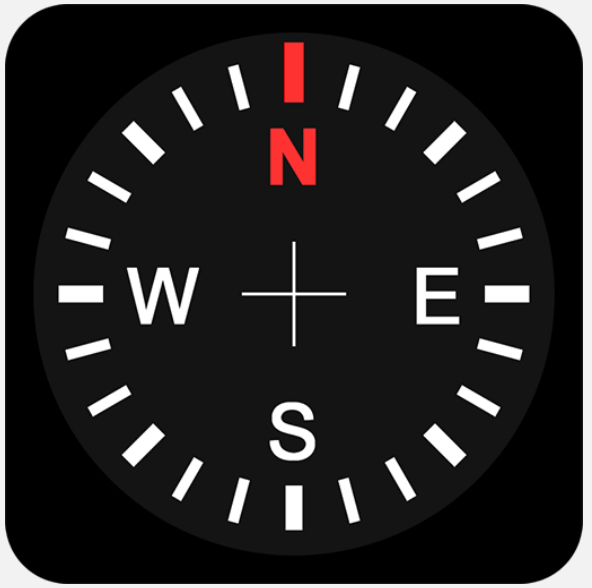
Pivot, don't panic	Embrace the learning opportunity
• If insights suggest a feature or strategy isn't working, pivot rather than scrapping the idea entirely. • **Example:** a pilot program fails to meet expectations; instead of abandoning the idea, adapt based on feedback and iterate.	• Use bad news as a chance to learn. Often, insights that contradict your expectations help refine your product or strategy. • Stay resilient—founders face numerous setbacks, but those who adapt based on solid insights tend to succeed.

The importance of founder resilience.



Emotional resilience	Strategic resilience
• Founders must navigate both high and low moments; it's not just about reacting to the research, but leading through it. • Emotional intelligence helps balance excitement and frustration, allowing better, more thoughtful decision-making.	Build a culture that values data-driven insights, even when they bring bad news, ensuring your business can adapt without losing momentum.

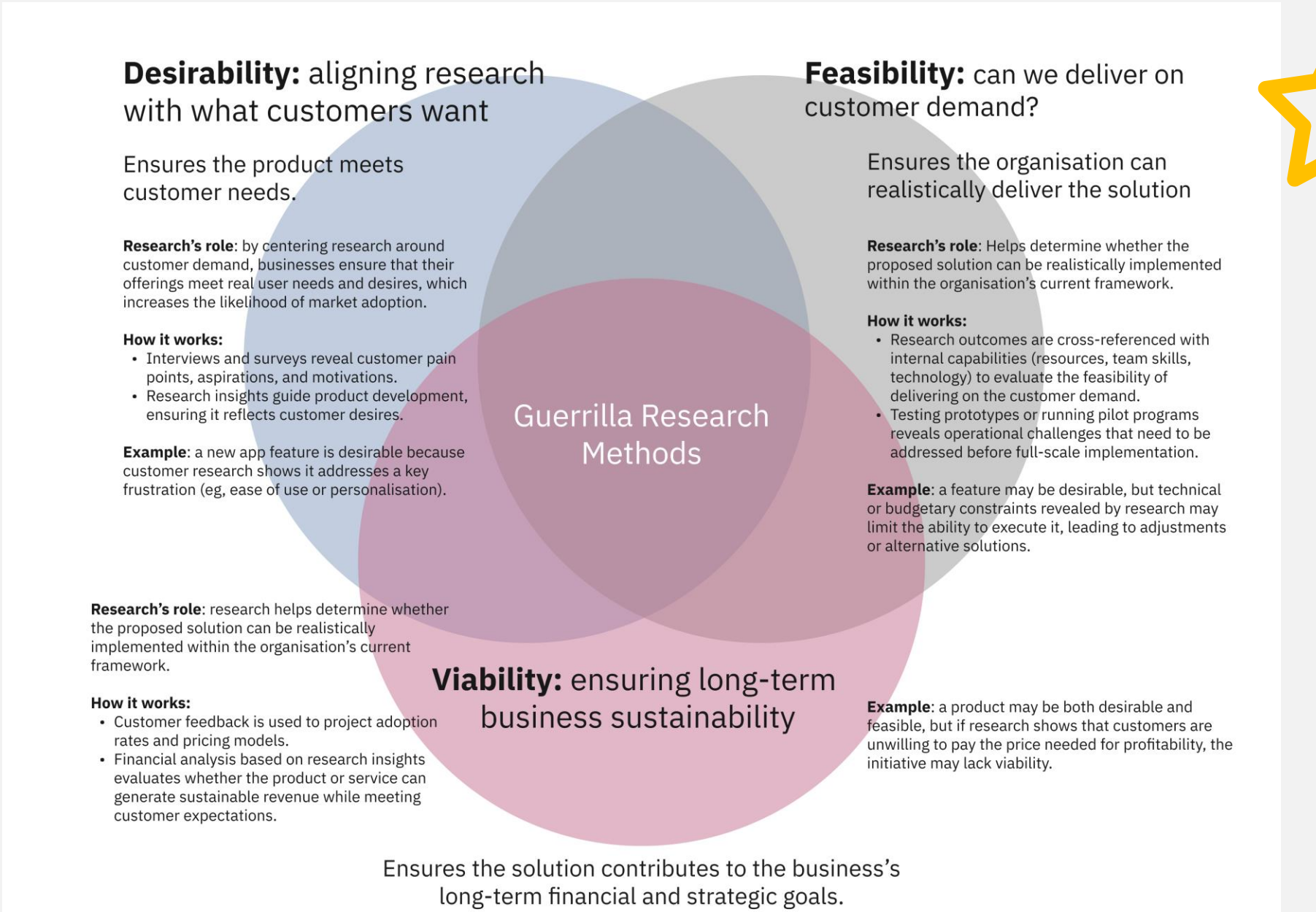
Alignment with customer demand



Effective research not only seeks to understand the customer but ensures that every insight is directed toward fulfilling their needs, creating a mutually beneficial relationship between the business and its customers.

Customer demand is a strategic compass	Data-driven insights	Continuous adaptation	Risk mitigation	Customer loyalty and satisfaction
Research ensures business decisions are aligned with customer needs, leading to better product-market fit.	Research, when aligned with customer demand, provides actionable insights that improve product development and marketing strategies.	Regular research helps businesses stay ahead of shifting customer preferences, allowing for constant iteration and improvement.	Aligning research with customer demand reduces the likelihood of developing products or services that fail to meet market expectations.	Responding directly to customer needs builds loyalty and fosters long-term customer relationships.

Desirability, feasibility, and viability



Understanding the difference.

Iteration	Pivot
Making incremental improvements to refine the current product, service, or strategy based on customer feedback.	A fundamental change in the business model, product, or target market based on evidence that the current strategy won't succeed.
When to iterate: The core value proposition is strong, but small adjustments are needed to improve performance or user experience.	**When to pivot**: The product is not meeting customer needs, or the market opportunity is not as strong as initially believed.

Key factors to consider from research insights

	Customer feedback	Market signals	Competitive landscape	Financial metrics
Iterate:	If feedback highlights minor issues (eg, usability problems, feature tweaks), this suggests that the core product or service is solid but needs fine-tuning.	Positive market signals, such as interest from potential customers, good engagement metrics, and growing demand, suggest you should keep building on what's working.	If competitors are performing well with a similar product, iteration may allow you to differentiate and improve your offering.	If revenue is growing but profitability is lagging due to inefficiencies, iteration to improve cost structures or customer acquisition strategies may be the best route.
Pivot:	If feedback consistently shows that customers don't find value in the core offering, or you've misjudged the market need, it may be time to consider a pivot.	Poor market fit or shrinking demand could indicate that the current strategy isn't sustainable, signalling the need for a more fundamental change.	If competitors have already captured the majority of the market or if the landscape has shifted dramatically, a pivot might be needed to explore new opportunities.	If financial performance is consistently underperforming and unsustainable despite several iterations, it might be time to reconsider the core business model.

Iterate or pivot?

When to iterate.

Strong core product/market fit	Small changes with big impact	Early positive signals
If customers find value in your product, but feedback points to specific areas for improvement.	Minor tweaks to the product (eg, adding a feature, improving UI) can significantly enhance the user experience or drive growth.	If early adopters show enthusiasm but request refinements, iteration allows you to optimize and expand.

When to pivot.

Consistent negative feedback	Poor market fit	Draining resources with minimal results
If your target audience consistently expresses dissatisfaction or disengagement, and iterations haven't made a significant difference, a pivot may be necessary.	When research shows that the market demand for your product isn't as strong as anticipated, or if the market dynamics have changed dramatically (eg, new regulations or technologies).	If resources are being invested heavily without measurable success (eg, customer acquisition costs remain too high), a pivot may be the best option to salvage the business.

Iterate or pivot?

Framework for making the decision.

Evaluate research data	Test and experiment	Involve key stakeholders
Focus on the evidence from customer feedback, market trends, and financial data. Does the data suggest improvement potential or a fundamental misalignment?	Before making a drastic decision, run small tests or pilots to validate whether iteration will solve the issues or if a pivot is necessary.	Discuss findings with co-founders, advisors, and key team members to gain diverse perspectives on the best course of action.

Breakout groups

Group 1 GreenCycle	Group 2 HealthSync	Group 3 LifeHaven	Group 4 TalentFlow

Break

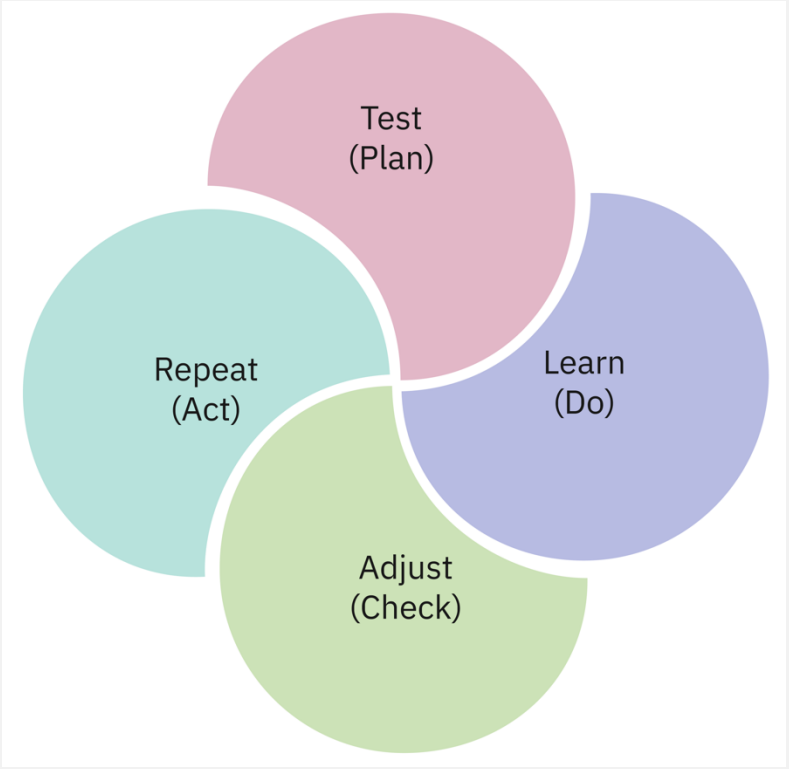
Leadership and negotiation| experiential workshop

Iteration and continuous learning / the importance of feedback loops / adapting to investor expectations / further reading / key take away.

Agenda

Insight development	1. Design thinking research principles ✓
	2. B2B startup user-centered research ✓
Experience and imagination	3. Empathy and customer discovery ✓
	4. Design thinking toolbox ✓
Prototyping and modelling	5. Research questions ✓
	6. Research insights ✓
Value creation	7. Research analysis ✓
	8. Putting it all together ✓
Leadership and negotiation	9. Workshop ✓
	10. Reflection

Learning is an ongoing process.



- Be curious.
- Low-cost, fast iterations lead to actionable insights.
- Reflect on how you applied research iteratively—what were your key takeaways?
- What did you learn from making quick adjustments based on insights?

The importance of feedback loops

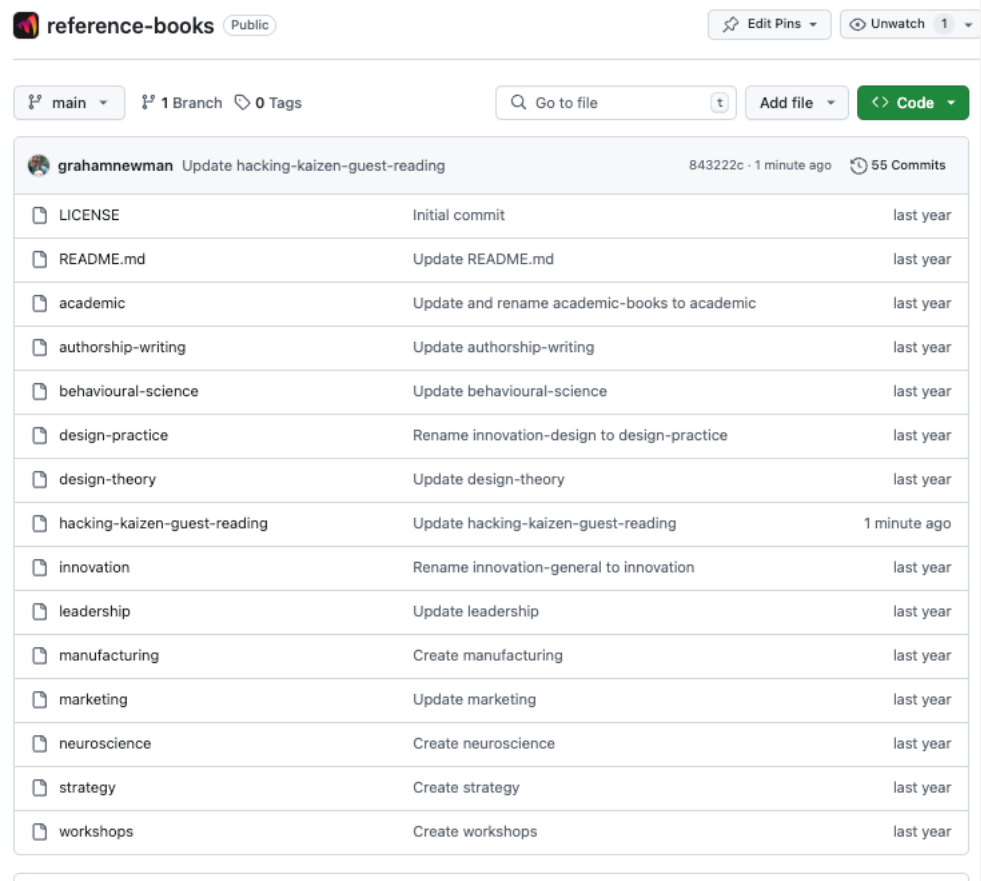
- Feedback from users and stakeholders is crucial to evolving strategy.
- Reflect on the feedback you received. How did it affect your decisions.
- Were there any ‘aha!’ moments that feedback triggered?
- How can you improve your approach based on feedback received?

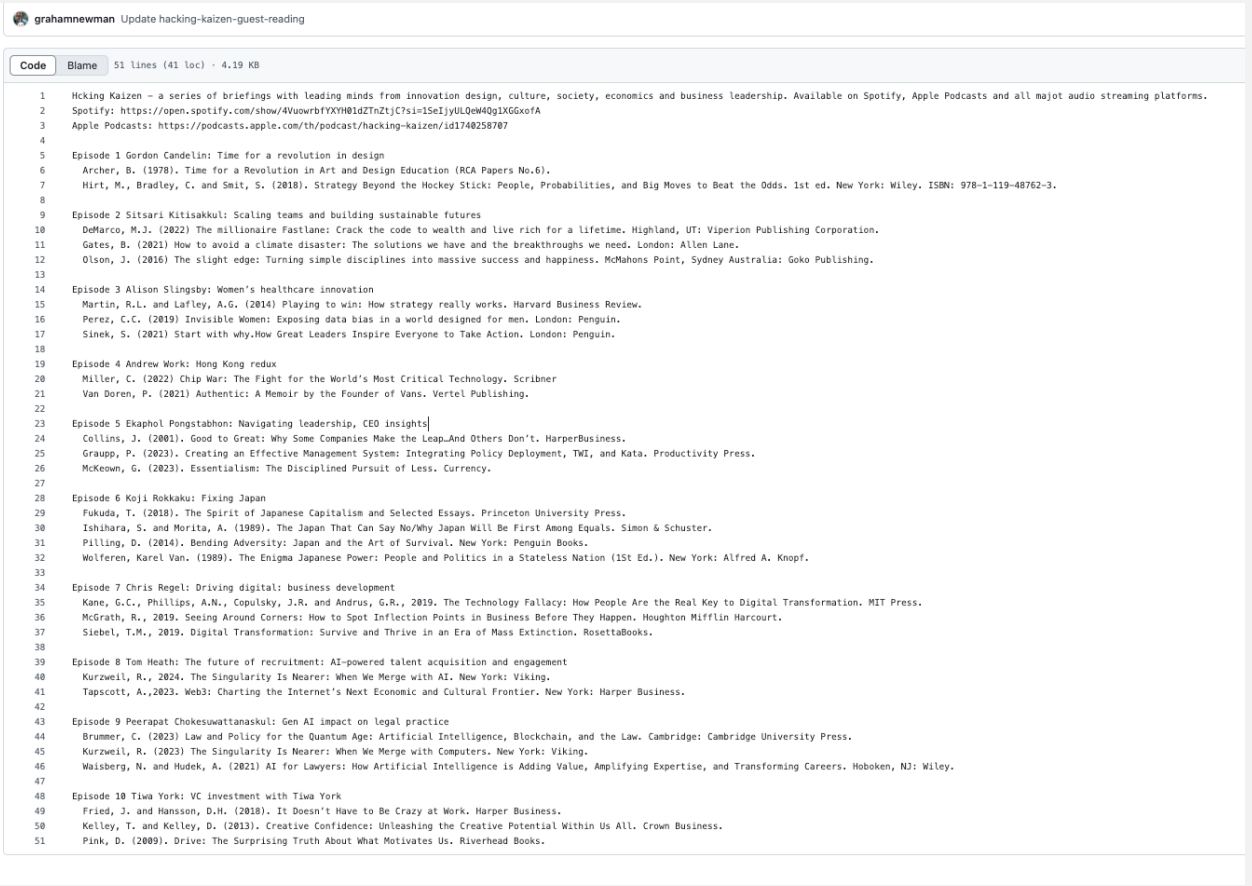
Adapting to investor expectations

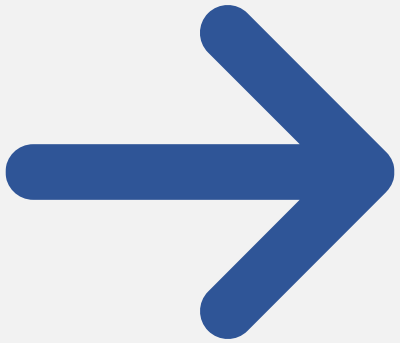
- How did market signals and investor feedback influence your research direction?
- What adaptations were necessary to align with stakeholder or investor demands?
- Reflect on how you navigated conflicting feedback.
- Consider: What would you do differently to better anticipate investor concerns?

Further reading

Further reading







Checklist

1. Define clear business goals
2. Establish research objectives
3. Identify key stakeholders
4. Select the appropriate research methods
5. Recruit the right participants
6. Design the research process
7. Conduct a pilot study
8. Collect the data
9. Analyse the data
10. Align research insights to the business goals
11. Provide actionable recommendations
12. Monitor and iterate

Key take away

Benchmark of research is to be prudent man.

1. What is the concern and context of the question we are trying to answer?

2. What are the claims, evidence and reasoning to substantiate the findings?

3. Don’t let analysis paralysis destroy risk taking and intuition.

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