

Biography



Workshop| Guerilla research methods

Introduction

Agenda

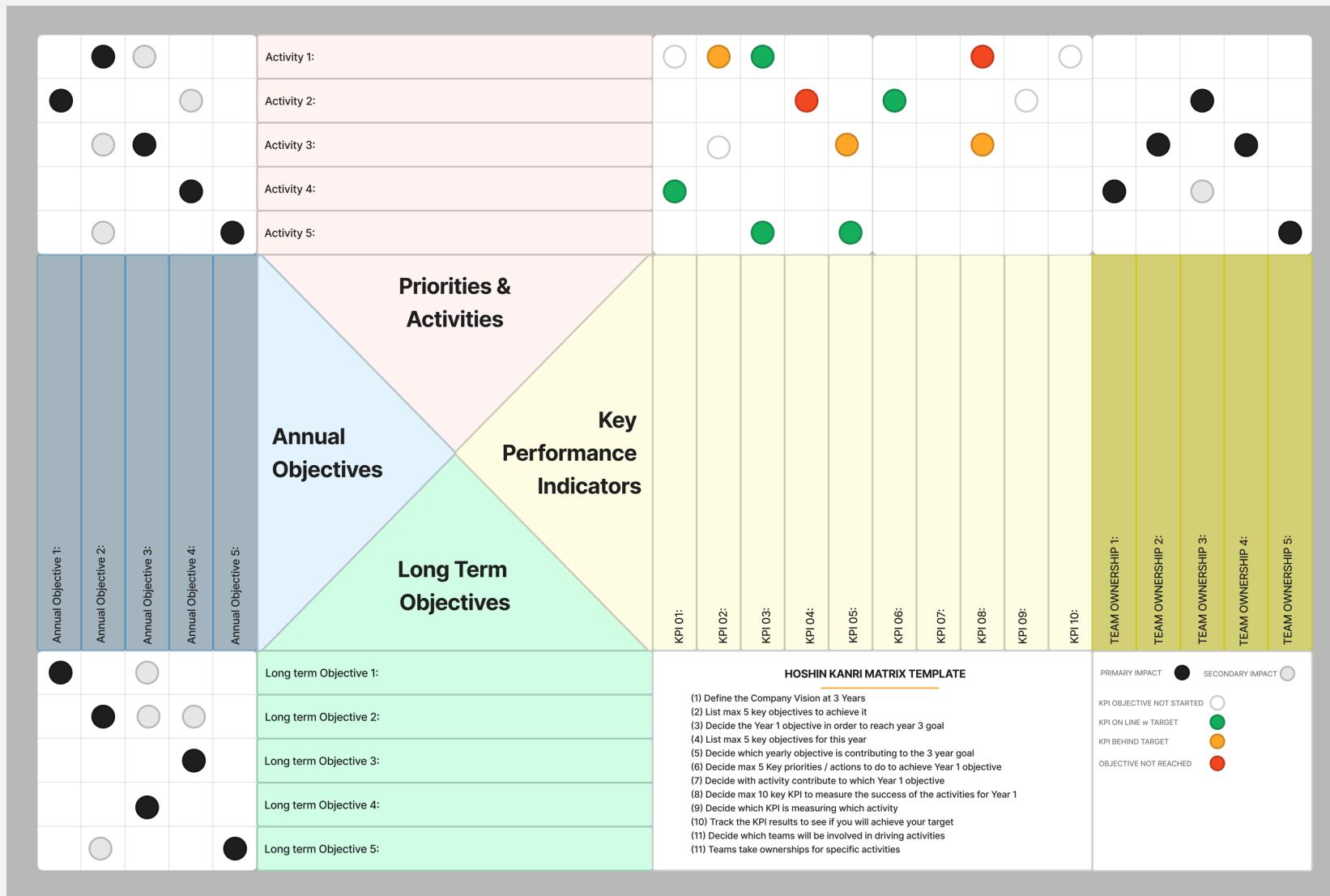
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|----------------------------|--|
| Insight development | 1. Design thinking research principles |
| | 2. B2B startup user-centered research |
| Experience and imagination | 3. Empathy and customer discovery |
| | 4. Design thinking toolbox |
| Prototyping 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 outcomes

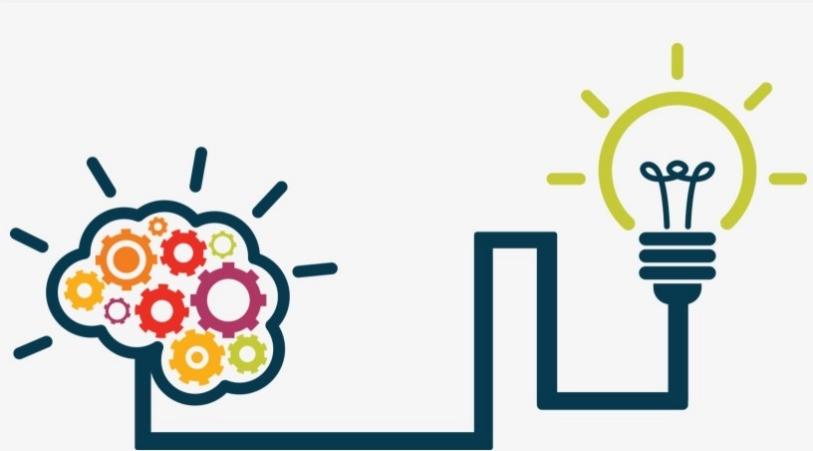


By the end of this workshop
you will be able to:

- 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.



Problem statement

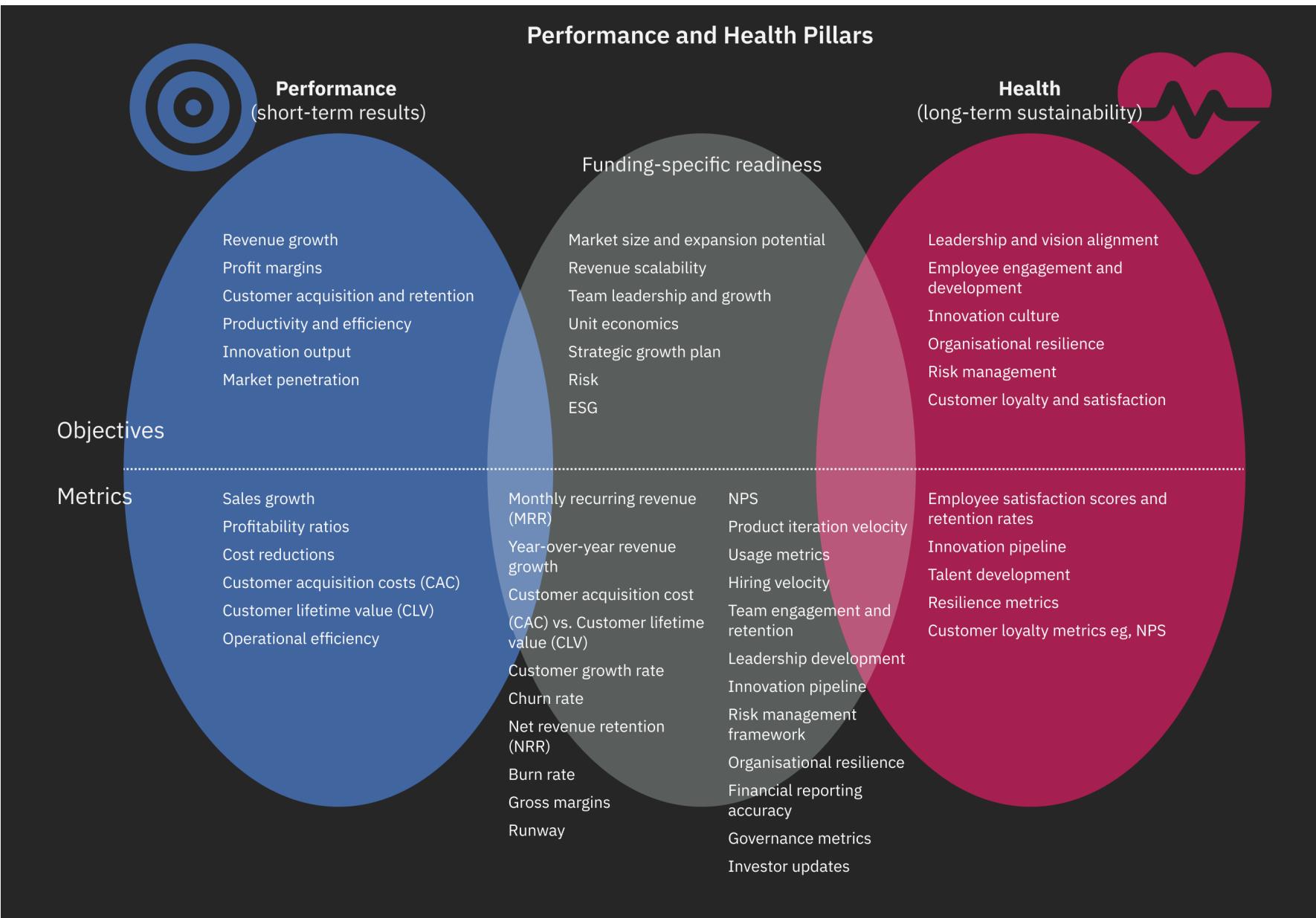


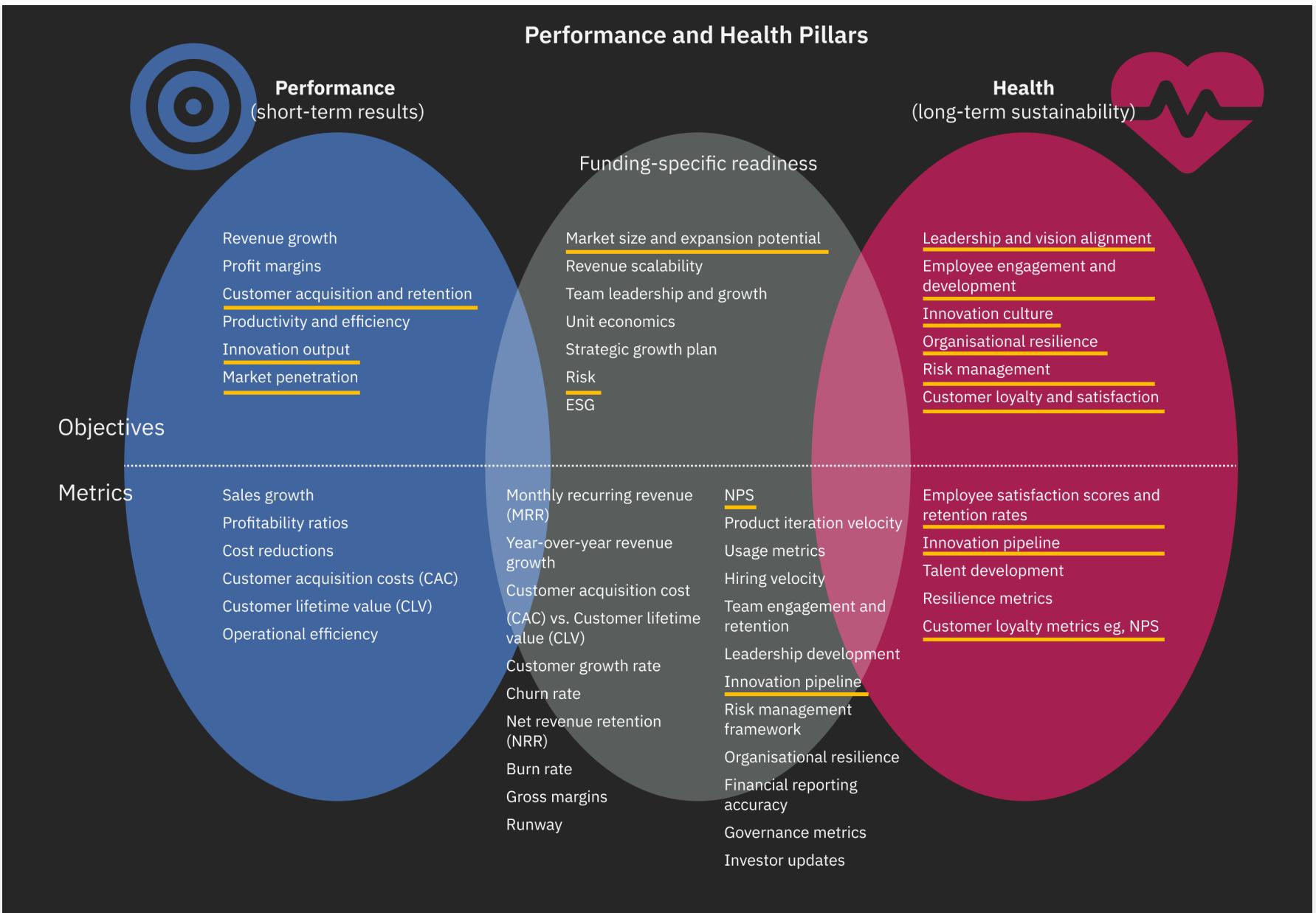
How might we integrate guerrilla research methods into strategic planning

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

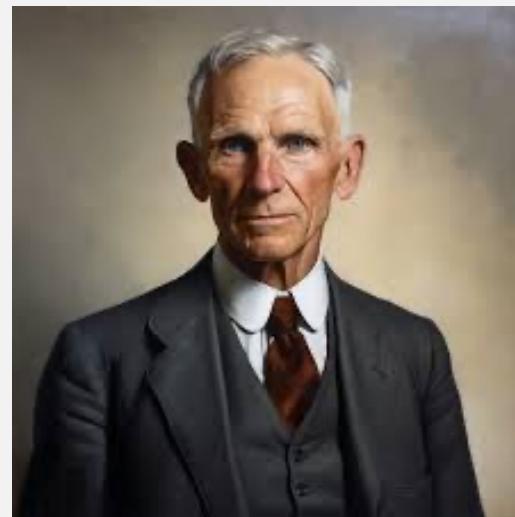
So that Hoshin Kanri is more agile, informed, and responsive to dynamic market conditions.

Performance and Health Pillars





“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.”

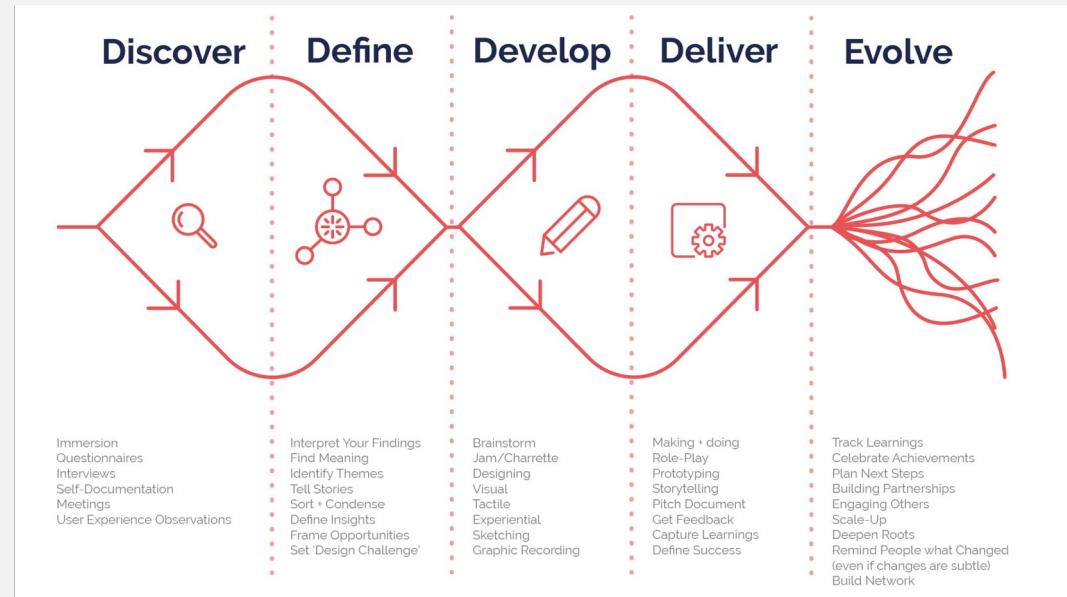
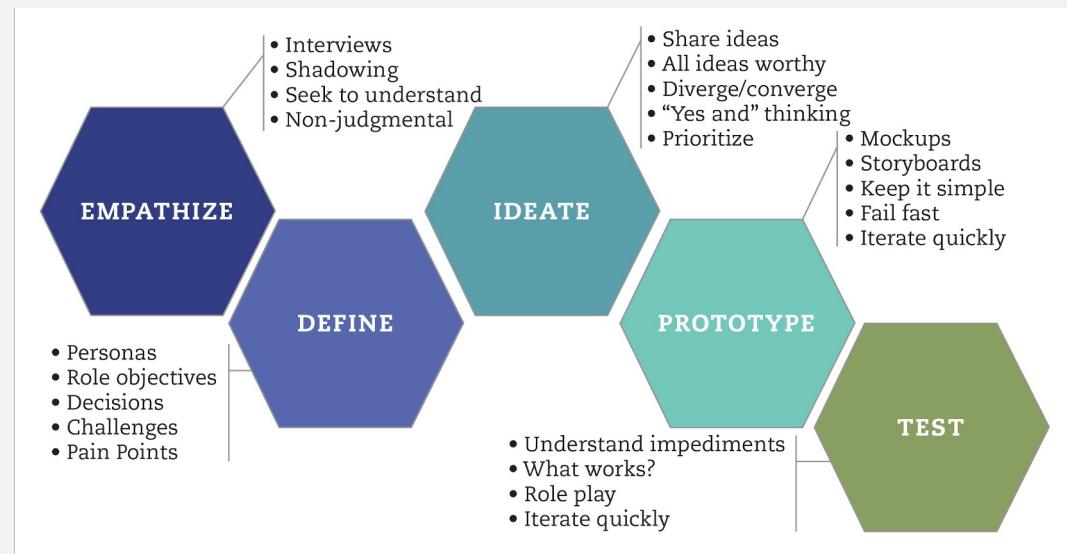


Insight development | design thinking research principles

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.

What is design thinking in a research context?

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

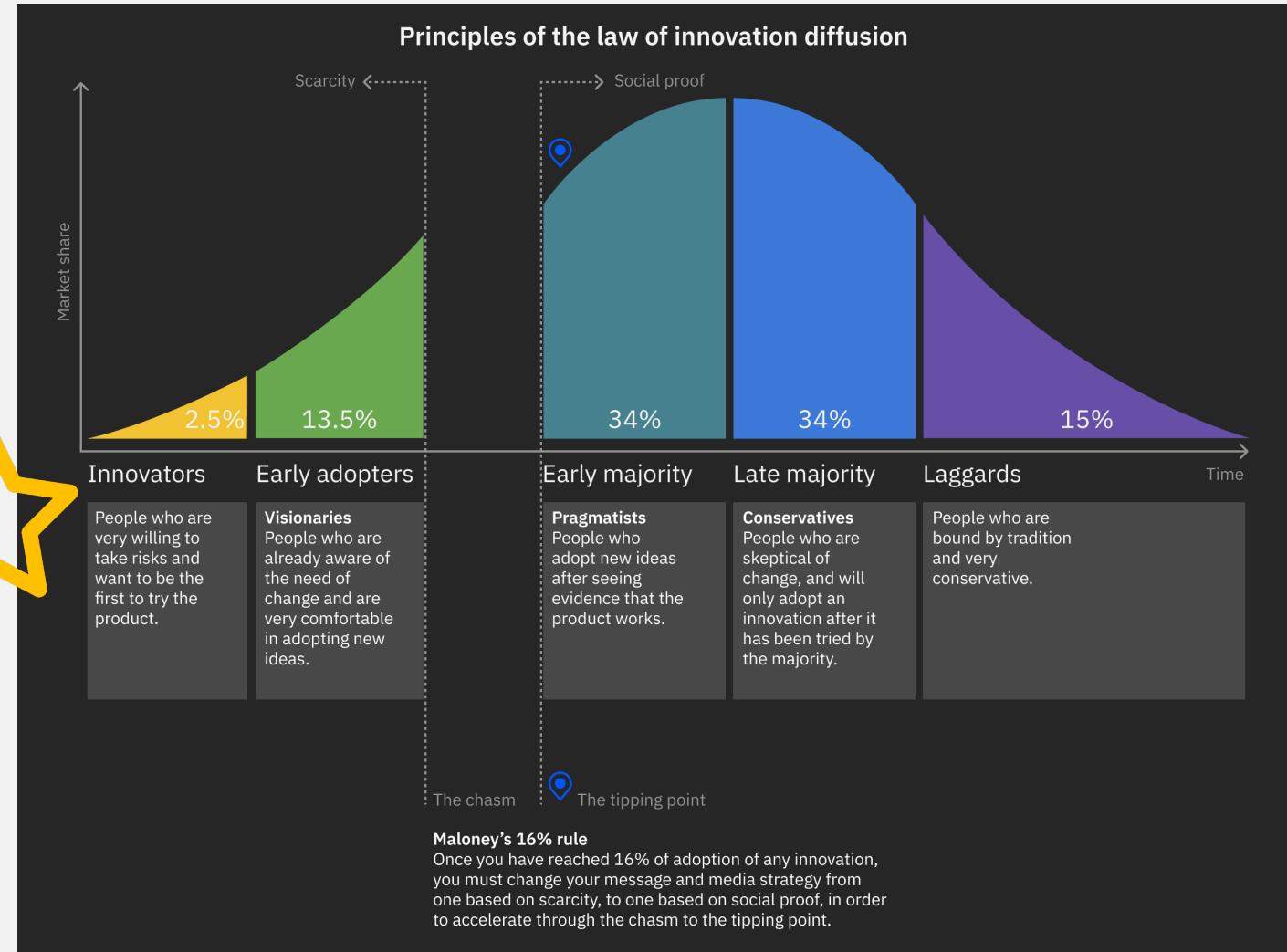
Design thinking may clash with traditional organizational cultures or those that prioritize hierarchy, efficiency, or predictability over exploration and creativity.

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.

Importance of user-centered research in B2B startup

Who are your extreme users?



Importance of user-centered research in B2B startup

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
							
<p>Relationships are often long-term and built on trust.</p> <p>User-centered research helps understand the specific pain points, processes, and goals of business customers</p> <p>Crucial for customer retention and recurring revenue.</p>	<p>B2B customers have complex, multi-layered challenges that require tailored solutions.</p> <p>User-centered research can gain insights into these challenges by engaging directly with decision-makers and end-users.</p>	<p>Key milestone.</p> <p>Understanding how your product integrates into the workflow of other businesses.</p> <p>User-centered research uncovers how well a product addresses customers' operational needs, helping refine their offerings to meet actual demand.</p>	<p>Avoid building unnecessary features or services.</p> <p>User-centered research can prioritize features that are most valuable to their business customers.</p>	<p>User-centered research helps startups understand the decision-making process within their target businesses</p> <p>Position the solutions in a way that resonates with the key stakeholders.</p>	<p>Stand out from competitors by providing tailored solutions that are deeply informed by the needs of their customers.</p> <p>Key differentiator in markets where products and services might otherwise seem similar on the surface.</p>	<p>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.</p> <p>This agility helps the startup respond to changes in customer needs or market conditions more effectively.</p>	<p>User-centered research informs strategic decisions such as pricing models, go-to-market strategies, and partnership opportunities.</p> <p>By understanding customers' value perceptions and decision-making criteria.</p>

Aligning research methods with business goals

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
 <p>Start with clarity—whether it's growing market share, improving customer retention, launching a new product, or entering a new market.</p> <p>Align the research focus to the goals: For example, understanding customer satisfaction, pain points, and reasons for churn.</p>	 <p>Qualitative vs. quantitative vs mixed methods.</p> <p>Exploratory vs. confirmatory. Eg, identifying new opportunities, or confirming a specific hypotheses.</p>	 <p>For instance, if a business goal is increasing conversion rates, usability testing can focus on identifying friction points in the customer journey.</p> <p>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).</p>	 <p>Engaging stakeholders ensures that research questions address the practical needs of each team, making the insights more actionable.</p> <p>Co-create research objectives: involving stakeholders in defining research objectives ensures that the research aligns with broader business priorities. This also increases buy-in.</p>	 <p>Agile methods like rapid prototyping, quick feedback loops, and guerrilla research help keep research responsive to evolving business goals.</p> <p>Actionable insights: research outputs should provide clear, actionable insights that teams can implement quickly.</p>	 <p>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.</p> <p>Always consider the potential return on investment (ROI) from research. Align the scope and scale of the research to the business outcome it supports.</p>	 <p>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.</p> <p>Communicate effectively: present research insights in a way that's easy to understand. Use data visualizations, user stories, or case studies.</p>	 <p>After implementing research-driven changes, measure how they align with the original business goals.</p> <p>Iterate as needed: Business goals often evolve, and so should the research.</p> <p>Continuously monitor both the performance of business initiatives and the relevance of research questions.</p>

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.

INTERVIEW FOR EMPATHY

Project: Team: Version & Date: More tips & tricks for this template on book page: 57

Quick Guide: The Interview for Empathy is intended to provide a good understanding of the user's needs, emotions and motivation. The goal is to look at the world from the user's perspective and learn more about the user's needs and motivations.

More info on the interview theme and the key questions

1 Question map

Make a note of the central theme and the key questions

How? ← subject → What?

What? ← Who? → Who?

2 Description of the person interviewed

Make a note of your interviewee's name and add a phone or email if possible.

Name: _____

Age: _____

Personal data: _____

Place/date of the interview: _____

3 Describe the journey stages. Sketch the timeline.

Enter the frequency of the actions:

- All the time
- Often
- Seldom

Gains (1)

Pains (2)

Write down notes about the user's emotions during the test.

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THE DESIGN THINKING TOOLBOX BASIC TEMPLATE www.dt-toolbox.com/shop

CUSTOMER JOURNEY

Project: Team: Version & Date: More tips & tricks for this template on book page: 103

Quick Guide: The Customer Journey aims to understand in detail what users/customers experience when interacting with companies, products or services. This helps to identify potential friction areas within the team in order to realize a unique experience.

1 Persona

Choose the persona and describe it briefly.

2 Scenario

Describe the scenario

3 Goals and expectations

What are the goals and expectations?

4 Typical Journey

Describe the customer journey.

5 Action

Define the individual actions.

6 Thinking

Define the individual thoughts, keys or words about it.

7 Emotions

Emotions and emotion curve.

8 Opportunities

Opportunities and opportunities possibilities.

Area of responsibility

Identify who is responsible for action and processes.

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STRUCTURED USABILITY TESTING

Project: Team: Version & Date: More tips & tricks for this template on book page: 229

Brief Instructions: Usability testing can be used to check how well a product or service works for the user and how satisfyingly for the user. The aim is to check and compare the user's behaviour with the assumptions, validate and compare them with the user/customer.

1 Phase: Planning

Planning and preparation of the test

Concept: What is the point?

Location: Where is it tested?

Roles: What are the roles in the test?

Test persons: Who are the test subjects?

Documentation & measuring devices: How is the test documented?

Pilot test: Where and how is the pilot test carried out?

2 Phase: Test phase

Procedure of the actual test execution

Welcome

Declaration of consent

Conducting the test

Interview questionnaire

Good-bye/conclusion

3 Phase: Completion

Completion, evaluation and documentation of the test

Evaluation of documents & data: What are the actual results?

Documentation: How is the test documented?

Workshops/presentation of the findings: How are the results presented?

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Insight development | B2B startup user-centered research

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

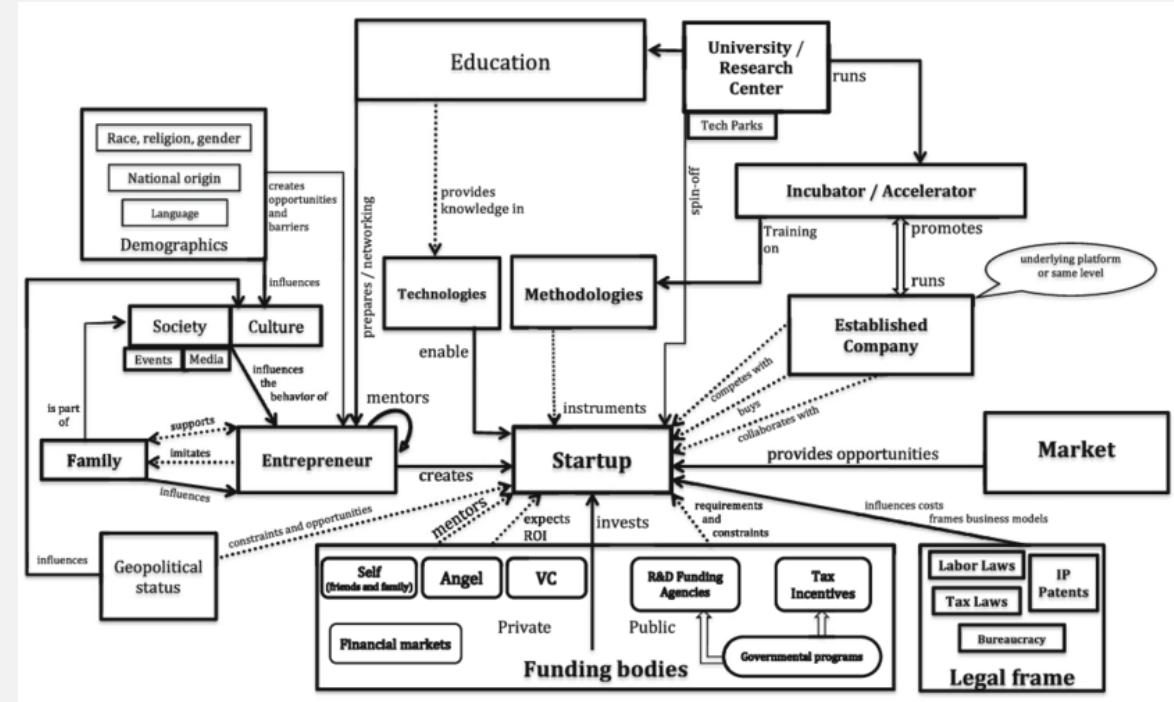
Differences between B2B and B2C research



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 guerilla 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

A screenshot of the Nektar website homepage. At the top, there's a yellow header bar with the text "Meet Nektar team at OysStars'24 Book time now! →". Below it is a navigation bar with links for "Platform", "Solutions", "Customers", "Resources", "Company", "Pricing", and "Why Nektar?". A "See a demo" button is also present. The main content area has a yellow background with the Nektar logo and the text "Lay the data foundation for exceptional GTM execution". It describes Nektar as a comprehensive data capture solution. Below this, there are three circular icons: "100% adoption", "No change management", and "Go-live in <2 weeks". At the bottom, there's a section titled "Trusted by high performing global revenue teams at" followed by logos for "crunchbase", "moengage", "OBSERVE.AI", "GUIDE CX", and "Signifyd".

Meet Nektar team at OysStars'24 Book time now! →

Nektar Platform Solutions Customers Resources Company Pricing Why Nektar? See a demo

Lay the data foundation for exceptional GTM execution

Nektar is the most comprehensive and flexible data capture solution that offers complete control over customer data sync – contacts, opportunity contact roles, GTM activities, activity insights and more – to match your sales process and security needs.

100% adoption No change management Go-live in <2 weeks

See a demo Why Nektar? →

Trusted by high performing global revenue teams at

crunchbase moengage OBSERVE.AI GUIDE CX Signifyd

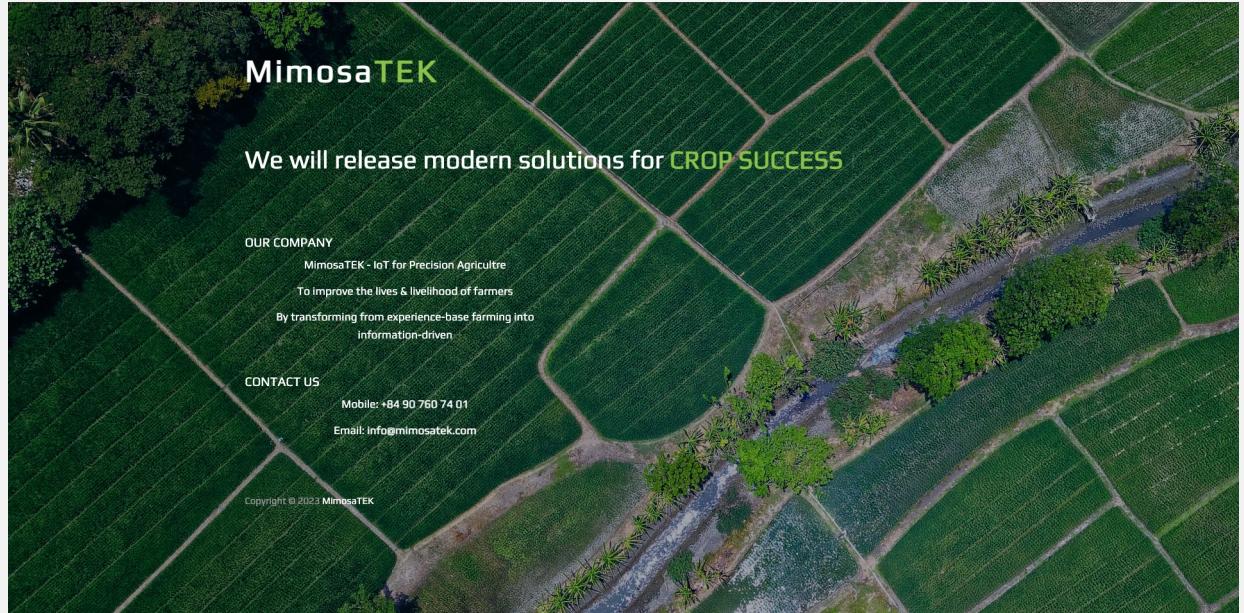
Source: Insignia Business Review, Insignia Ventures Partners (2022)

Case studies of successful B2B startups using guerilla 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 guerilla 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

The screenshot shows the homepage of the privé: technologies website. At the top, there is a logo for 'privé: technologies' next to a red square containing a white Hong Kong flag emblem. The navigation bar includes links for 'Home', 'Products', 'About', 'Insights', 'Log In', and a prominent blue 'Request Demo' button. The main headline reads 'Supercharge Your Wealth Management'. Below it, a sub-headline states: 'Our innovative SaaS platform equips financial institutions with the complete package to supercharge your wealth and investment business.' Another sub-headline says: 'We offer all the technology and investment solutions that helps convert cash into investments to maximize your AuM.' A large green button labeled 'Boost My AuM' is centered. To the left, there is a chart titled 'Asset Class Allocation' showing percentages for Fixed Income, Equity, Alternatives, and Cash and Equivalents. In the center, a large line graph titled 'Portfolio Performance' tracks the growth of a portfolio from 2012 to 2023, with a callout for a 'Proposed Portfolio' at 28.10% on 30 Nov 2020. To the right, there is a circular 'Portfolio Region Breakdown' chart showing 46% for Asia Developed, 24.4% for Europe Developed, 19.1% for North America, 7.2% for Japan, and 3.1% for Others. The total AuM value is listed as \$5,320,031.89.

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

Case studies of successful B2B startups using guerilla 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.



The screenshot displays the homepage of the Lapasar website. At the top, there is a navigation bar with links for "+603 5524 1654", "WELCOME@LAPASAR.COM", "OPERATION HOURS: 09:00AM - 6:00PM", "HOME", and "ABOUT US". The main content area features two main service offerings:

- LAPASAR WHOLESALE**: This section shows a shopping cart overflowing with various boxes and packages. A "Visit Now" button is located below the image.
- CORPORATE MARKETPLACE**: This section shows a person's hands typing on a laptop keyboard. A "Go to Marketplace" button is located below the image.

Below each service section, there is a brief description and a small image related to the service.

Source: mystartupaccelerator.org/case-studies

Experience and imagination | empathy and customer discovery

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

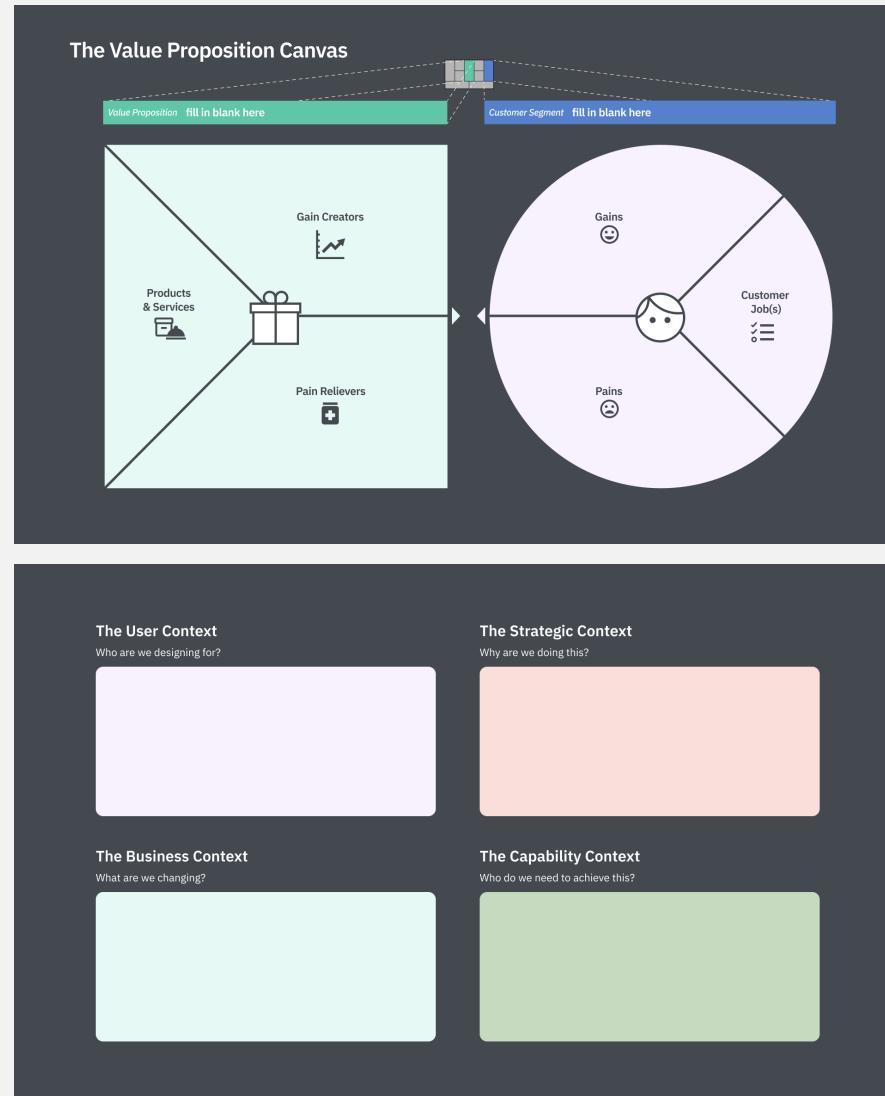
Empathy

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.

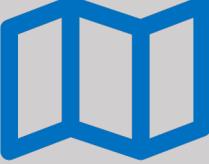


What is customer discovery?

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.

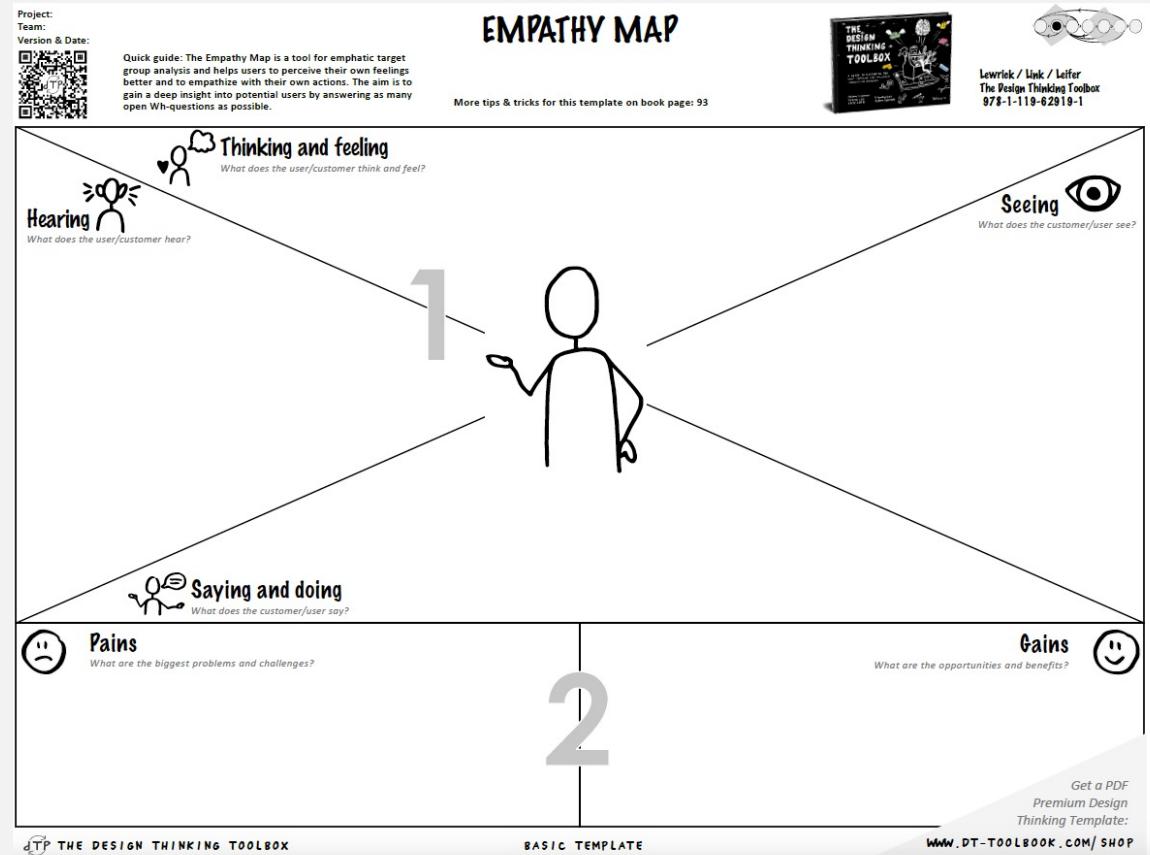


Identifying key stakeholders in B2B

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

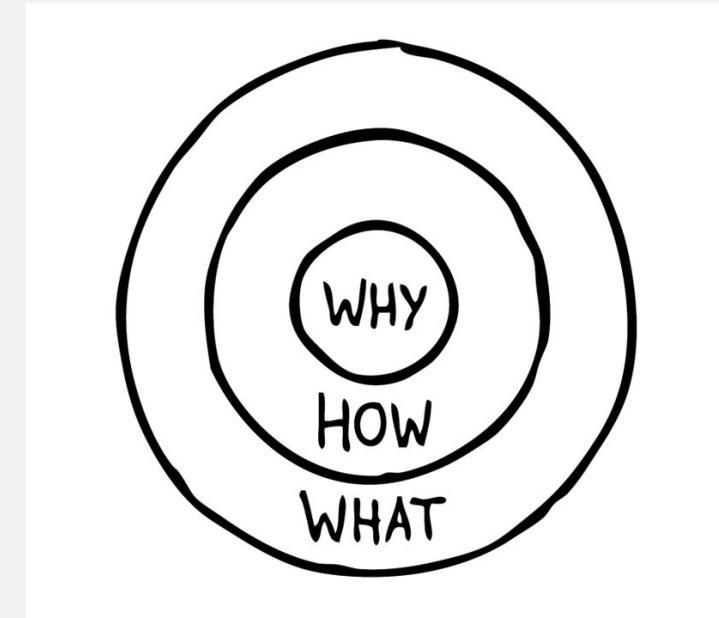
“Like” and “nice” are a red flag.



“Why?”

“Why?”

“Why?”



Conducting effective customer interviews

Emotional response cards

A qualitative tool for empathetic target group analysis.

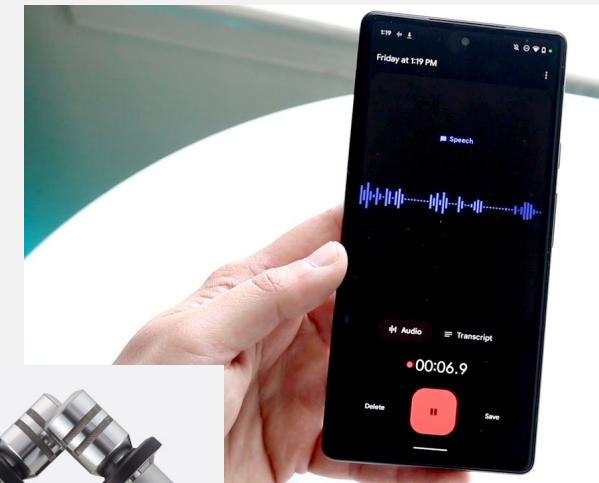
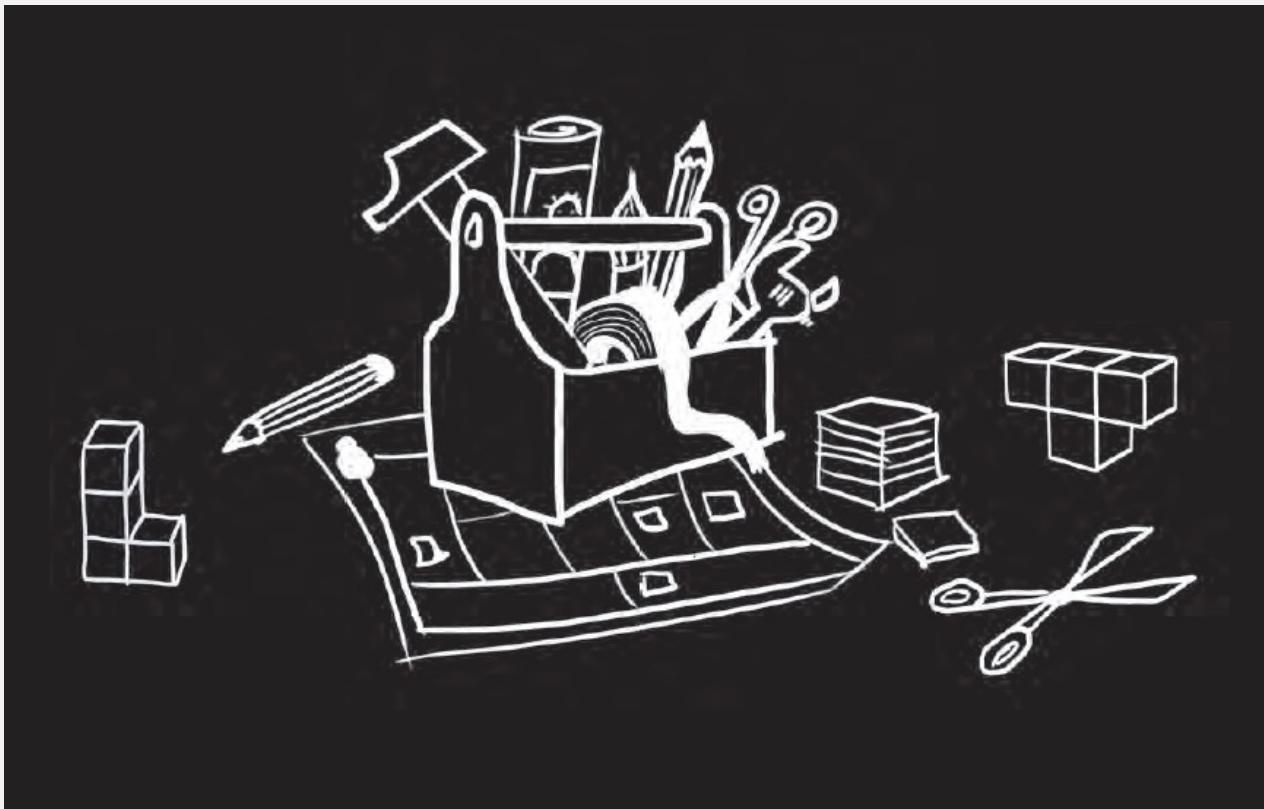
old	stimulant	appealing	demanding	appealing
thrilling	exceptional	impressive	satisfactorily	cheap
unambiguous	simple	easy to use	intimidating	anticipated
impressive	flexible	kind	frustrating	ordinary
helpful	inconsistent	innovative	intuitive	comfortable
complex	creatively	not valuable	slow	boring' <small>Get a PDF Premium Design Thinking Template:</small>

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-saving' <small>Get a PDF Premium Design Thinking Template:</small>

Experience and imagination | design thinking toolbox

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

Design thinking guerilla 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
<p>Introduction and explain the purpose</p> <ul style="list-style-type: none"> Encourage the respondents to express their opinion No right or wrong Audio and video recording Information gathered will be strictly confidential Estimated time: 120MIN Respondent self-introduction: <ul style="list-style-type: none"> Name and family members Insurance policies owned and from which service provider. Insurance policies considered buying in future and what prompted their interest of buying it. Top 3 selection criteria on insurance plan. 	<ul style="list-style-type: none"> Set the tone
Section 2. Testing Concept A 60MIN/ 65MIN)	Main Purposes
<p>Overview (20MIN)</p> <ul style="list-style-type: none"> 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? <i>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.</i> <p>Premium and sign up Interest (5MIN)</p> <ul style="list-style-type: none"> 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? <ul style="list-style-type: none"> If yes, what is the key attraction? Write down your expected premium. How do you come up with the premium amount? 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? 	<ul style="list-style-type: none"> 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

<ul style="list-style-type: none"> 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? <p>Additional features (30MIN)</p> <ul style="list-style-type: none"> Now, I'm going to show you some additional features of this insurance plan. <p>For each feature, check the following:</p> <ul style="list-style-type: none"> What product feature is about? <i>Check if the respondents understand the feature. Moderator to explain if they do not get it.</i> What do you think about this feature? Any pros and cons to you? Do you find it match your needs/ expectation? And why? <ul style="list-style-type: none"> What would be the perceived usage occasion/ benefits? Comparing with other medical insurance plans without this feature, what difference would it make? <p>After showing all features,</p> <ul style="list-style-type: none"> 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? <p>Final check (5MIN)</p> <ul style="list-style-type: none"> 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? <ul style="list-style-type: none"> 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

Section 3. Testing Mobile App (50MIN / 115MIN)	Main Purposes
<ul style="list-style-type: none"> 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? <ul style="list-style-type: none"> Anything you like or dislike about it? Anything you don't understand? 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? <ul style="list-style-type: none"> For what purpose? And why? What are the benefits of doing so? What differences would it make to you and your family? 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 showed 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? <ul style="list-style-type: none"> 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? Apart from yourself, would you consider buying this insurance plan for anyone in your family? If yes, for whom? If no, why not? 	<ul style="list-style-type: none"> Understanding consumers' initial appeal to the proposed mobile app and its features. Identify its influence on medical insurance plan purchases.

3

<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> Exploring consumers' expectation on a wellness program offered by an insurance service provider.
<p>Section 4. Exploring Wellness Program (5MIN / 120MIN)</p> <ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> Exploring consumers' expectation on a wellness program offered by an insurance service provider.

4

- Warm up
- Part 1

- Part 1

- Part 2

- Part 3
- Wrap up



Courtesy of Cimigo Consulting

Persona's development

Vivid persona sample

Story	Goals	Wants	
<p>Manee is a low-income mother from Nongyao village 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.</p> 	<p>Saving for her son's higher education Balancing time at home and work</p>	<p>Less intense workload A higher paying career</p>	
Needs	Fears		
<p>Having a stable occupation Being debt-free Living a healthier lifestyle</p>	<p>Unemployment Increasing debt Fatal illness</p>		
Manee Thongsuk	Daily	Often	Seldom
<p>Position Production worker Industry Food and drink Education Tenth grade Location Udonthani, TH Age 27</p>	<p>Assembling products Maintaining equipment School run for her son</p>	<p>Doing house chores Visiting village temple</p>	<p>Taking her mother to hospital for medical checkup Cooking</p>

Low-fidelity persona profile

Project:
Team:
Version & Date:

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.

PERSONA/USER PROFILES

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

Lewick / Link / Lewin
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.

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

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

Influencer
Who are the influencers

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

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

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

Gains
What makes the user happy?

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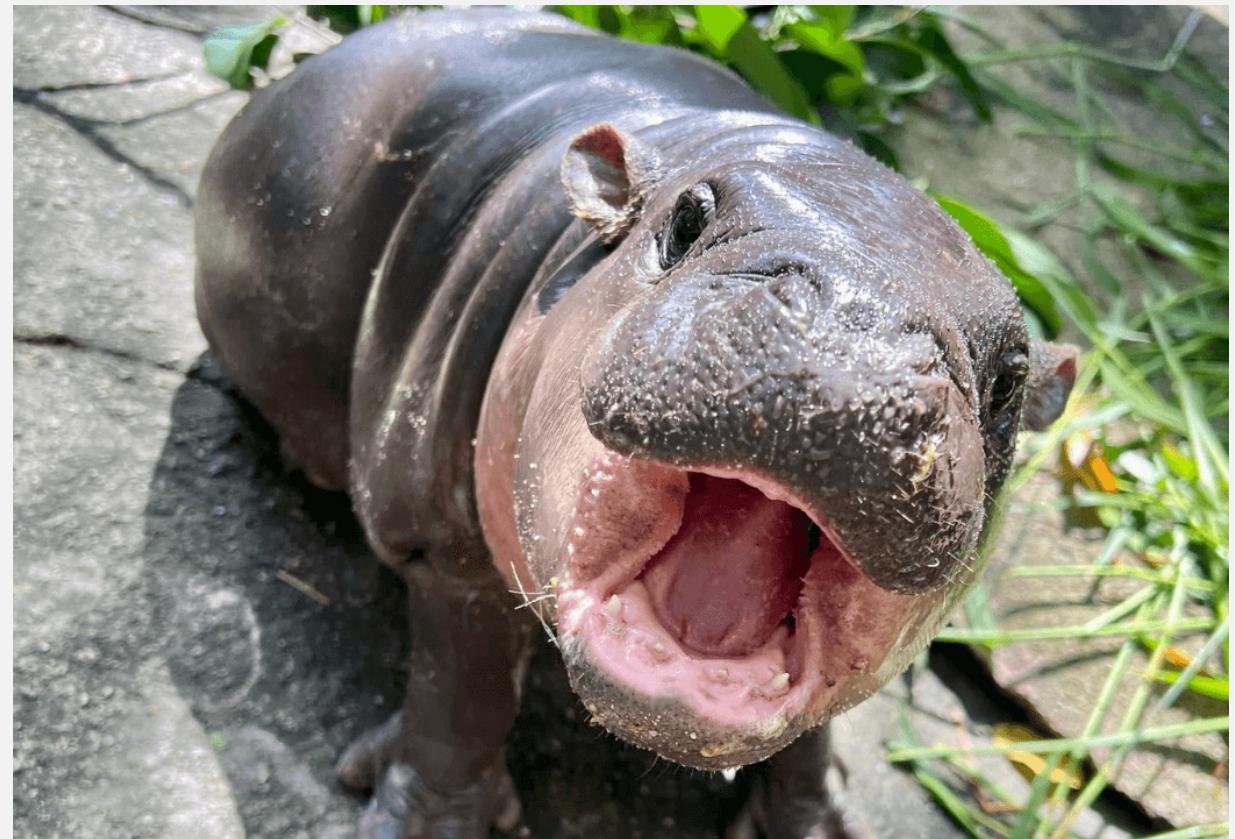
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BASIC TEMPLATE

Persona's development

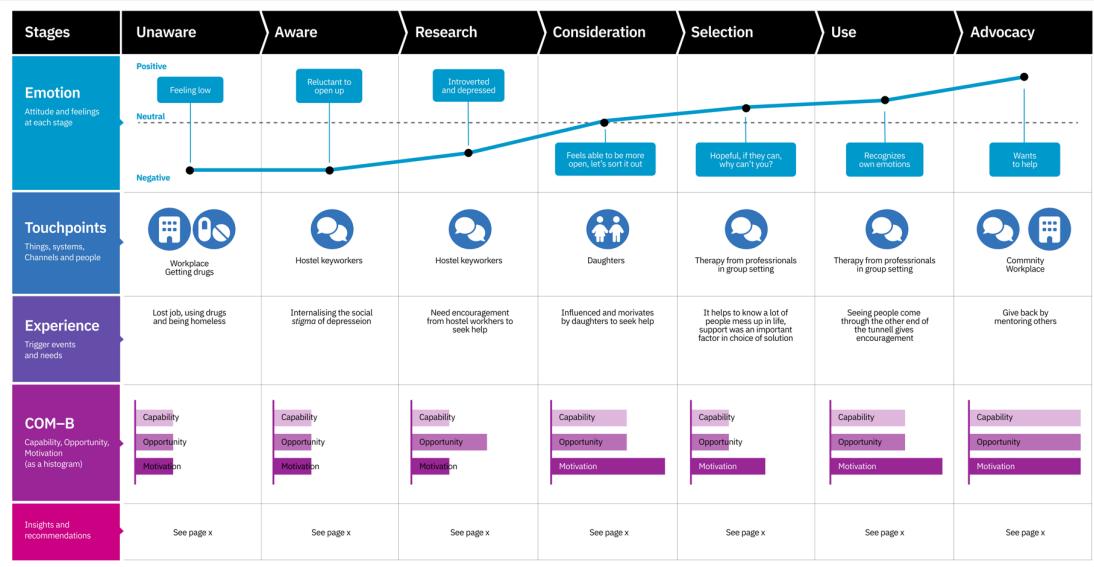


If you want to understand
the animals, get out into the
jungle.

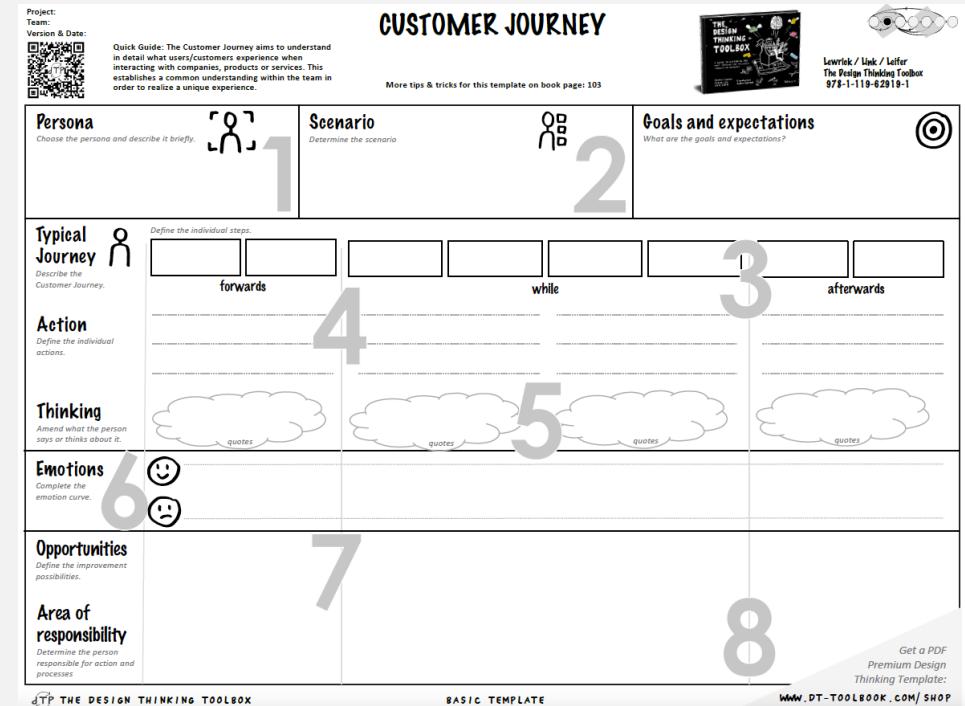


Journey mapping in a B2B context

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.

Prototyping and modelling | research questions

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.	

Removing bias

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

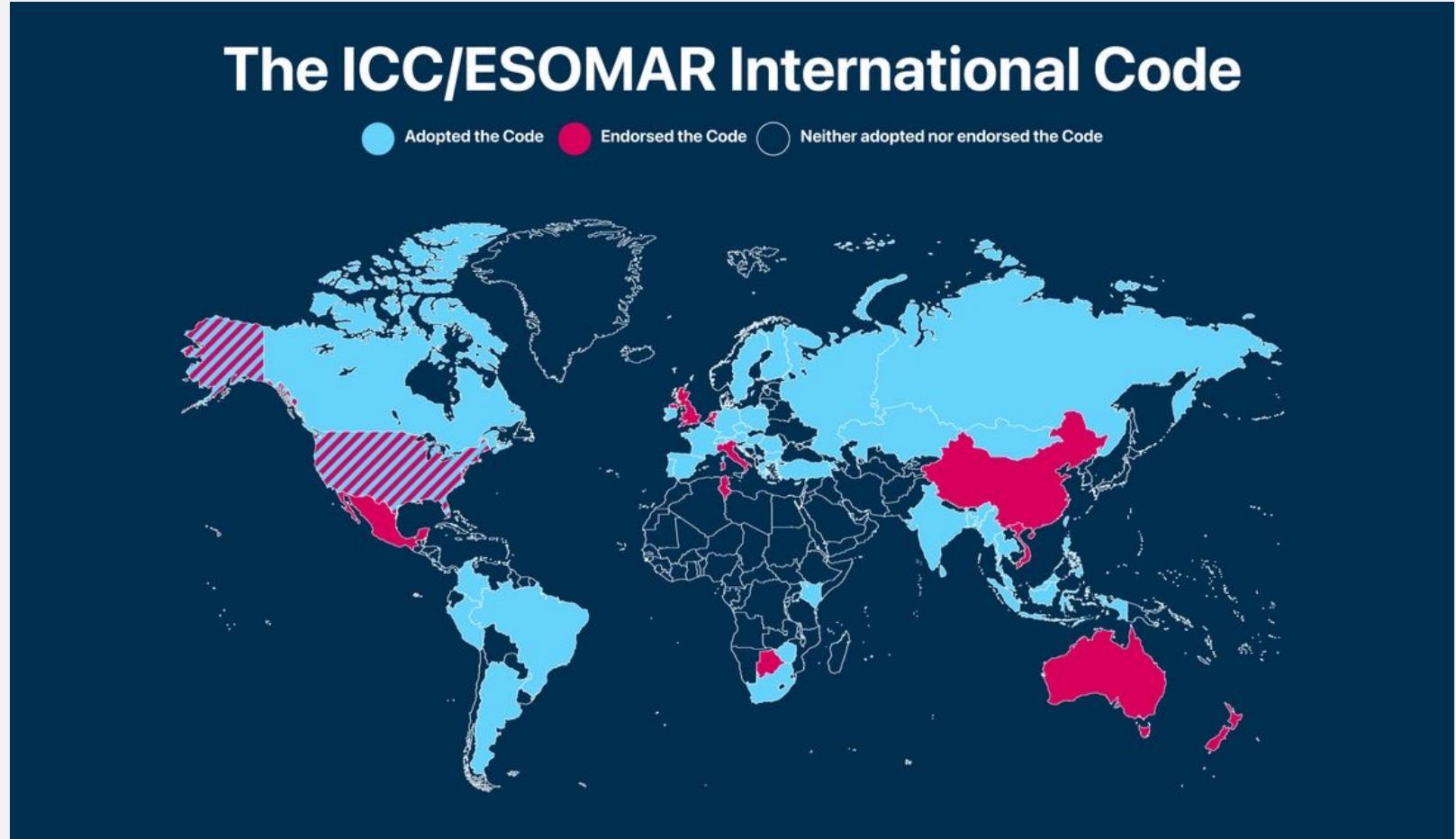
	Natural language in question design	Avoiding assumptions	Balancing participant representation	Minimising interviewer influence	Using triangulation to validate findings	Blind or double-blind techniques
Goal:	Craft questions that do not lead or suggest answers.	Approach each interview with an open mind, 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



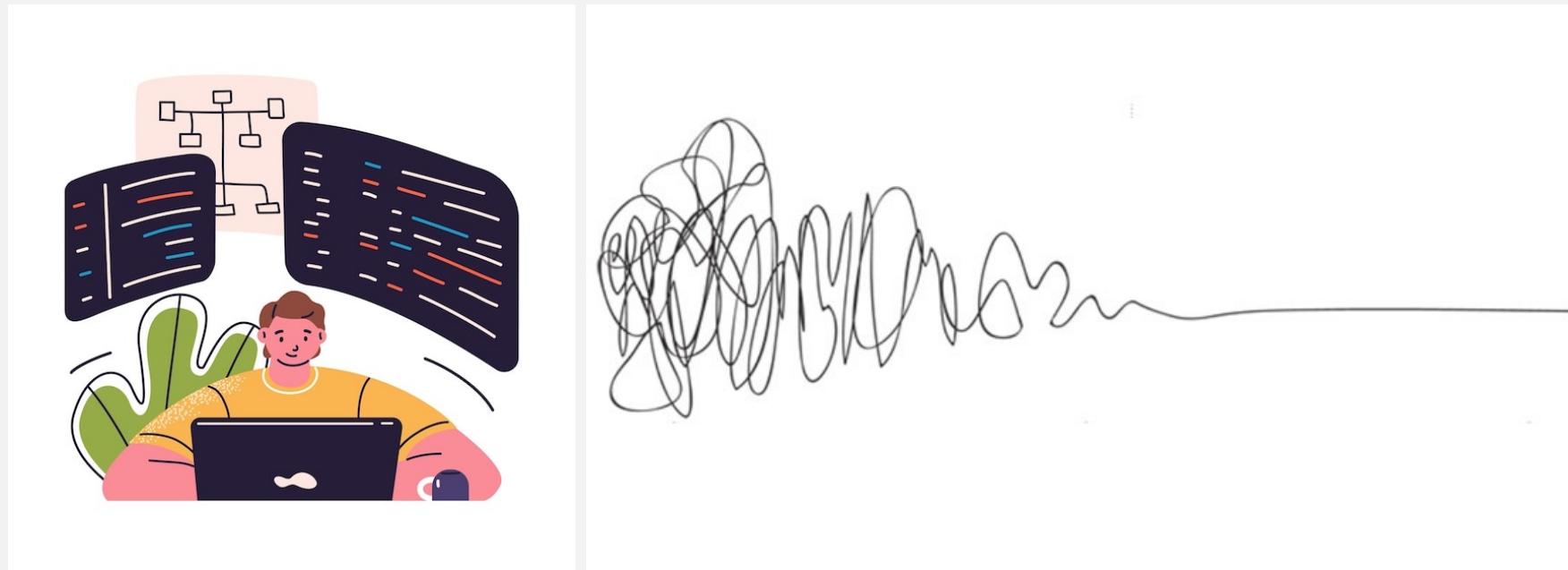
ESOMAR's guidelines are widely recognised for setting the ethical standards for market, opinion, and social research.

Prototyping and modelling| research insights

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
<ul style="list-style-type: none">• Review all transcripts, notes, and materials.• Take time to deeply immerse yourself in the data.• Note initial impressions or recurring themes.	<ul style="list-style-type: none">• Use thematic coding to organize the data.• Label key ideas, phrases, and insights with codes.• Group similar codes into broader categories.	<ul style="list-style-type: none">• 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.



Synthesizing research

Techniques

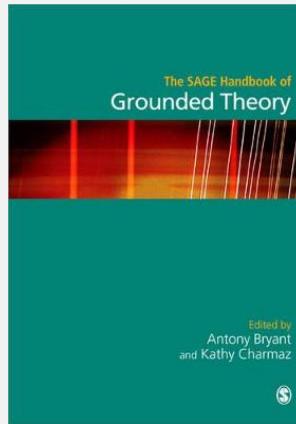
Concept Mapping	Framework matrices	Data triangulation	Ensure objectivity
<ul style="list-style-type: none">• Visualize connections between themes.• Create diagrams or flowcharts that show relationships.	<ul style="list-style-type: none">• Use a matrix to compare themes across different data sources or participants.• Helps structure and organize complex data.	<ul style="list-style-type: none">• Compare data from different methods or sources (interviews, focus groups, observations) to validate findings.• Ensures a comprehensive synthesis.	<ul style="list-style-type: none">• Regularly revisit the data to check for bias.• Collaborate with colleagues or co-researchers for multiple perspectives.• Use data triangulation to strengthen findings.



Synthesizing research

Coding the data

Traditional



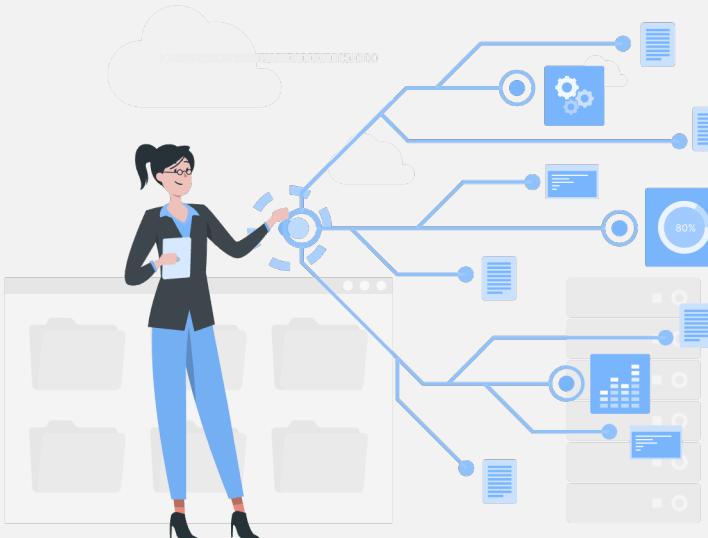
GTM (Grounded Theory Methodology)

The hack



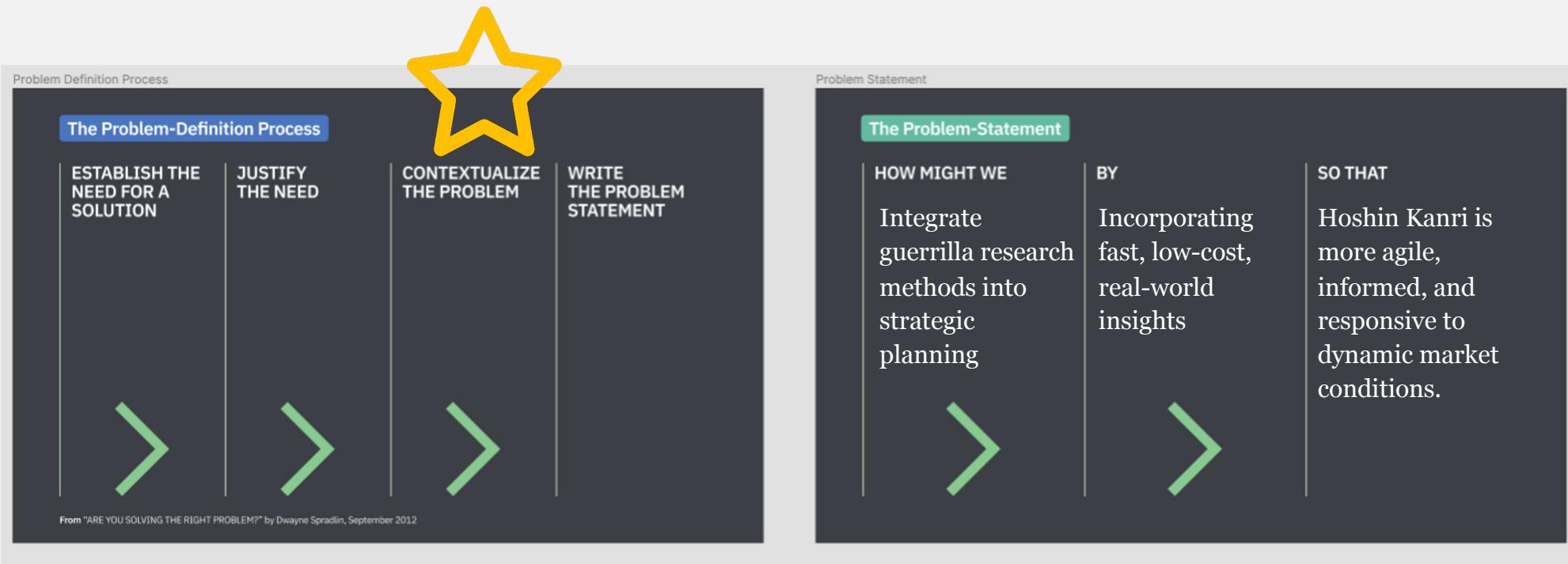
Speech to text
(Natural Language Processing)

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
<ul style="list-style-type: none">Start with the major themes and patterns from the synthesis process.Prioritize findings that directly align with your research objectives or business needs.	<ul style="list-style-type: none">Place the synthesized themes within the broader business or research context.Consider how the findings address real-world challenges or opportunities.	<ul style="list-style-type: none">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?	<ul style="list-style-type: none">Develop clear, targeted recommendations based on the key insights.Ensure recommendations are specific, relevant, and feasible.	<ul style="list-style-type: none">Rank recommendations by importance and impact.Highlight quick wins versus long-term strategic changes.	<ul style="list-style-type: none">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

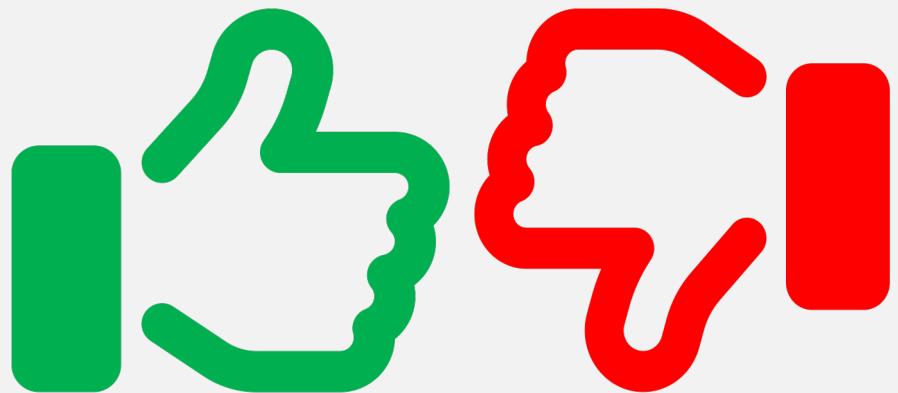


Value creation | research analysis

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.

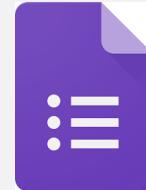


Lean validation techniques

	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?

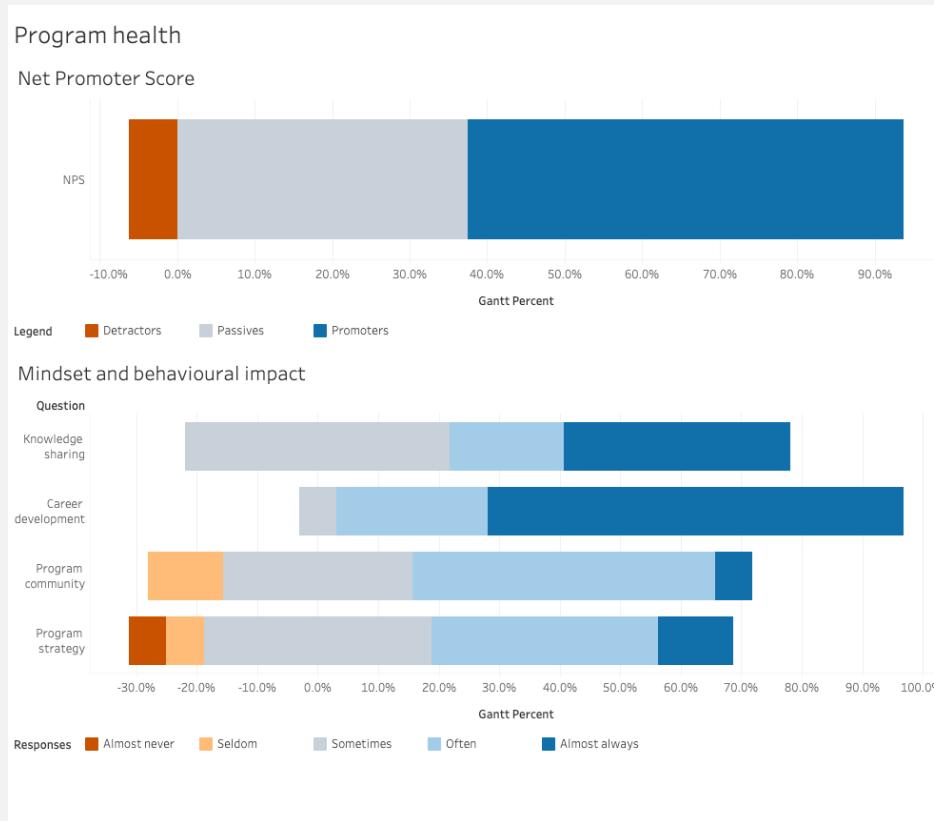
Conducting surveys

Key steps in analysing survey data eg, NPS

Data cleaning	Descriptive statistics	Categorizing qualitative responses
   	<ul style="list-style-type: none">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. <ul style="list-style-type: none">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).	<ul style="list-style-type: none">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.

Conducting surveys

Key steps in presenting and visualising survey data



Use charts and graphs for visual vocabulary

- **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.

Simplify Complex Data

- 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

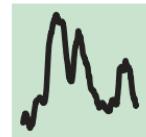
Change over Time

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: Alen Smith, Chris Campbell, Ben Bell, Leanne Grimes, Pamela Perello, Billy Shersling, Shannon, Paul McCallum, Marita Orlitz
Inspired by the Google Classroom by Jon Schaffer and Genevieve Wilson



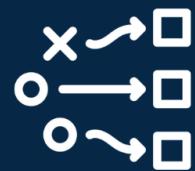
ft.com/vocabulary

Deviation	Correlation	Ranking	Distribution	Change over Time	Magnitude	Part-to-whole	Spatial	Flow
Emphatic variations (+/- from a fixed reference point). Typically the reference point is the mean, median or a long-term average. Can also be used to highlight the extremes (positive/negative/sgnitive).	Show the relationship between two or more variables. Be mindful that, unless you are careful, the order of the variables will assure the relationships you show them in (e.g. A is related to B, but B is not related to A).	Use when all items position in an ordered list is more important than its rank. When the items are ordered, it's often better to highlight the peers of interest.	Show values in a dataset and how often they occur. The shape (or 'view') of a distribution is often the most important way of highlighting the lack of uniformity or regularity in the data.	Give emphasis to changing trends. These can be short (intra-day) movements or extended series traversing decades or centuries. Choose the time period carefully to provide suitable context for the reader.	Show size comparisons. These can be relative (just being able to see larger/smaller) or absolute (being able to see differences). Usually these show a large value (e.g. population, area, money, dollars or people) rather than a small value (e.g. a percentage point).	Show how a single entity can be broken down into its component elements. It's important to consider the size of the components, as well as the size of the whole entity.	Avoid from having maps only used when precise locations or geographical proximity are important to the reader than anything else.	
Example FT uses Trade surplus/deficit, climate change	Example FT uses Inflation and unemployment, income and its expectancy	Example FT uses Wards, deprivation, longitude, constituency election results	Example FT uses Income distribution, population density, attribution, revealing inequality	Example FT uses Share price movements, economic time series, sectoral changes in a market	Example FT uses Commodity products, market capitalisation, volume in general	Example FT uses Postal budgets, company structures, national election results	Example FT uses Population density, natural resources, location, disaster risk impact, catchment areas, variation in electric realms	Example FT uses Movement of funds, trade, migrants, banks, oil, the routes, relationship graphs
Diverging bar A simple standard bar chart that can handle positive and negative magnitude cases.	Scatterplot The standard way to show the relationship between two or more variables, each of which has its own axis.	Ordered bar Standard bar charts display the ranks of values easily when sorted into order.	Histogram The standard way to show a statistical distribution. It highlights the gaps between categories and the shape of the data.	Line The standard way to show a changing time series. Good for irregular data points.	Bar The standard way to compare the size of categories. Can be stacked or start at the zero line.	Stacked column/bar A simple way of showing part-to-whole relationships. It may be difficult to read with many components.	Basic choropleth (raster) The standard approach for putting data on a map. It's good for data series rather than totals, as it preserves local geography.	Sankey Shows changes in flows from one condition to another. Good for tracing the eventual outcome of a complex process.
Diverging stacked bar Perfect for presenting two contrasting series that involve sentiment (e.g. divergent log divergence).	Column + line headline A good way of showing the relationship between two variables, one of which has changed over time.	Ordered column See above.	Dot plot A simple way of showing individual data points or range of data across multiple categories.	Dot strip plot Good for showing individual values in a scatter plot. It's a good problem when the data has a key part that has the same value.	Paired columns As per standard columns but allows for comparison. Can become tricky to read with more than 2 series.	Marimekko A good way of showing multiple data series and proportion of data at once. It's good as long as the data are not too complicated.	Proportional symbol (map/infographic) Use for notable ratios or very small differences. It's good when small differences in data will be hard to compare.	Waterfall For showing the flow of data through a few processes. Can include +/- components.
Spine Shows a single value into two contrasting categories (e.g. male/female).	Connected scatterplot Usually used to show the relationship between two variables that have changed over time.	Ordered proportional stacked Use when there are big differences between categories. Good for showing the difference in data is not so important.	Dot bubble Data plotted in order to show space-efficient ranks across multiple categories.	Barcode plot Like an x-axis, good for displaying the data in a table, it's also good for highlighting individual values.	Slope Good for showing changing data over time, but usually best with a key point.	Pie A common way of showing proportions. It's good for data that's difficult to accurately compare across the segments.	Flow map Designed to show the flow of data from one condition to another through a few processes. Can include +/- components.	Chord A complex but powerful diagram for showing connections between nodes (not just 2 nodes).
Surplus/deficit fixed line The shaded area of these charts is used to balance the two sides of the chart.	Bubble Like a scatterplot, but also additional data by adding the circles to a third variable.	XY heatmap A good way of showing the patterns between 2 variables. It's good, but less effective at drawing fine differences in amounts.	Sticks Perfect for showing how ranks have changed over time or vary between categories.	Violin plot Similar to a box plot but more effective with complex distributions. It's good for showing data that's summarised with simple averages.	Area chart Use with care, these are good for showing change over time, but showing change in areas can be very difficult.	Marimekko A good way of showing the ratio of two variables at the same time - as long as the data is not too complicated.	Contour map For showing the value of something across a map. Can use deviation contours to highlight 'shov-ing' values.	Network Used for proving the existence of inter-connectedness between multiple varying types.
Surplus/deficit fixed line The shaded area of these charts is used to balance the two sides of the chart.	Connected scatterplot Usually used to show the relationship between two variables that have changed over time.	Dot bubble Data plotted in order to show space-efficient ranks across multiple categories.	Boxplot Summarises multiple distributions by their median, range and outliers.	Violin plot Similar to a box plot but more effective with complex distributions. It's good for showing data that's summarised with simple averages.	Candlestick Used specifically for showing the price of stocks. These show both the opening and closing points of each day.	Proportional symbol Use when there are big differences and/or seeing data across multiple categories where data is not so important.	Equalised cartogram (raster) Converting each unit on a map to a regular and equal size. It's good for representing data with equal values.	Dot density Used to show the location of individual data points. Make sure to annotate the dots for the reader to see.
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Conducting surveys

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
<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> 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). 	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> Compare the performance of both versions based on the chosen metrics. Look for statistically significant differences between A and B.

Project: Team: Version & Date: Quick guide: The A/B test can be used as a stand-alone test or as an extension of a test from a prototype. The A/B test is a simple way to compare two different versions of a page, for example. The test of the prototype usually answers a question with different characteristics.

More tips & tricks for this template on book page 233

A/B TESTING

Learning objectives
What are the learning goals?

Customer segments
Which user groups are used for testing?

How should it be tested?
What does the prototype or experiment look like?

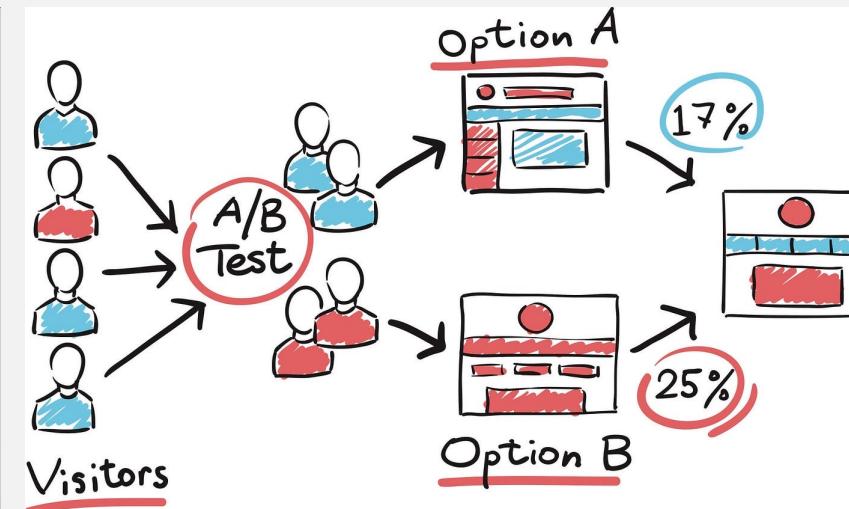
Test results
Evaluation of test results

Findings
Which version suits best the preferences of the customer segment?

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1 2 3 4 5

BASIC TEMPLATE



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.

The role of qualitative and quantitative data validation



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

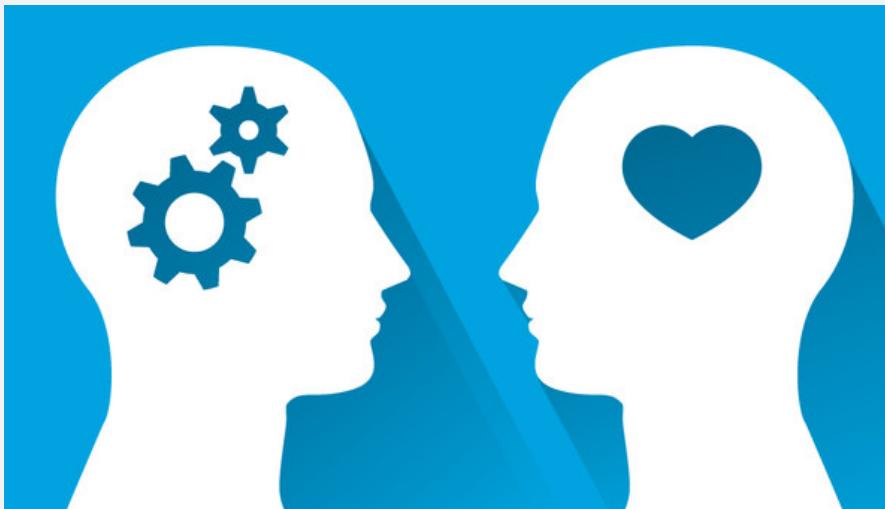
- **Emotional response:** excitement, relief, validation of vision.
- **Impact on decision-making:** confidence to scale or move forward.
- **Potential pitfall:** overconfidence can lead to prematurely scaling or missing subtle issues in the data.

Bad news

- **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.

Responding to research insights

Balancing emotion and logic in response.



Stay objective

- 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 a step back

- Take time to process emotionally charged insights before making key decisions.
- Seek advice from co-founders, mentors, or trusted team members to gain perspective.

Responding to research insights

Handling good news.



Celebrate, but stay cautious

- 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.

Use momentum for motivation

- Good news can fuel momentum—use it to push the team forward while keeping research-backed goals in mind.

Responding to research insights

Handling bad news.



Pivot, don't panic

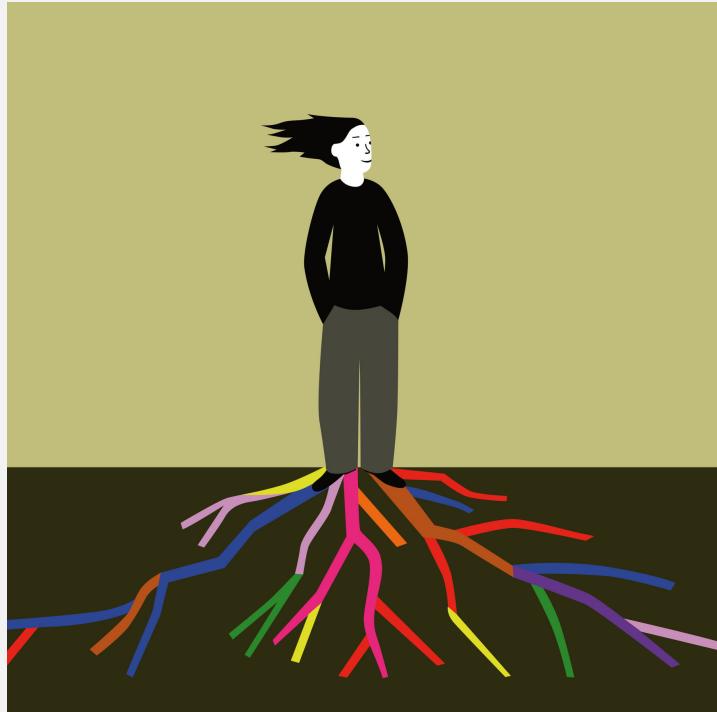
- If insights suggest a feature or strategy isn't working, pivot rather than scrapping the idea entirely.
- **Example:** a pilot program fails to meet expectations; instead of abandoning the idea, adapt based on feedback and iterate.

Embrace the learning opportunity

- 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.

Responding to research insights

The importance of founder resilience.



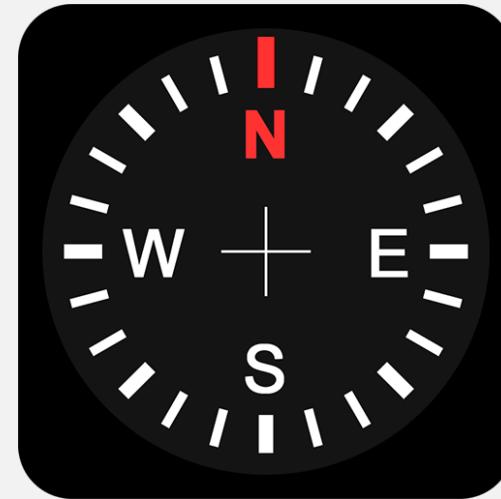
Emotional resilience

- 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.

Strategic resilience

Build a culture that values data-driven insights, even when they bring bad news, ensuring your business can adapt without losing momentum.

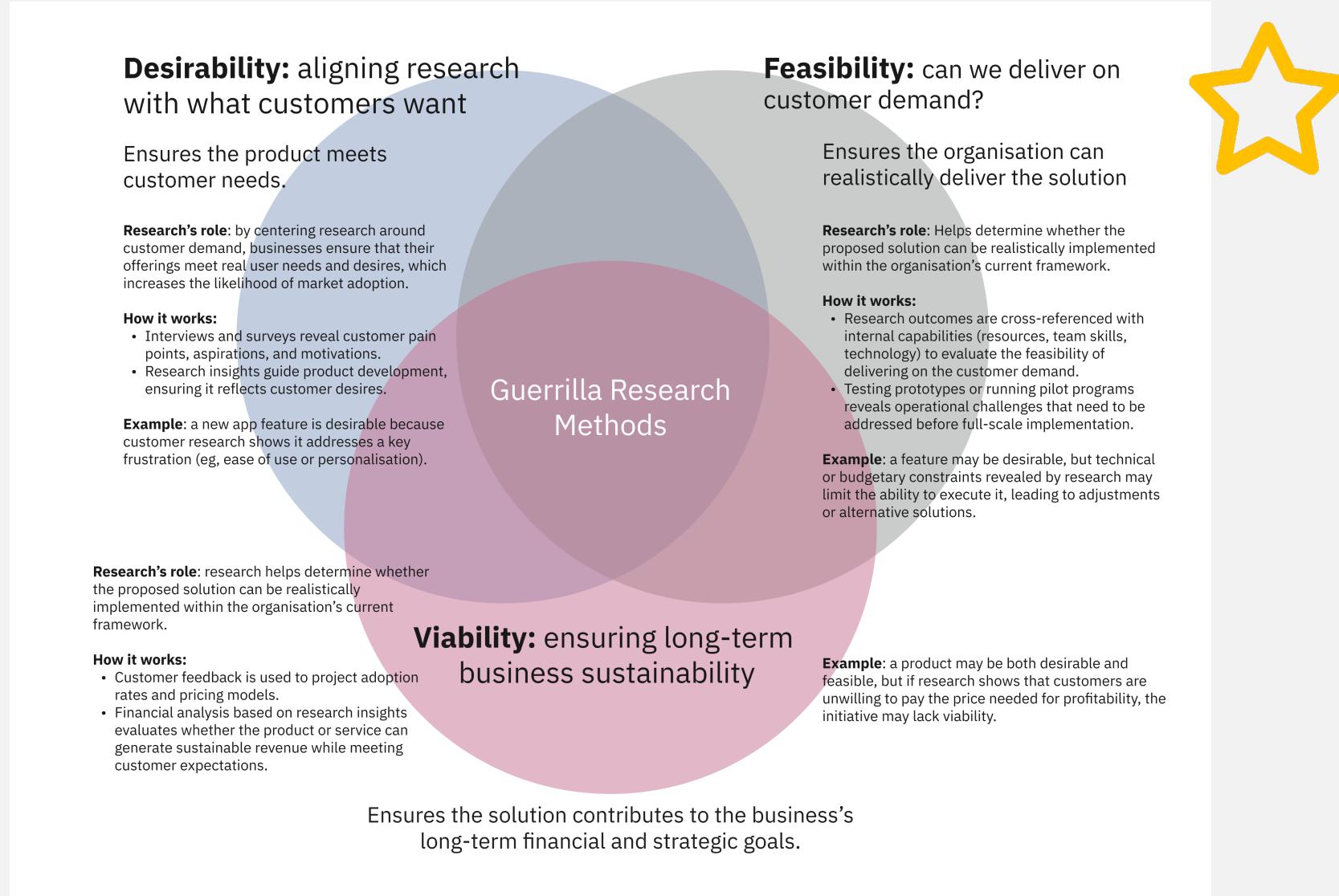
Alignment with customer demand



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



Iterate or pivot?

Understanding the difference.

Iteration

Making incremental improvements to refine the current product, service, or strategy based on customer feedback.

Pivot

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.

Iterate or pivot?

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

Focus on the evidence from customer feedback, market trends, and financial data. Does the data suggest improvement potential or a fundamental misalignment?

Test and experiment

Before making a drastic decision, run small tests or pilots to validate whether iteration will solve the issues or if a pivot is necessary.

Involve key stakeholders

Discuss findings with co-founders, advisors, and key team members to gain diverse perspectives on the best course of action.

Breakout groups

GreenCycle	HealthSync	LifeHaven	TalentFlow

Break

Leadership and negotiation| experiential workshop

Leadership and negotiation| reflection

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

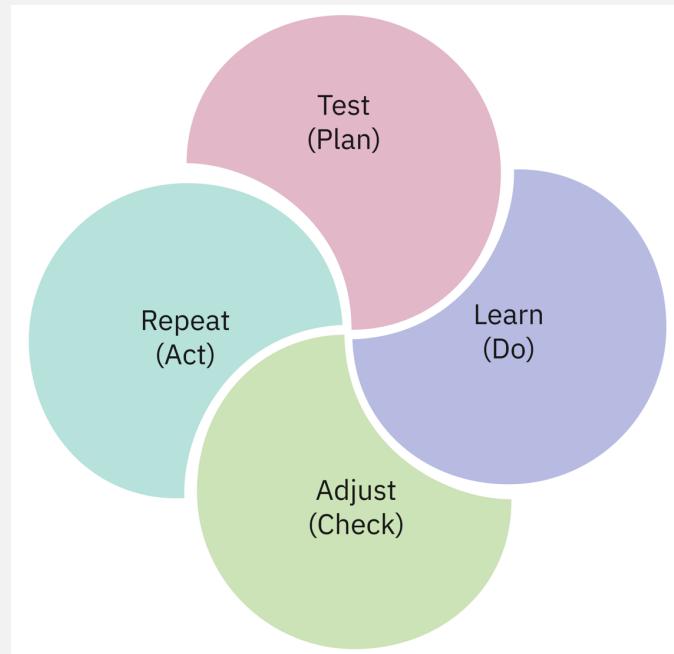
Reflection

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 ✓ |
| | <u>10. Reflection</u> |

Iteration and continuous learning

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

reference-books Public

main 1 Branch 0 Tags Go to file Add file Code

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File	Commit Message	Last Commit
LICENSE	Initial commit	last year
README.md	Update README.md	last year
academic	Update and rename academic-books to academic	last year
authorship-writing	Update authorship-writing	last year
behavioural-science	Update behavioural-science	last year
design-practice	Rename innovation-design to design-practice	last year
design-theory	Update design-theory	last year
hacking-kaizen-guest-reading	Update hacking-kaizen-guest-reading	1 minute ago
innovation	Rename innovation-general to innovation	last year
leadership	Update leadership	last year
manufacturing	Create manufacturing	last year
marketing	Update marketing	last year
neuroscience	Create neuroscience	last year
strategy	Create strategy	last year
workshops	Create workshops	last year

grahamnewman Update hacking-kaizen-guest-reading

Code Blame 51 lines (41 loc) · 4.19 KB

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Spotify: <https://open.spotify.com/show/4V0uerbFYYXW8U2TmZtJ?si=1SeIjyULQewQjx0GxofA>

Apple Podcasts: <https://podcasts.apple.com/us/podcast/hacking-kaizen/id1740258707>

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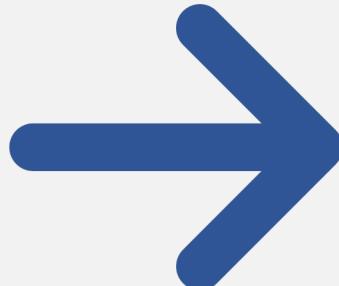
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Key take away

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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