About Face
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##Collaborative Product Design Pt 3##

Users

⑨ Users & User Research

- Personas vs. Profiles vs. Roles vs. Archetypes

User model w/ 3 attributes: tasks, contexts & influencers

→ what the user does, where & when & how & with whom, why the user does it

work w/ enough detail to make decisions, its fidelity

help to design the "right" thing, can be negative or positive (pain or gain) (intended or unintended)

Motivations, Goals, & Jobs-to-be-Done (JTBD)

* The core functional job defined in a single statement & is the users primary motivation

"You can focus on only the user attributes you need for the product you're building"

* Talking about users as demographics or psychographics (ex. "values time with friends") you're NOT talking about their actual goals or the job to be done

* Talking about features or technology is NOT talking about JTBD

* Even users won't talk about their goals

→ Fidelity Needed

	User	Role	Persona
Task	X	X	X
Context		X	X
Influencers			X

* identify what info is neede to get this fidelity & now you know what user research is neede

Project Goal	Attr. needed
• + content // fxns • ↑ efficiency • ↓ errors • ↑ output qlty	+ Tasks + Contexts
• ↑ conversion, adoption, retention engagement, social activity	+ Influencers

Project Goal	Attr. Needed
• ↑ cust. value • defense • innovate new markets • disrupt existing mkts	+ Goals & JTBD

*4 types of User Research

- direct + indirect observation + provides insight in +++ behaviors + Attitudes

what they do
- Design ethnography (direct)
- analytics (direct)
- stakeholder interviews (indirect)

what they say
- User interviews (direct)
- Search Analytics (indirect)
- Customer support logs (indirect)
- " feedback + surveys (indirect)
- Diary studies (indirect)

* direct behavioral research requires more time + resources

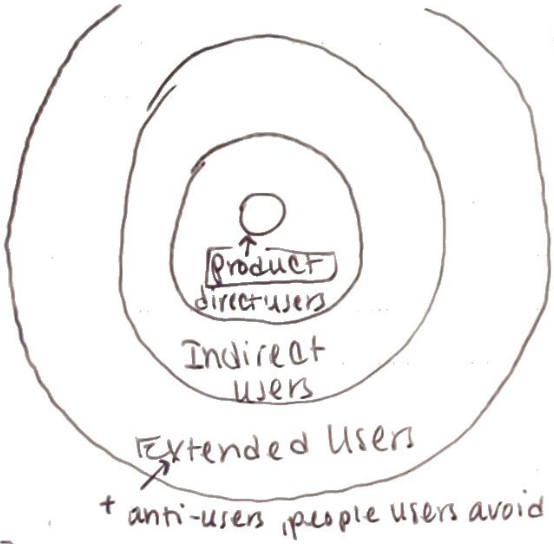
* proto-personas, ad hoc personas, or assumptive personas are less accurate but help focus teams around user-centered thinking + test-driven design

* separate collaboration goals from research goals + you can improve personas over time.

⑩ Identify Users with the Bull's-Eye Canvas

* Everyone on the team should understand who you're building for + why

x **NOTE: details on the bull's-Eye Canvas approach are in this Chapter



* Use at the start of the project to align the team around the same list of users + identify users for journey mapping + flows or interface ideation

http://pxd.gd/users/user-target

"Frame discussion to focus on anyone who could be affected by the product or by the direct + indirect users."

⑪ Explore User attributes with the Profile Canvas

* typically Create User profile canvases to kick off project discovery + at any time

* User Profile Canvas "visual ~~[illegible]~~ checklist to help the team think about ~~are~~ users tasks, contexts + influencers"

The User Is Always Right
Steve Mulder

(11) Profile Canvas, cont'd

zee

(1) list of tasks + contexts (2) identify user's goal or job-to-be-done
(3) list of user's pains (4) list of the user's gains

→ write the user's name at the top of the canvas

http://pxd.gd/users/profile-canvas

* Steve Mulder, discuss users' goals at different levels
(a) supreme motivator (b) motivator (c) goal (d) need (e) Task

"tasks like rings on a ladder that leads up to the goal"

* probe for goals w/ the 5 why's, get to second level thinking + climb the levels of Mulder's user goals + you can capture these why's on ~~the~~ the profile canvas

* required + expected gains are called "must-be's", they must be present in the experience vs. desired gains which are "icing on the cake"
  * Kano model, desired gains ≈ attractors

* Rank gains from most desirable to least desirable

(12) User Needs + Preferences w/ the Attr. Grid

→ Attribute grid helps to narrow down what info you need about a user

(1) capture insights + observations (2) make sense of data
(3) identify primary customers
↳ A.K.A.
(1) generate insights (2) refine (3) interpret + analyze (4) document + share

* it's a living document

http://pxd.gd/users/attribute-grid

→ Uses Tshirt sizing to compare users against each other on the attributes + give the sizing a value (ex. S: once a day, M: 4x day, L: 10x day)

Aspects of User Attributes:
(a) Physical context
(b) info-seeking behaviors
(c) Comms behaviors
(d) Collab + social behaviors
(e) preferences
(f) content format / preferences

Refine: remove unnecessary issues + try to replace T-shirt sizes w/ real data to be as accurate as possible

"if you do not continually identify research needs + push for more research everything the exp. machine creates will come up short."

*identify the most important users according to the grid & compare w/ what users the organization ~~thinks~~ is most important

"Design targets identify the ↑valuable users in the exp. machine should focus on. On a long enough timeline, all users are precious, & all products are used by everyone in delightful ways."

↳ No project timeline is ever long enough, who can your exp. machine help now?

*Document & Review:

① what's different than we thought?

② What did you learn?

③ what are you still tracking?

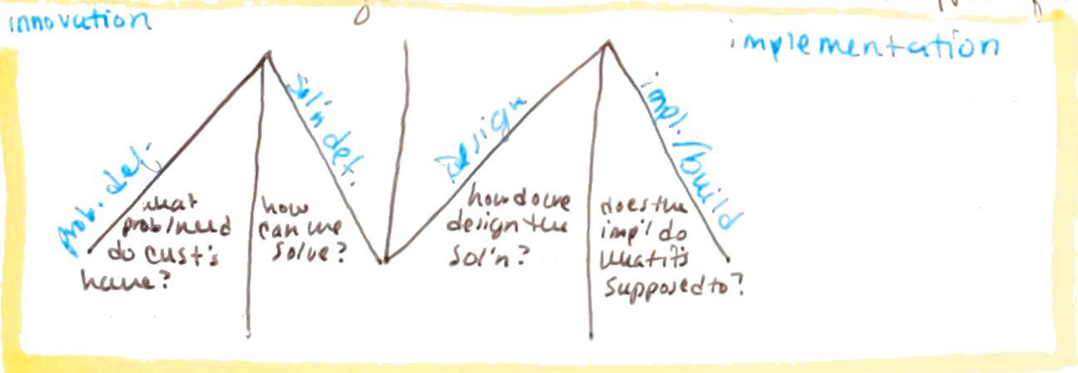
*The grid tracks why you should design the product a certain way, not how

* forms the foundation for personas

⑬ Document & Share User Models

"To make good user models, you have to learn how to write briefs & create infographics

- ingredients that go into a user model
- diff. ways your team may use them
- diff. ways to communicate various types of info


innovation
implementation
prob. def.
what prob/need do cust's have?
sol'n def.
how can we solve?
Design
how do we design the sol'n?
impl./build
does the imp'l do what it's supposed to?

*Innovation Teams have 2 big q's:

① what prob/needs do users have? what can we make better?

② what ways can we solve those problems? what sol'ns can we pursue?

- if you think about projects as implementation or innovation you can create 2 kinds of user models:

→ those that reveal how you should innovate & those that show you how to implement

*innovate == need rationale for what to build, imp'l == need guideli...

	Rationale (what)	Guidelines (how)
Goals	* why is the user trying to do this?	
Tasks	what capabilities does a user need?	what content/fxnlty should we build?
Context	where & when users engage?	how to build content/fxnlty to be usable in the right contexts
Influencers	what outcomes/prefs influence user behavior	How do we build to ↑ adoption & engagement?

User Models come in 3 formats:

- References (reminders)
- One-Sheets (document)
- Side/Side (compare/contrast)

* can note positive things (ex. has XYZ, does XYZ, etc) & negatives (doesn't have or do XYZ) or should be avoided

*can also use binaries to show attributes as a continuum & can more quickly share some info.

"Use binaries when you want to suggest a user is more than one attribute than another."

* however. binaries can hide individual attr.s if the two items aren't actually opposite of each other/exclusive.

*assigning value ex. tea ∅ ——●—— 100 can help compare/contrast

"Although real names humanize user models, real names also attach human histories & biases."

↳ if stereotypes cause the team to make bad, ↓optimal decisions, ditch the name & use an actual title.

↳ also be aware of the representative image. Can use illustrations & sometimes the biases can help as reminder to think differently. Can also have an image that shows the wider context

↳ can also change refs. based on audience & their internalized context

- Also include: ① user relationships ② place in user lifecycle ③ place in product lifecycle ④ metrics
  - compare & contrast w/ columns or grids

snapshot ↖ columns; grids ↘ detailed info

* better comms beats consistency, every time
* focus on research or guidelines, not both, rarely do ppl want to know what to build + how to build at the same time
* highlight the most important info prominently in the one pager design

"... what is the one thing they need to know to be successful? Or, what one thing must they know to avoid failure?"

* User models are used in 3 ways:
  ① during discussion as reference
  ② ingested to determine what to build
  ③ reference user models to make decisions about how to build the product
* Can use stickers! or cards!
* can put models in the slideshow template so it's ready to go
* limit addt'l work as much as possible