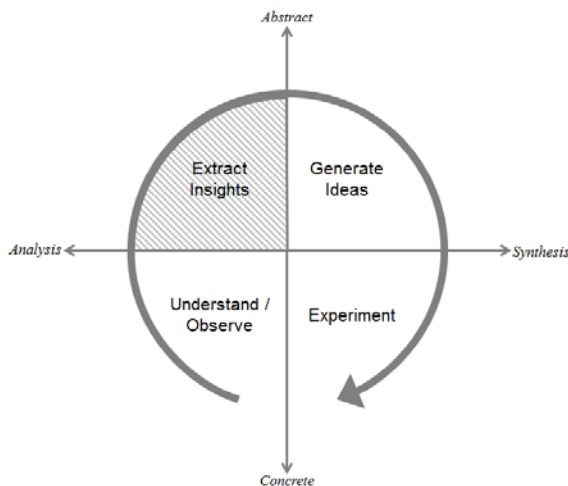**MPAR 2015**

Work Guide #3: Extract Insights Guide

To be completed

NO LATER THAN

1/13/15

MPAR EXTRACT INSIGHTS GUIDE:
TABLE OF CONTENTS

MPAR OVERVIEW

|----------------------------------PRE – NAPA ---------------------------------| |-----NAPA-----|

	Part 1 Team Launch	Part 2 Understand and Observe	Part 3 Extract Insights	Part 4 Ideate, Iterate and Recommend
TIMING	Teams announced on 12/11/14 2-hour team meeting at a time of the team's choosing before 12/20/14 (You can shorten this time by completing individual pre-work before the meeting.)	Individual work to be completed between 12/11/14 and team's "extract insights" meeting, according to your Team Workplan.	January team meeting to share insights and develop "how might we?" questions (3-hour meeting at time of team's choosing)	January 16th – 17th, 2015 in Napa with clients
ACTIVITIES	Schedule a team call with your instructor Get to know each other Explore the challenge Complete your Team Workplan	Possible client call Complete individual research and individual research summary assignment	Have a 3-hour meeting to share insights and create "how might we?" questions for Napa	Iterate with the client to: - Test insights - Generate ideas - Test ideas - Fine-tune stories
TOOLS TO USE (PFPS AND OTHERS)	Team Workplan template Dynamic balance of diverge/converge Affinity diagramming Dot voting	Individual Research Report template Ethnographic interviewing Expert interviewing Web research	Customer journey maps Customer empathy maps 2x2s Industry ecosystem maps Statement starters Stories	Post-it brainstorming Metaphors Dot voting PPCo
DELIVERABLES	Team Workplan (12/20) Set time for January debrief meeting	Individual research report assignment (1/9 before 5:00 p.m.)	Summary of team's work with photos due 1/13 before 5:00 p.m.	Documentation of team's work to be given to the client (template will be provided on 1/17 along with time to complete the work)

This teamwork guide covers the third column of work, Extract Insights. We'll issue one additional work guide to support your work in Napa.

EXTRACT INSIGHTS TEAM MEETING OVERVIEW

Activity	Estimated Time
01 Debrief: Affinity Diagramming	50 minutes* (*Assumes individual posting to Stormboard during individual research work)
02 Extracting Additional Insights Round One (Customer Insight and Orthodoxies)	40 minutes (Two teams working in parallel)
Synthesis and Sharing	15 minutes
03 Extracting Additional Insights Round Two (Discontinuities and Company/Industry Maps)	40 minutes (Two teams working in parallel)
Synthesis and Sharing	15 minutes
04 Capturing Work and Moving Forward	20 minutes

Your team meeting will be more effective if each of you has taken the time as you are doing your research to post interesting findings or insights on Stormboard. Although you are likely to want to review some of them during the meeting, having a completed preview will simplify the sharing process.

Your "extract insights" meeting will focus on getting you to a shared set of "how might we?" questions that essentially reframe the challenge you were given by the client as a result of what you learned in your individual research. You will then take these "how might we?" questions with you to Napa where you will generate solutions.

At the end of your meeting, we ask that you complete the shared Team Insights template and submit it to your project bCourses site NO LATER THAN 5:00 p.m. on 1/13/15.*

(Format = MPAR2015_Insight debrief _client challenge_team# -- e.g. MPAR2015_Insight Debrief _FORD_team1)

PREPARING FOR YOUR TEAM MEETING

Each of you on the team will have individually completed a number of interviews – both expert interviews and ethnographic interviews with customers – as well as done some online research. You should come to the meeting prepared to share what you have learned from that work. Remember that you are focused on generating insights (which we defined in the last workshop guide), and that innovative thinking is built on a foundation of novel insight. **It may help to review the "what is an insight" section of guide #2 before you meet with your team.** As you report on what you've learned you should plan to describe:

- Source of information (description of the interviewee if by interview, online resource otherwise) (e.g., http://www.textinganddrivingsafety.com/texting-and-driving-stats/)
- Key facts you learned or observations you made (e.g., 77% of teens believe they can safely text while driving, 23% of accidents are the result of texting while driving)
- Insights you gleaned, understanding a situation in a different way: (e.g., It will be difficult to change texting-while-driving behavior, so we need to make communicating while driving safer)

Ideally, you will write many of your key facts and insights on post-it notes (one item per post-it note) BEFORE you go to the meeting. This will save time at the meeting and allow you to more quickly get to the synthesis work you want to get done. Although you may have insights from your individual work, many of your insights will come from the synthesis of the information you have collectively gathered. This guide aims to give you a set of tools to use as you work together to identify the key insights that will drive your ideation work in Napa.

You will want to have the following materials available for your insights debrief:
- Post-it notes (3x3 and 3x5 are ideal)
- Sharpies to write on the post it notes
- A large wall space, ideally with a whiteboard

This guide will help you:
- Debrief your overall learning as a group
- Examine your challenge through a selected set of lenses (introduced in the last work guide)
- Prepare to develop an innovative insight-driven frame for problem solving in Napa.

You will work together as a team for the first activity, and split into smaller groups for lens work. You can then finish your work together by creating statement starters you will take to the MPAR weekend. If you have time, you may want to start some ideation work before you get there.

Appoint a scribe: Along the way, you should capture "headlines" (as a typed list) as well as photos in the template that you will email to your coach (one submission per team) at the end of your session. A word doc version of the template is available at the main MPAR bCourses site, under the files->resources tab. You will also want to have this with you in Napa.

Appoint a timekeeper: Suggested timing for each exercise is shown.

ACTIVITY 01: GENERAL DEBRIEF AND INSIGHTS IDENTIFICATION

Affinity Diagramming
50 Minutes

You will use an affinity diagram (see the PFPS toolkit for a description of affinity diagramming) to capture the facts and insights your teammates have generated as you debrief.

Figure 1 - Typical Affinity Diagram

1. ***Share:*** Let each person describe their research focus, the work s/he has done and share his/her key facts and insights. If you have not yet captured those facts and insights on post-it notes, do so as you are sharing them (e.g., on Stormboard if you like). As you listen, seek patterns, common themes and interesting perspectives. Give each person a pad of post-its on which s/he can capture any additional thoughts while listening.

2. ***Post and Cluster:*** When you have all shared, place your post-it notes on the wall, clustering them by like topics. Label each cluster with a "newspaper headline" title. The headlines should represent your insights to date. Test them by asking yourselves "why is this interesting?" We often identify needs at the levels of use (explicit need, work to be done, what the solution has to do), usability (how the user accesses, uses the solution), and meaning (the emotional resonance of the solution, the expectations the users have). The most interesting insights around which to build "how might we?" challenges are the meaning-based needs. Strive to identify them.

3. ***Capture the Headlines:*** When you have completed this, have a scribe take a picture of your affinity diagram, and capture your "headlines" in a typed list. (You can use the team research template for this.)

ACTIVITY 02: EXTRACTING ADDITIONAL INSIGHTS - ROUND ONE

40 Minutes

If you are like most groups, your list of headlines may not feel novel or truly insightful. By applying your research to specific "lenses", you may be able to extract pains, unmet needs, or clear strategic opportunity that will aid you in developing new "breakthrough" ideas and creative solutions to your client's challenge.

In this first round, you'll be looking at:

> **a> Customer Insights**
> **b> Orthodoxies**

As always, we would like you to tap into the power of the team, so please break up into two separate smaller groups for this activity.

The following two pages describe the activity for each sub-group in more detail. You'll note a basic exercise that leverages your research and affinity diagramming debrief, and "Advanced Tools" if you are having trouble generating insights or have extra time. Further lens details were provided in guide #2.

You will spend 35-40 Minutes working in your group, and 10-15 minutes summarizing and sharing what you discovered with the entire team. During the summarization piece, add the key finding headlines from these exercises to your list of insights you've collected to date (along with photos). You'll find a spot for the additional insights for each lens in your insight debrief template.

ACTIVITY 02: EXTRACTING ADDITIONAL INSIGHTS - ROUND ONE

GROUP "A" - CUSTOMER INSIGHT TEAM (3-4 team members)

"I Wish" /"I Want" Statements: Starting with your group's affinity diagramming work, start by writing up a few "I wish" or "I want" statements to identify what is missing from your client's customer's life.

Examples:

- "I wish bank accounts weren't so 'permanent' – I am uncertain of my future needs."
- "I want to be able to take care of my routine health needs when I am doing other errands, without an appointment or long wait."

ADVANCED TOOLS (Time Permitting)

There are also two tools that are commonly used to more deeply understand customer and user needs: **customer journey maps** and **customer empathy maps** (both described in the PFPS toolkit). You can select one of them (based on what feels most appropriate to your challenge) and build a map based on your research**.**

Customer Journey Map: captures step by step the experience the customer has around your potential solution. There are many, many examples of journey maps on-line (Such as http://goo.gl/DUPvf3)

Note that some are at a fairly high level of abstraction, and others show more detail. You will have to decide which is most appropriate in your circumstance. The most valuable maps combine a narrative journey with both feelings and a satisfaction scale, which shows where the high and low points are in the customer's experience. See example above (see also for other examples: http://goo.gl/1tcW18)

Customer Empathy Map: Described in detail in *Business Model Generation*, the book used for PFPS. This helps you get to the underlying meaning-based needs of the customers by identifying and understanding how they think and feel in addition to what they simply hear, see, say, and do. In general, this lens allows you to step into the shoes of your potential customer and see the world through his or her eyes. Doing so will help you to both generate and evaluate alternative solutions.


From http://goo.gl/AX7Pif

ACTIVITY 02: EXTRACTING ADDITIONAL INSIGHTS - ROUND ONE

GROUP "B" - ORTHODOXIES TEAM (3-4 team members)

It is good to understand industry orthodoxies because breaking them can be an important source of innovative ideas. Alternatively, being aware of orthodoxies can be important as you might inadvertently break one with your ideas and you should know of the implications of doing so.

ORTHODOXY

Convenience or Taste or Nutrition
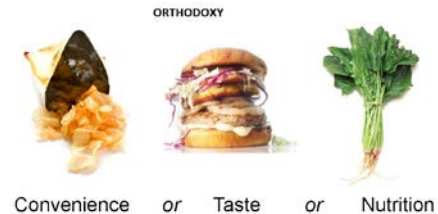
Here are some ways to find industry orthodoxies.

- **Surface dogmas and identify common assumptions:**
    - e.g. "Trading equities had to be done by a broker."
    - "Designer fragrances are just for women."
- **Find the absurdities:** look for things companies do habitually every day that are absurd when seen through the eyes of the customer:
    - e.g., Coat hangers that can't be removed from the rod in hotels
- **Go to extremes:** Take widely accepted industry norms and ask what would happen if we pushed them to a ridiculous limit.
    - e.g. Amazon, Google, Uber
- **Search for the and:** look for situations where the customer faces a trade-off, then think about ways to resolve it.
    - e.g., Toyota: price **and** quality.
    - e.g., Target: price **and** good design

Starting with your group's affinity diagramming work, identify areas where orthodoxies may be keeping good ideas from surfacing.

ADVANCED TOOLS (Time Permitting)

You can also leverage the business model canvas's nine building blocks to uncover additional insights.

1. For key areas (e.g., value proposition), list what the client and its major competitors do today. (e.g., Kaiser "integrated healthcare" vs Blue Shield "choice")
2. Think about other ways to approach the business (e.g., are there other motivators that could be used?)
    a. What do outliers/rule-breakers/unconventional competitors do?
    b. What do companies in other industries do?
    c. Are there other approaches we could use, even if no one does today in this industry?
3. Identify the orthodoxies underlying the existing practices (i.e., why does Kaiser behave the way it does? What keeps it from using an alternative model?)

ACTIVITY 03: EXTRACTING ADDITIONAL INSIGHTS - ROUND TWO
40 Minutes

After you have tackled customer insights and orthodoxies, it's time for a second round of looking at insights though lenses. Again, our purpose is to extract pains, unmet needs, clear strategic opportunity, or other novel insights that will aid you in developing new "breakthrough" ideas and creative solutions to customer problems.

In this second round, you'll be looking at

a> Discontinuities
b> Client and Industry Mapping

We would again like you to break up into two separate smaller groups for this activity. These teams should be different than in the previous round.

The following two pages describe the activity for each sub group in more detail. Once again, you'll note a basic exercise that leverages your research and affinity diagramming debrief, and "Advanced Tools" if you are having trouble generating insights or have extra time. Further lens details were provided in guide #2.

You will spend 35-40 Minutes working in your group, and 15 minutes summarizing and sharing what you discovered with the entire team. During the summarization/sharing piece, add the key finding headlines from these exercises to your list of insights you've collected to date (along with photos). You'll find a spot for the additional insights for each lens in your insight debrief template.

ACTIVITY 03: EXTRACTING ADDITIONAL INSIGHTS - ROUND TWO

GROUP "A" – DISCONTINUITY TEAM (3-4 team members)

You will exploit discontinuities as you generate ideas for your client, and will need to be able to show your client that these discontinuities are on the horizon. Discontinuities are best expressed as a **"from X to Y"** statement. Such as "**from** automobile ownership **to** automobile access" or from "from in house computing capacity to capacity on demand". They are not discreet trends, but rather combinations of trends that enable large-scale shifts.

Start by examining the observations and insights you shared as a group. What directional trends you have you observed? Do any of these lead to a "sea change" that your client should be aware of in the challenge you are assigned?

For example: Trends in "analytics on demand" and "energy management solutions" could lead to **from** discreet analysis of energy efficiency **to** continuous real-time energy grid optimization.

ADVANCED TOOLS (Time Permitting)

Here is an additional set of steps you can undertake to identify discontinuities. You'll diverge in the first step, and then converge in the second one.

1. Identify major trends you see in multiple areas (e.g., technology, regulatory, demographic, economic, geopolitical, work and lifestyle, your client's industry), and make sure they are documented. Write them on post-it notes and place them on the wall.

2. Combine these trends into potential discontinuities, which you can do in multiple ways:
   o Assemble related trends, and look for the implied discontinuity.
   o Start with a trend that is big enough to come close to a discontinuity itself and look for supporting trends.
   o Build potential discontinuities that are creative groupings of trends from different areas, not groupings of somewhat similar trends
   o Notes:
     ▪ If a trend supports several potential discontinuities, duplicate it and include it in each of them.
     ▪ Don't forget to state each potential discontinuity as a "from…to"!

ACTIVITY 03: EXTRACTING ADDITIONAL INSIGHTS - ROUND TWO
GROUP "B" – CLIENT AND INDUSTRY MAPPING TEAM (3-4 team members)

An industry map will help you better understand the dynamics of the industries with which you are working, where your client fits in, and how it relates to the challenge you have been given.

Using your group's affinity diagramming work, focus on identifying existing and potential dimensions of competition in an industry, and where your client (and others) fit in. An example identifying the dimension of competition (in banking) is at right.
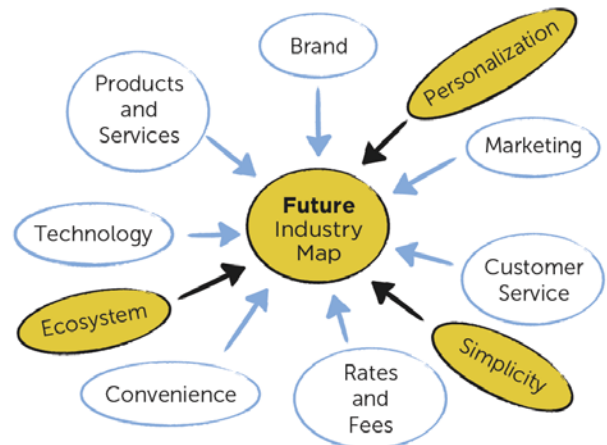

Find a large space (preferably a whiteboard) at which you can work. For about 5 minutes, silently and individually ideate around all of the players you think are relevant, and what makes them competitive (scale, price quality, brand, service, geography, etc) Write them one per post-it note. Think not just of now, but of the future. Place all of your post-its on the whiteboard, clustering duplicate notes.

- For existing dimensions, think of who is competing effectively or how things are done in the industry.
- Try also to identify where your client competes and how they might "double down" in areas where they are effective and competitive.
- Looking at other industries, trends, and unmet customer needs you have uncovered, identify future/new dimension that could be exploited. As an example, a map of payment industry loyalty programs might identify customer only pre-sales as a dimension used heavily, and contract lock-in as something used in the mobile phone industry that might apply to payments in the future.

ADVANCED TOOLS (Time Permitting)

You may wish to draw a systems map that shows who all of the players are in the industry and how they interact with one another. For example, this simple map shows the players in the mobile industry and where they sit in the value chain:
http://www.theorganicstartupbook.com/2012/12/01/origin-of-species-quantifying-businesses/
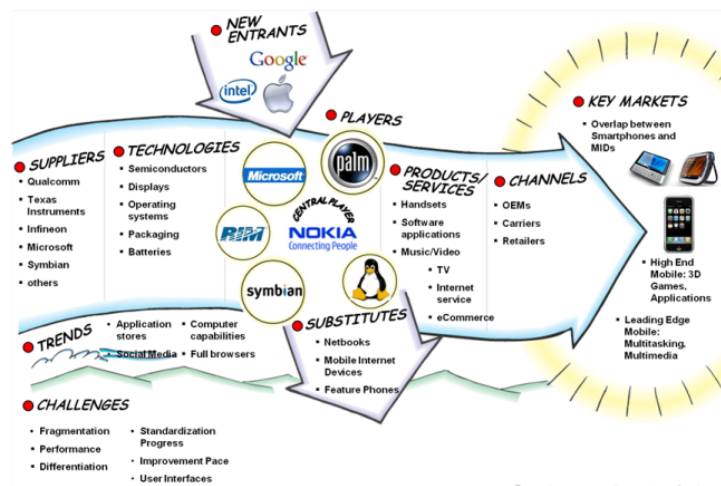
ACTIVITY 04:   CAPTURING WORK AND MOVING FORWARD

20 Minutes

Congratulations! You've now processed the data you have collected. Make sure you have documented your work – both in written headlines and in photos. Please capture this in the template provided (on the following page and on the main bCourses site) and **upload it to the project specific bCourses site for your coach and GSI to review (by 1.13.15).**   *(Format = MPAR2015_Insight debrief _client challenge_team#)*   These insights are the inventory you'll be using in Napa. You can continue to create additional insights by re-clustering, using the advanced tools, and continuing to validate your insights.

Reframing

Your first session in Napa will be to frame/reframe the challenge posed to you based upon what you have learned, so that you can develop more powerful proposed concepts.

Once you have your list -- If time permits -- use dot voting to identify the 6-8 key insights which could lead to interesting problem re-frames. You can also try some reframing.

As an example…if a key insight (Ford team) is that:
> *"Customers still want to own cars, even if they use shared car services"*

…then you might reframe the original challenge statement of:
> *If a new model called the "Ford Share" were developed, what key technology features would make it attractive to the shared car market?*

As…
> *"How might we enable customers' vehicles to be more easily shared or fractionally owned?*

Ideation

You will have time with your team in Napa to do ideation work, but if you are eager to get started and have time after completing your insights work, you may want to spend a little time diving into idea generation.

- Start with one of your reframed statements.
- Let each person silently and individually write down as many ideas as s/he has against that question.
    o   Take about three minutes to do this.
- Then post the ideas on the wall, clustering like ideas.
- Give each cluster a catchy name that captures the essence of those ideas.

If you do not have time, plan to have each person individually generate ideas for each of the team's "how might we?" statements before you see each other in Napa. If each person brings his/her ideas on post-it notes ready to share, you'll be able to jump right in when you get there.

TEAM INSIGHTS DEBRIEF TEMPLATE

Team: _____

General Insights Debrief: List key insights below. Paste a photo (or screenshot) of your affinity diagram as well.
1.   2.   3.   4.   5.   Etc.
Insights Identified via Lens Work   List insights derived, and again paste photos of your work.
Customer Insights
1.   2.   3.   etc.
Orthodoxies
1.   2.   3.   etc.
Discontinuities
1.   2.   3.   etc.
Client and Industry Landscape Mapping
1.   2.   3.   etc.
How Might We? (If time)   List the top five "how might we?" reframes of your challenge that you have identified and will take to Napa.
1.   2.   3.   4.   5.   etc.