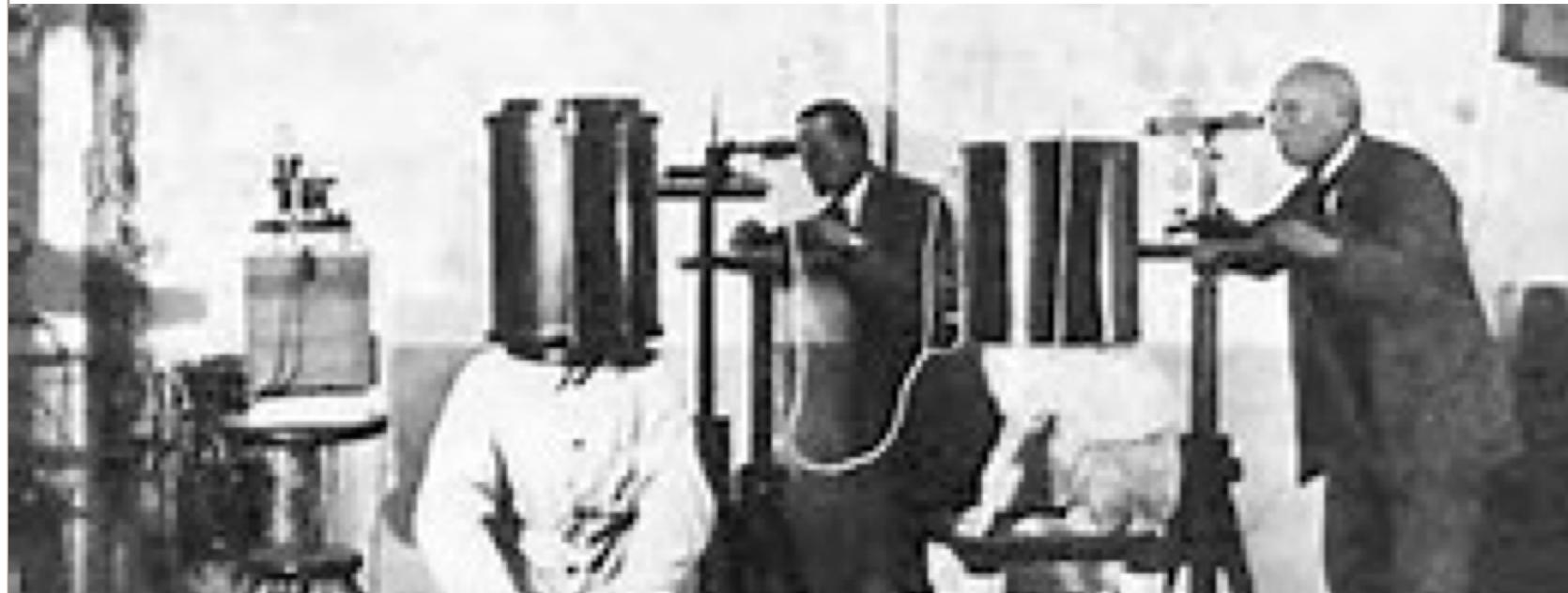


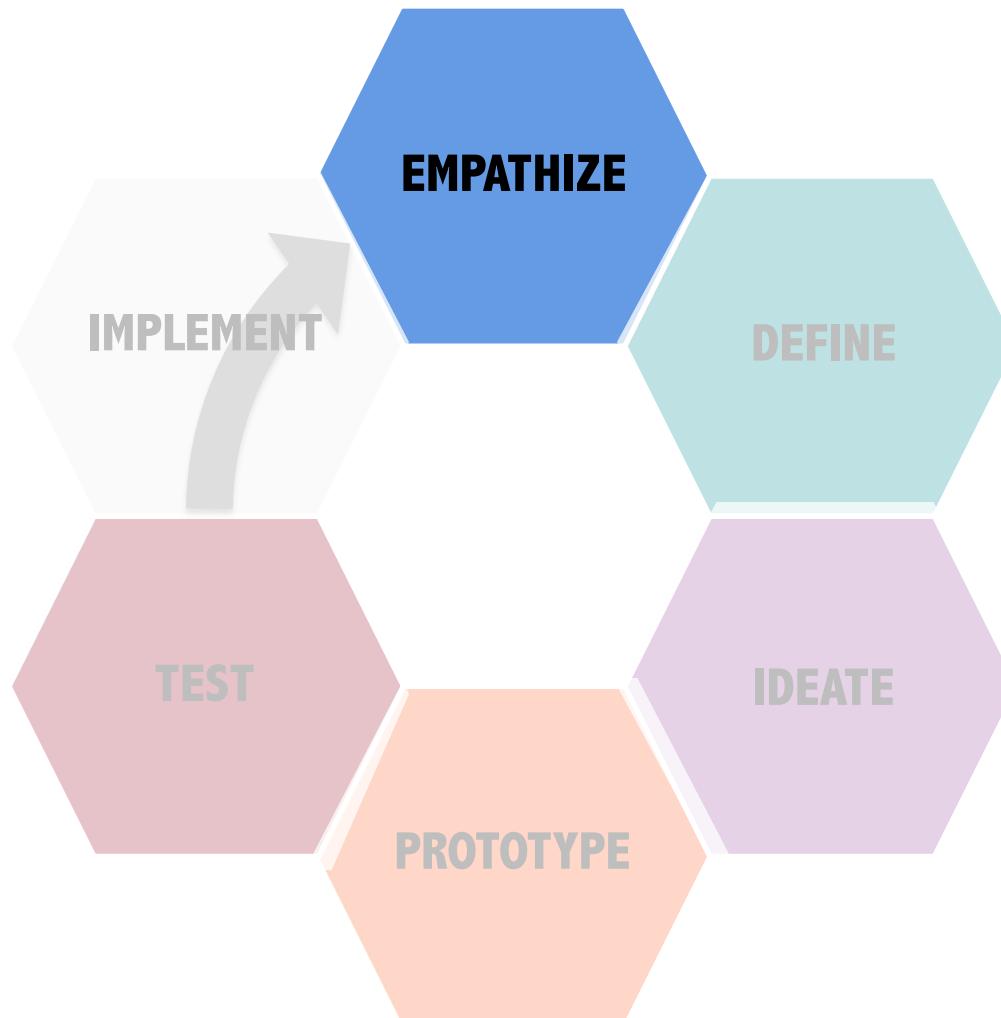
Building Empathy Using Immersive Research Design



Design Thinking for Business Innovation
Stephen Walls, Ph.D.



The University of Texas at Austin
McCombs School of Business



Discussion Objectives

- Discuss methods for gaining deeper insights & how to design good research
- Review pros and cons about each method
- Consider scenarios that are appropriate for each method



Overall Key Points

- Identify the outcomes first – what information do you need to identify the problem(s)
- Establish clear and specific goals for gathering insight – what do you want to know and why?
- Consider designing a first pass of how you will analyze and communicate findings
- Yet, make sure the research design is flexible enough to capture unintended insights
- Think holistically about the research effort and make intentional choices about order & linkages



Establish Clear Objectives

- Avoid gathering insight based solely on, “We need to find out more about segment X.”
- What, specifically, do you want to know about a particular person?
- And, then, what would be the best way to find that out?
- Start cheap & broad (secondary sources, focus group, small pilot) before spending too much time, money, & resources (effective & efficient)



Immersive Research Methods

Qualitative Research

Design Research

Human Factors

Projective Research

Ethnography

Need Finding

Generative Research

Context-Based Research

Immersive Research



Immersive Research Methods

Many of our methods are extensions of

- **ethnography/observation**
- **in-depth interviews**
- **diaries**



Immersive Research

Goal is to uncover key insights

It is intentionally not direct

It is structured, rigorous, & visual

It is not quantitative, but it is still focused pattern recognition



Immersive Research

- **Inspires new ideas**
- **Uncovers latent needs**
- **Focuses on individuals**
- **Happens in natural contexts**
- **Promotes dynamic conversations**
- **Is valuable early in a development process**



Generative Research

- Inspires new ideas
- Uncovers latent needs
- Focuses on individuals
- Happens in natural contexts
- Promotes dynamic conversations
- Is valuable early in a development process

Traditional Market Research

- Improves existing ideas
- Focuses on explicit needs
- Uses market segmentation
- Takes place in controlled settings
- Structures interviews
- Is valuable later on



Establish a Broad Research Focus

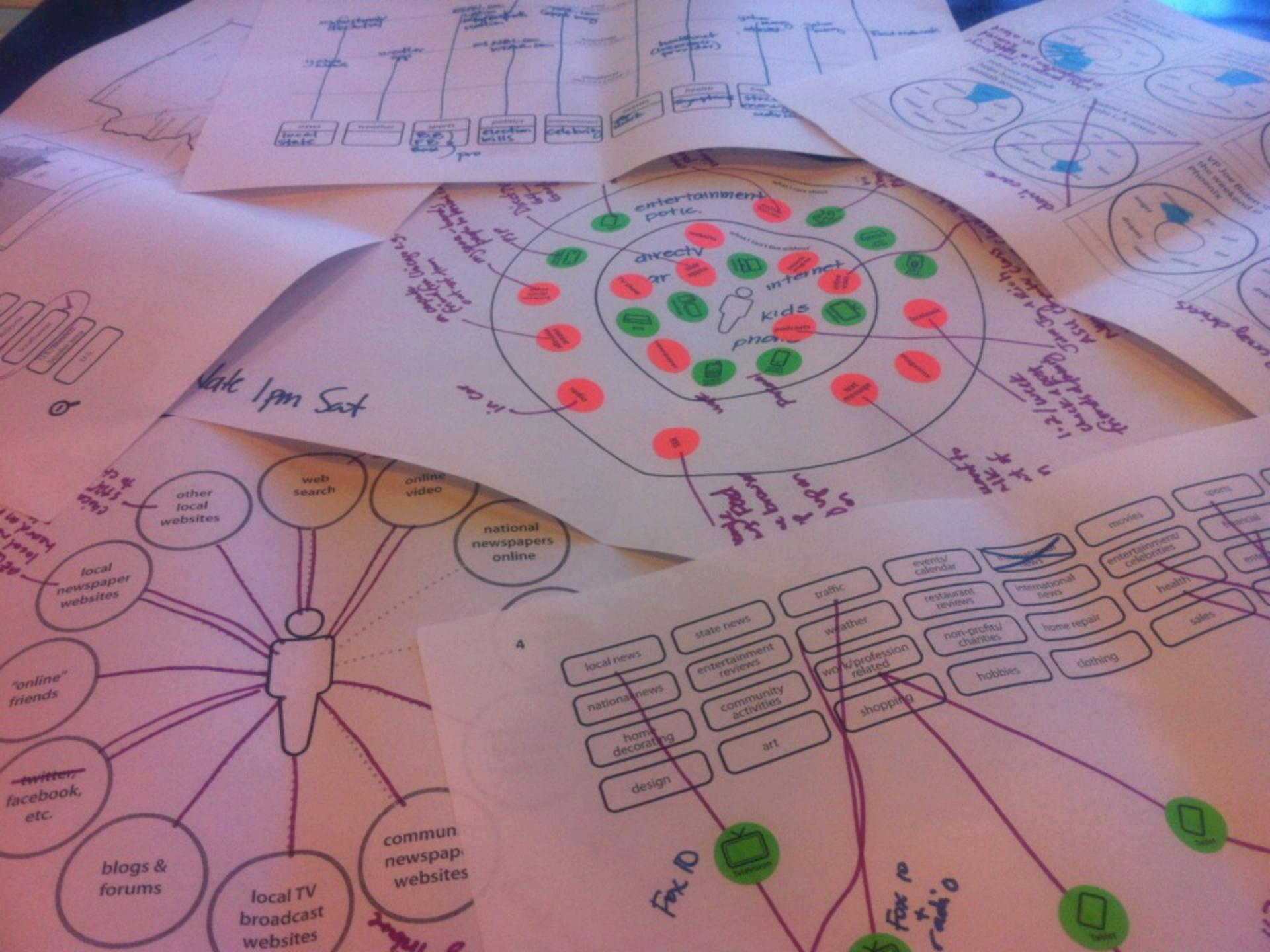
[LOCAL NEWS CONSUMPTION BEHAVIOR]

What is local?

How does local news fit
into people's world?

What is news?





Media Preferences

Category	Source Type	Time Spent (approx.)
news	local news	4.5
weather	local news	3.5
sports	local news	2.5
politics	local news	2.0
info/informed	local news	1.5
entertainment	local news	1.0
music	local news	0.5
events	local free events	1.5
health	local free events	1.0
finance	local free events	1.0
Business	local free events	0.5
Cooking	local free events	0.5

name: Vanessa

Would like to hear about the good and bad things. Example: the heroes of stories, really interesting and shares news that will make the family closer together. It is often important to use simple language during the news so everyone can follow and understand.

Characteristics

- CLASSIC
- INDIVIDUAL
- LOCAL
- CONSERVATIVE
- COMPREHENSIVE
- CAUTIOUS
- LIGHT
- MATURE
- SWIFT
- COURTEOUS
- COMMUNITY
- IN-DEPTH
- PRACTICAL
- COMPLEX
- ACCESSIBLE
- MODERN
- FAMILY
- WORLDLY
- PROGRESSIVE
- SPECIFIC
- ADVENTUROUS
- SERIOUS
- YOUNG
- DELIBERATE
- BRASH
- AUTONOMOUS
- SURFACE
- INTELLECTUAL
- SIMPLE
- EXCLUSIVE

name: Vanessa

"I tried to give up my phone. I lasted two days and it was awful."

Constantly connected and chooses which device to use depending on her location. She is comfortable using all different types of devices and apps to find the information she needs.

Consumes information to be well informed and isn't afraid to share information with others.

media

	high	low
analog		
digital		

Keyword: Constantly Connected

"It's good to hear about the good things too."

She wants to be in the know because she has lived in Arizona her whole life. She likes to feel connected and local news helps her do that. She seeks content to help improve her life and her families. Searches for job opportunities a lot. She is also big into cooking and uses Google to help plan daily meals.

She wishes the news would cover the good in stories and tell how to prevent certain events from happening again or to her family.

Content

Keyword: Good with the Best

"I live by the free way so Phoenix area is my local."

Believes you can get anywhere in Phoenix in 20 minutes and that includes the entire Phoenix area to be her local. But likes to know what is going on with the state of Arizona because she is an Arizona native.

Keyword: City girl

Wants to be in the know because they act like they are a bunch of people real to her and is familiar so she converses to search it regularly.

Keyword: Famously

Getting suggestions from others.

```

graph TD
    Person((Vanessa)) --- Google((Google))
    Person --- OnlineVideo((online video))
    Person --- NationalNewspapers((national newspapers online))
    Person --- NationalMagazines((national magazines online))
    Person --- NationalTV((national TV broadcast websites))
    Person --- CommunityNewspapers((community newspaper websites))
    Person --- SocialTV((social TV providers))
    Person --- BlogsForums((blogs, forums))
    Person --- FacebookTwitter((facebook, twitter, etc.))
    Person --- OnlineFriends((“online” friends))
    Person --- LocalNewspaper((local newspaper websites))
    Person --- OtherLocalWebsites((other local websites))
    Person --- WebSearch((web search))
    
```

4 rules for doing this work well:



1. Get out there.



2. Question your assumptions. (and suspend judgment)



3. Realize today's behaviors predict future behaviors.



4. Value stories as data.*



4 Rules for Doing This Well

- 1. Get out there!**
- 2. Question your assumptions (and suspend judgment)**
- 3. Realize today's behavior predicts future behaviors**
- 4. Value stories as data**



YOUR MISSION

Go out into your setting
and observe.



Observe the AEIOU

- **Activities** are goal-directed sets of actions—paths towards things people want to accomplish. What are the modes people work in, and the specific activities and processes they go through?
- **Environments** include the entire arena where activities take place. What is the character and function of the space overall, of each individual's spaces, and of shared spaces?
- **Interactions** are between a person and someone or something else; they are the building blocks of activities. What is the nature of routine and special interactions between people, between people and objects in their environment, and across distances?|
- **Objects** are building blocks of the environment, key elements sometimes put to complex or unintended uses (thus changing their function, meaning and context). What are the objects and devices people have in their environments and how do they relate to their activities?
- **Users** are the people whose behaviors, preferences, and needs are being observed. Who is there? What are their roles and relationships? What are their values and prejudices?



IMMERSIVE RESEARCH METHODS

HOW TO ELICIT STORIES

Social Media Scan

PROS:

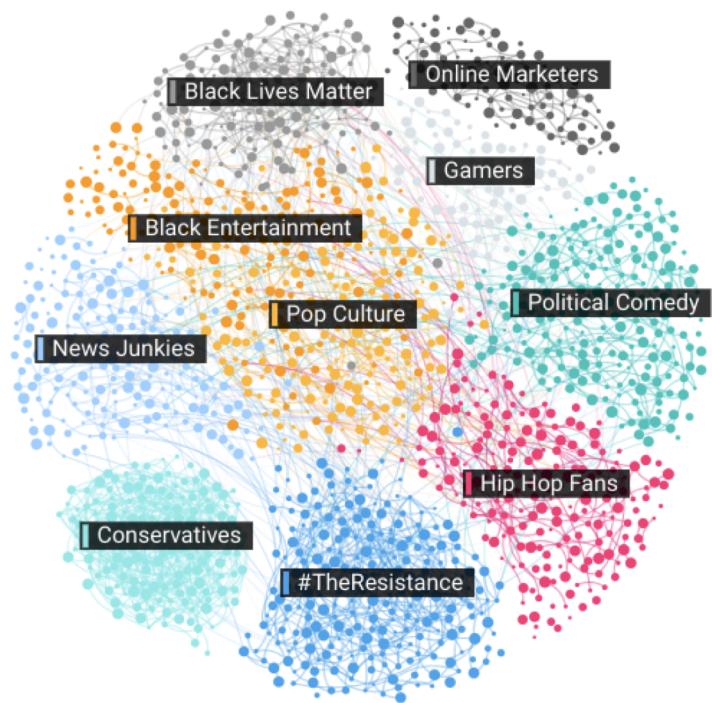
- Great for trends, exploration
- Cheap and quick
- Compelling to deliver as you have the voice of the customer
- Can be easy to target / segment

CONS:

- Lends itself to extremes
- Hard to determine size of patterns
- Mostly only provides feedback on something that exists, not good for creating entirely new solutions
- Risky- easy to do poorly and put too much emphasis on it

HELPFUL HINTS:

- Focus on specific areas to answer
- Avoid the trolls
- Bookmark or copy any content for later reference



Stake outs

Exactly as it sounds. Sit. Watch.

PROS:

- Can be minimally invasive
- Immerses you in customer's world
- Can get to the "why"

CONS:

- People may sense you are observing
- Can be time consuming & expensive
- Not targeted – some processes can't be observed
- Unstructured

HELPFUL HINTS:

- Sketch things if it's helpful
- Look for the impact & the "so what?"
- Switch your vantage point (literally)



Tours/“In-Homes”

Someone hosts you in their space

PROS:

- Immerses you in customer's world
- Can get to the "why"
- Can get to the contradictions

CONS:

- People know you are observing
- Can be time consuming & expensive

HELPFUL HINTS:

- Sketch things if it's helpful
- Look for the impact & the “so what?”
- Switch your vantage point (literally)
- Ask for a tour of everything.
- Be curious with just a touch of nosy.
- You should hear yourself saying “Can you show me?” a lot.



Shop-Alongs

Someone takes you along shopping to someplace connected to the context

PROS:

- Immerses you in customer's world
- Can get to the "why"
- Can get to the contradictions

CONS:

- People know you are observing
- Can be time consuming & expensive

HELPFUL HINTS:

- Have people talk out loud about their thoughts and feelings
- Be curious with just a touch of nosy.
- Hold judgment ; do not offer tips and suggestions
- Try to mimic the person's normal experience as much as possible



Journals/Diary Studies

PROS:

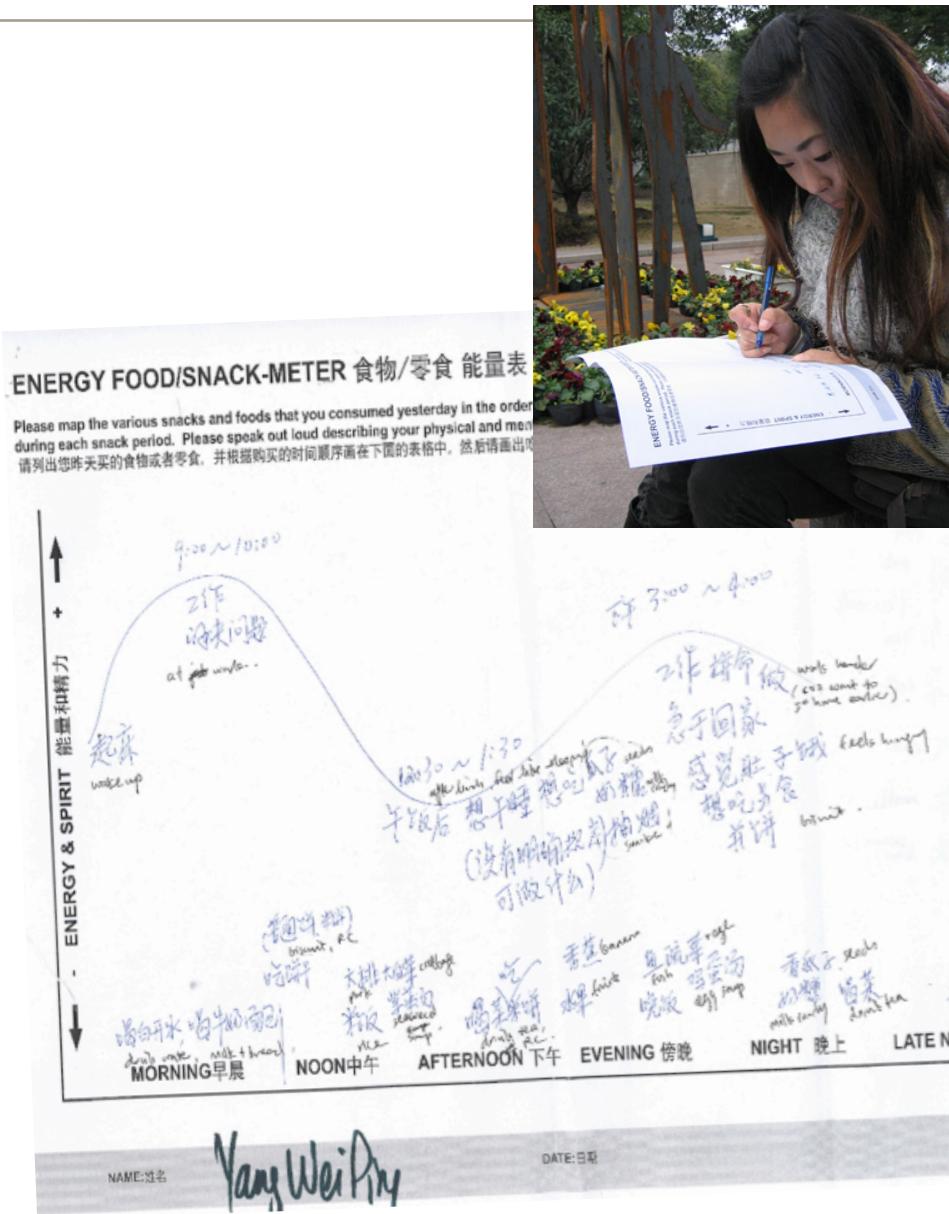
- Very accurate on the “what”
 - Cheap if light touch
 - Can be structured or unstructured
 - Good remote tools - easy to scale globally

CONS:

- Can't ask why
 - Analysis can be difficult for less structured studies
 - 100% participant led – you can't call out unconscious behaviors

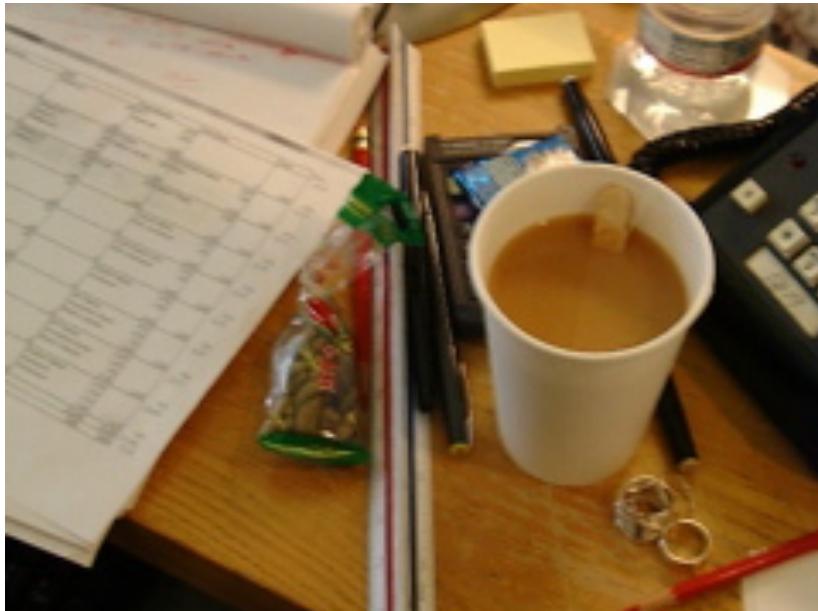
HELPFUL HINTS:

- Consider building in a feedback loop for additional probes
 - Explore how input can be as close to real-time as possible



Photojournals/Photodiaries

See what they see, when you can't be there or can't be there for long.



workplace snacking

Generally same Pros & Cons of other journal/diary activities, except that you get a stronger sense of the what (pro) and some people may stage their photos (con)



hair care

HELPFUL HINTS:

- Consider building in a feedback loop for additional probes
- Explore how input can be as close to real-time as possible
- Be specific about the scenes you want to capture

Walk in Someone's Shoes

PROS:

- Great for empathy and as a starting point to get up to speed
- Cheap and inexpensive
- Effective for pain points
- Great for simple / universal experiences
- Compelling to deliver

CONS:

- Easily biased (you're likely not the customer type)
- Bad with complexity
- Often not possible

HELPFUL HINTS:

- Document your emotions over time
- Keep a diary or scrapbook
- Use photographic documentation break your experience down into steps and stages



Apprenticeships/Demos

PROS:

- Build trust through over time
- Can target parts of the process
- Priorities are participant driven
- Can get the "why" behind the "what"

CONS:

- Have to recruit people
- It's a big time commitment for them
- Can be artificial "best process"
- Can be time consuming and expensive

HELPFUL HINTS:

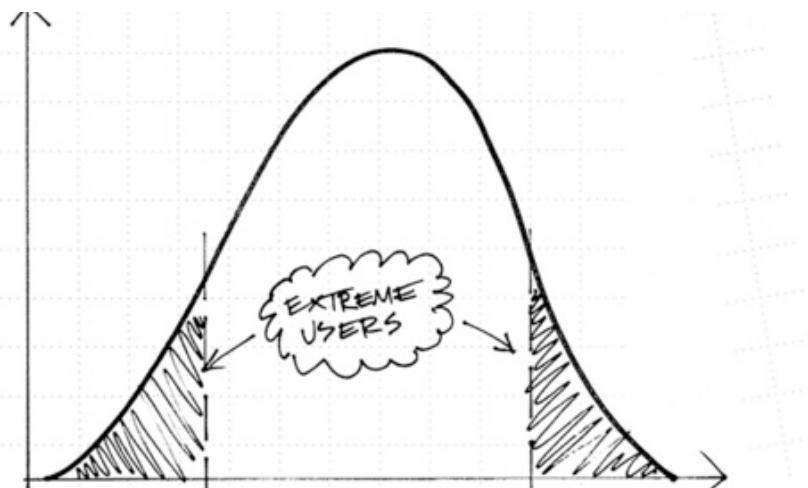
- Ask for an explanation of workflow first, then observe what is actually done differently
- Find "fringe" operators
- Compare newbies with old pros



Extremes

Extreme users will reveal the hard-to-articulate needs of target users.

Don't forget the non-users!



other favorites

- shop-alongs



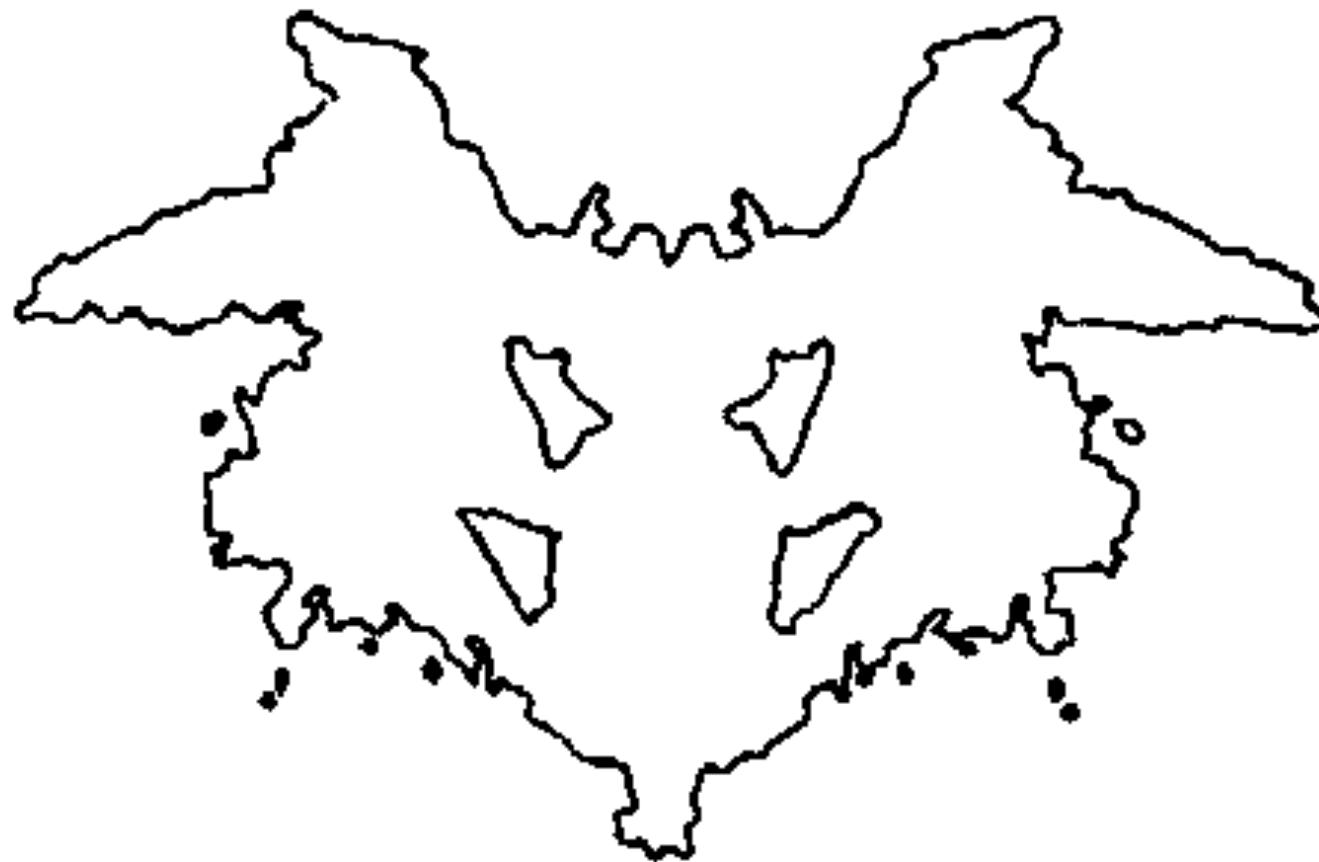
Immersive Research Techniques

■ Projective Techniques

- using ambiguous or incomplete stimulus to uncover true opinions & feelings of consumers when they are unwilling or unable to express themselves accurately
- completion & interpretation tasks (bubble exercise)
- comparison tasks (comparing brands to other things)



Rorschach Test





Projective Tests



Immersive Research Techniques

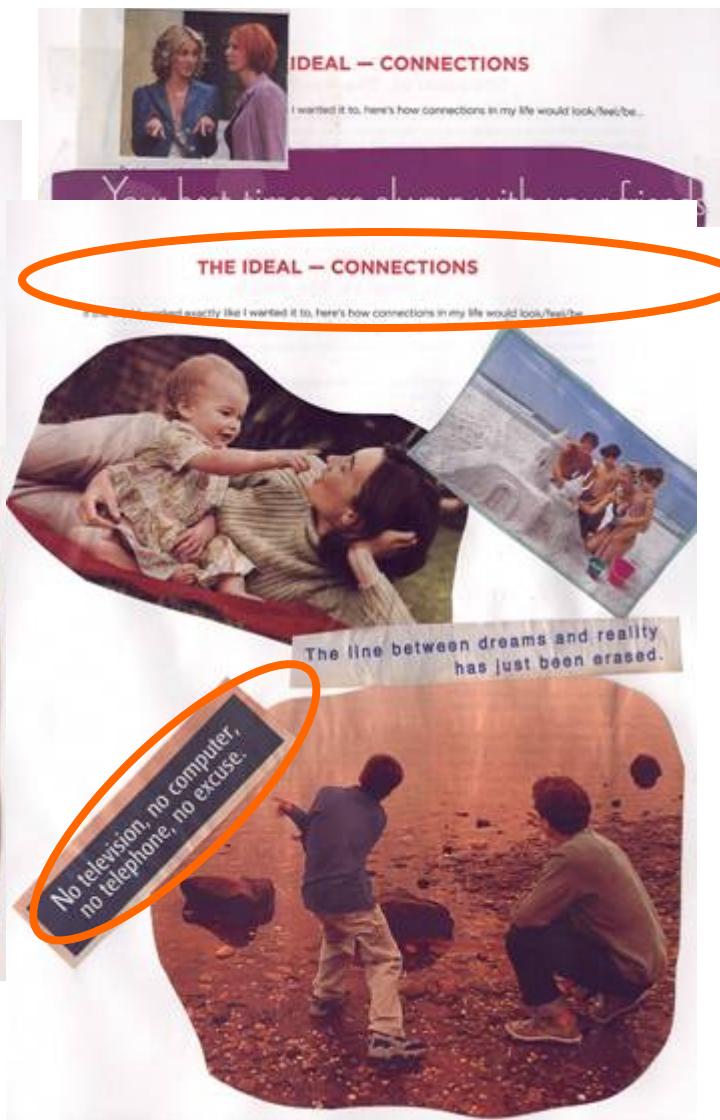
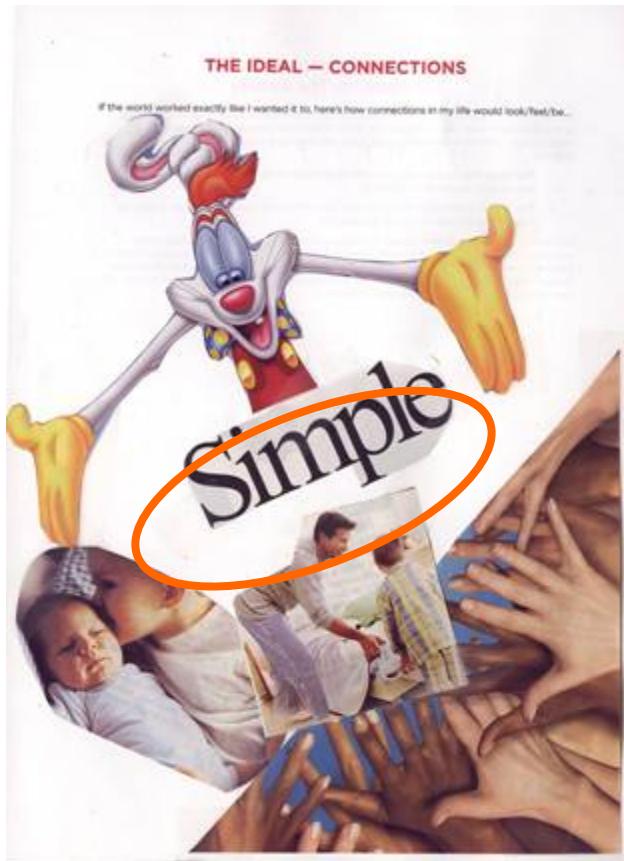
■ Image Collages

- Get a sense of underlying feelings & attitudes
- Should have clear instructions for participants (a defined activity or project – “*Select images that represent your ideal of how it feels to connect with your family.*”)
- For collages, be a little careful with the image library you provide - we generally do not want literal responses





The Ideal Connections



The Reality of Connecting

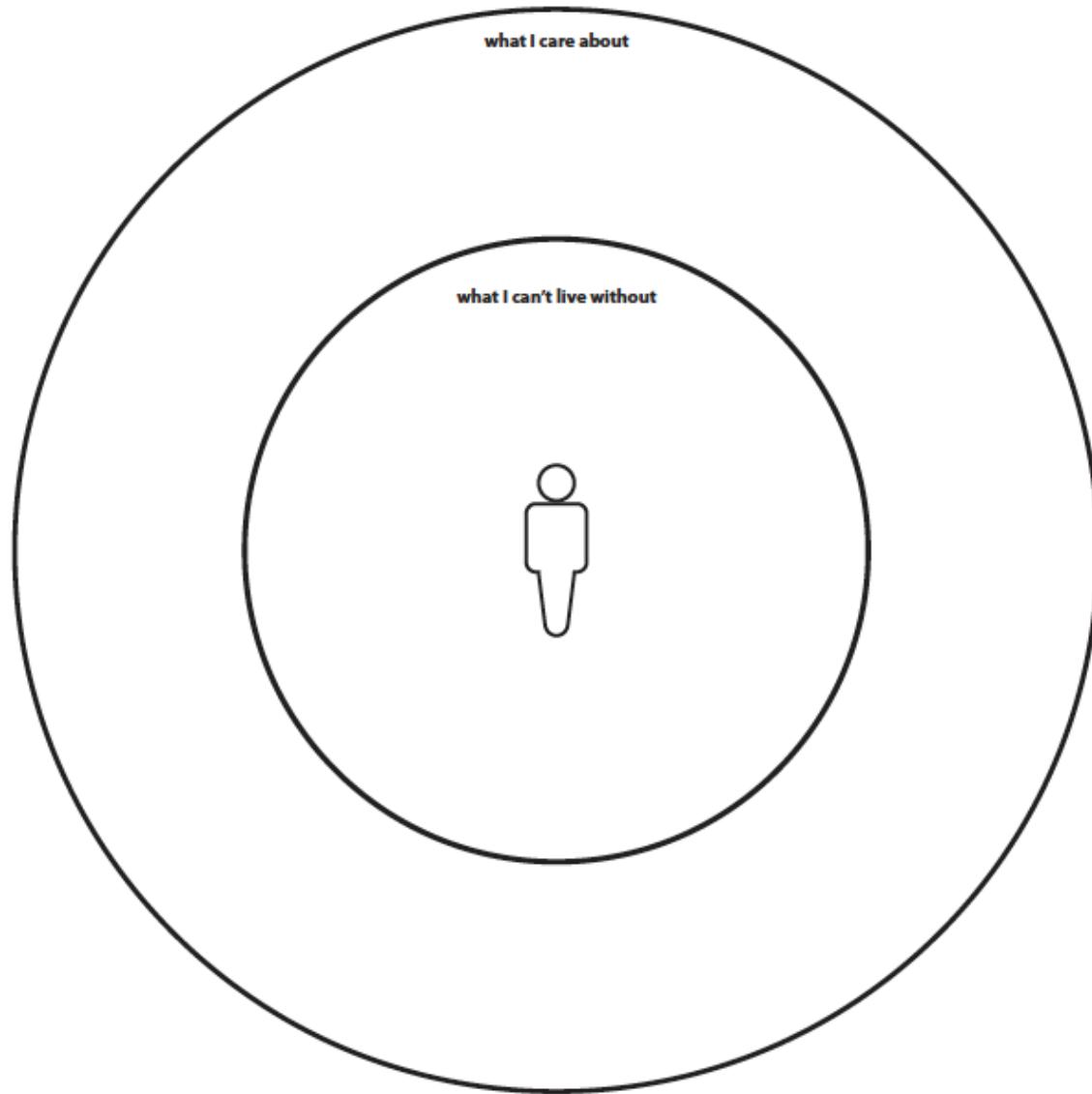


Immersive Research Techniques

■ Generative Research Activities

- Designed to engage participants in activities that address research questions in a more indirect way (i.e., are not direct survey or interview questions)
- Most often produce artifacts that are then translated for insights analysis
- Should be designed with enough structure to guide participants confidently through the activity but allow enough open responses to capture unexpected insights







local news	state news	traffic	events/ calendar	international news	movies	sports	web	showtimes
national news	entertainment reviews	weather	restaurant reviews	international news	entertainment/ celebrities	financial	children	crimes
home decorating	community activities	work/profession related	non-profits/ charities	home repair	health	entertaining	local hero	cooking
design	art	shopping	hobbies	clothing	sales	business	fitness	



IMMERSIVE RESEARCH METHODS

WHAT TO LOOK OUT FOR

Remember: Observe the AEIOU

- **Activities** are goal-directed sets of actions—paths towards things people want to accomplish. What are the modes people work in, and the specific activities and processes they go through?
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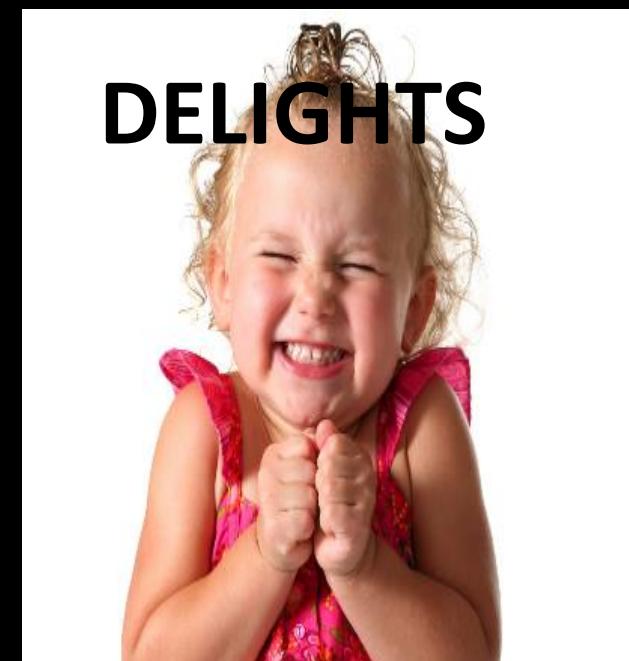
PAINPOINTS



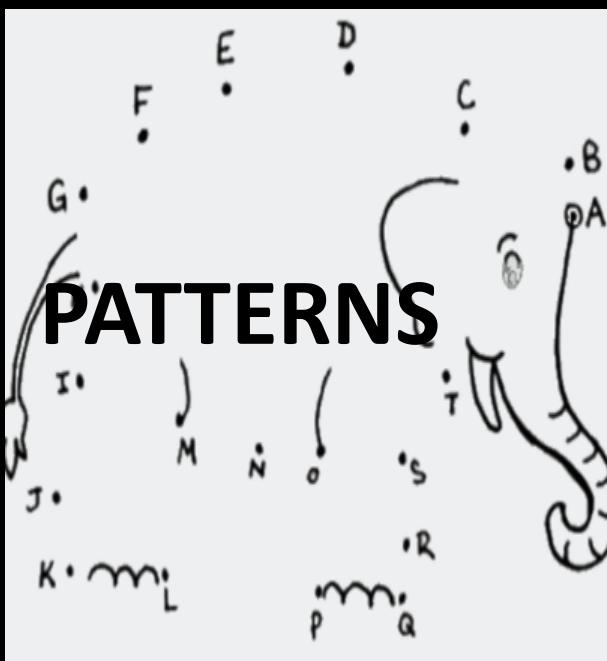
WORK
AROUNDS



UNMET
NEEDS



DELIGHTS



PATTERNS

1. errors that make sense.





2. contradictions



8:00 - 9:00	3:30 - 4:00
9:00 - 10:00	4:00 - 5:00
for your interview, please record everything you eat, drink, or chew, even if a bite of something.	
What & how much consumed	
Orange Cranberry juice	Where
I daily multivitamin	In the kitchen
1 croissant	In the kitchen
1 order of dollar menu French fries (i.e. small)	In the bedroom
12 pieces of cucumber sushi	In the car
	Why
	I drink OJ/Cranberry every morning when I get up
	I take a multivitamin daily in the morning
	I was hungry for breakfast food
	Can't resist the salty French Fries
	It was lunch time
	At the cinema concert with my mom
	I wanted a coffee
	I wanted something to munch on
1 tall iced mocha decaf mocha from starbucks	" "
1 rice crispy square with m & ms from Starbucks	" "
1 bottle of water (5 \$)	" "
1 fresh salad w/ meat, dried cranberries, cheese (medium)	In the living room
2. 1/2 thin pizza toppings with meat, cheese, toppings (large size)	" "
2 pots ramen noodle soup (1 \$)	" "
1 bottle of water (5 \$)	" "
Same as The Second entries	
1 nature Valley trail mix bar	at my desk
1 cup of Pomegranate seed medios	" "
2 shirts & wool jacket with belt	at the office
1 bag of shabu, 1/2 c. vegetables	at my desk
2 sandwiches (2 \$)	" "
1 1/2 ltr bottle of water	" "
1 piece chip cake	" "
	These were break fast
	This is my morning eating routine
	I need protein for a morning boost right after work in the AM
	Lunch time !!
	I don't know why it won't taste hungry than I usual
	I just starting a meal
25	" "



3. unintended usage.







4. body language







5. work-arounds and adaptations







6. behavior prompts







rabbit trail: signage as behavior prompt





rental cars

Next Bus Arriving Within:
2.5 MINUTES

WOMEN
ONLY

Womens



WOMEN

TO USE DISHWASHER

FIRST TURN ON THE COLD WATER FAUCET AND RUN THE GARBAGE DISPOSER.

AT THE SAME TIME UNTIL THE SINK DRAIN IS CLEAR.

THEN SHUT OFF THE COLD WATER AND THE GARBAGE DISPOSER.

THEN TURN ON THE DISHWASHER.

BROKEN

THIS ONE
DOES NOT
GO TO THE
LOBBY.

BUT THAT
ONE DOES.

YES, THIS ONE.

**AND USE THESE
← BUTTONS.**

7. mental models, rituals and what matters to people (the jackpots)







8. Things that makes you go, “hmmmm.”

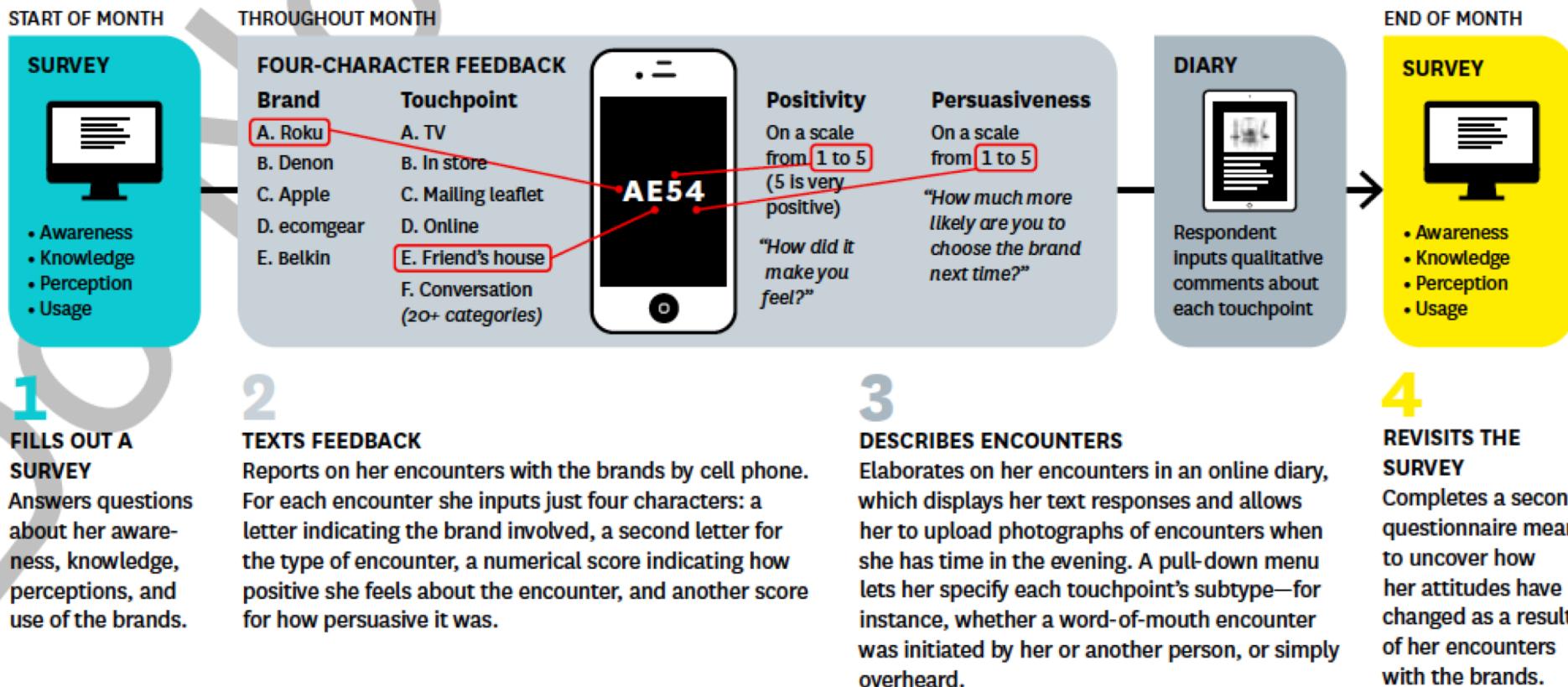






Real-Time Experience Tracking In Action

Home electronics is one sector where companies need to understand how diverse touchpoints add up to a customer's decision to buy. In this typical study (a composite of several projects), a manufacturer asks 500 people to report on their encounters with five home electronics brands over the course of a month. Here's what each participant does:



EMPATHY TIPS

1

BE CURIOUS

Imagine yourself into the hearts and minds of all customers, stakeholders, and your colleagues.

2

BE OPEN

Bringing a child-like openness (or naivety) will allow you to see things through new eyes, without judgement or pre-conceptions.

3

ALLOW OTHERS TO BE THE TEACHER

Your goal is to understand the thoughts, dreams, fears and behaviors of others; and what creates them. There are no right or wrong answers, just their truths.

4

ACTIVELY LISTEN

Don't make assumptions - ask questions.
Dig deeper to get to the "why" - don't just accept the initial answer.

5

EXPAND YOUR CIRCLES OF INTERACTION

Talk to more people to broaden your perspective. Talk to non-customers.
Actively seek people on the fringes to understand their viewpoint – there is inspiration to be had from unusual workflows and workarounds.