

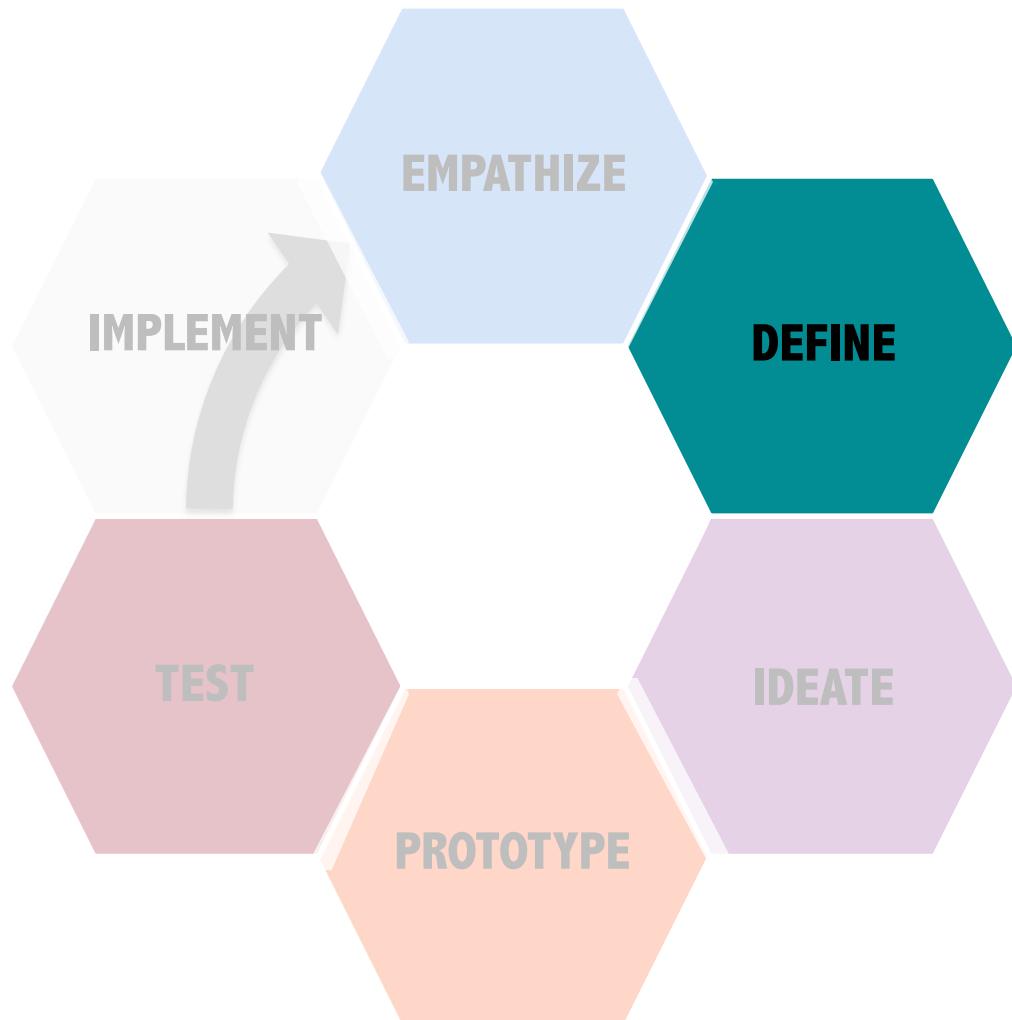
Defining the Challenge Through Analyzing Insights



Design Methods
Stephen Walls, Ph.D.



The University of Texas at Austin
McCombs School of Business



Goal of Analysis & Synthesis

- We want to structure a consolidated representation of the experience.
- We'll be looking at what people have in common and where they differ, and seeing what we can learn from each others' observations and understanding
- Ultimately, we want to clarify the challenges that our personas face so that we can define what the solution we design should achieve to add value



Overall Tips

- **Frame the challenges. Question. Reframe.**
 - When framing challenges, it is important to look at things from many angles, and define in different ways.
- **Bring together diversity in thinking.**
 - Represent multiple disciplines and thinking style in your group overall and in break-out teams.
- **Ensure everyone contributes**
 - Don't let the most extroverted, pushiest, or powerful steal the show or bias the discussion.
- **Retain empathy. Listen, learn, understand.**
 - Take stock and observe what everyone is thinking. Try to get a better understanding of their point of view while also keeping the customer POV front & center.



Capturing Customers' Desired Outcomes

- Stop asking customers what they *want*
- Start asking *what they want your products to do for them*
- Also - *interpret data with a focus on outcomes rather than features*

From “*Turn Customer Input Into Innovation*” - HBR OnPoint Article



Capturing Customers' Desired Outcomes

- **Plan outcome-based customer interviews**
 - Deconstruct the process associated with existing products or experiences
 - Develop questions that address each stage of the process/experience in detail
 - Select groups that directly use the products - include diverse individuals within each group



Capturing Customers' Desired Outcomes

■ Capture desired outcomes

- Translate interviewees' solution statements into outcomes - by asking *why* customers want the stated solutions
- Have interviewees discuss each step in using the product or service - difficulties encountered, ideal scenarios, etc.
- Dive deeper into ambiguous words & phrases, such as “easier,” “more comfortable,” or “reliable”
- Engage in member checking



Capturing Customers' Desired Outcomes

- **Organize the outcomes**
 - Group desired outcomes under each process step
 - Continue to seek creative/novel ways to organize (slice & dice) the data based on various criteria (don't settle with just the first attempt)
 - Consider alternative hypotheses
 - Monitor biases (including inattentional blindness)

<https://www.youtube.com/watch?v=y6qgoM89ek>



Capturing Customers' Desired Outcomes

You can do this quantitatively too

- Rate outcomes' importance & satisfaction
 - Use quantitative approaches to validate qualitative results
 - Quantitative survey respondents rate each outcome's importance & satisfaction level 1 to 10
 - Plug ratings into this formula:
 - Importance + (Importance - Satisfaction) = Opportunity
 - High opportunity values are optimal innovation possibilities: desired outcomes important to customers but not yet satisfied



Capturing Customers' Desired Outcomes

- **Use outcomes to jump-start innovation**
 - Using ratings, identify new product ideas, segment markets, and define your competitive position



Job-Based View of Product Development

- Think in terms of the job to be done, rather than on the product, segment, category
 - person buying a 1/4 inch drill bit is actually buying a 1/4 hole
 - how about the person buying a toothbrush?

From: “Get the Job Done” - Steve Wunker



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Job-Based View of Product Development

- If it is difficult for consumers to get a job done, what are they doing instead (work-arounds)?
- What activities do people undertake now and how can new products or services simplify this process?
- What is driving non-consumption of products & services?

From: “Get the Job Done” - Steve Wunker



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Job-Based View of Product Development

- Once properly framed, a job should be assessed against existing solutions for getting the same job done.
- Look for large gaps between the best way to get the job done and current methods people are using.
- Gap may stem from poor performance, inconvenience, unreliability, etc.

From: “Get the Job Done” - Steve Wunker



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Affinity Clustering

PROS:

- It's very easy to do
- There are no rules to learn; jump right in
- Great for teams, multiple researchers
- It uncovers patterns quickly - which is helpful for large, unstructured data

CONS:

- Can feel chaotic and unstructured
- Individuals may assert biases
- Limited on its own, needs other methods to frame, ladder, and reframe themes or initial problems

HELPFUL HINTS:

- Encourage everyone to think aloud
- Take breaks to challenge clusters



Experience/Journey Mapping

PROS:

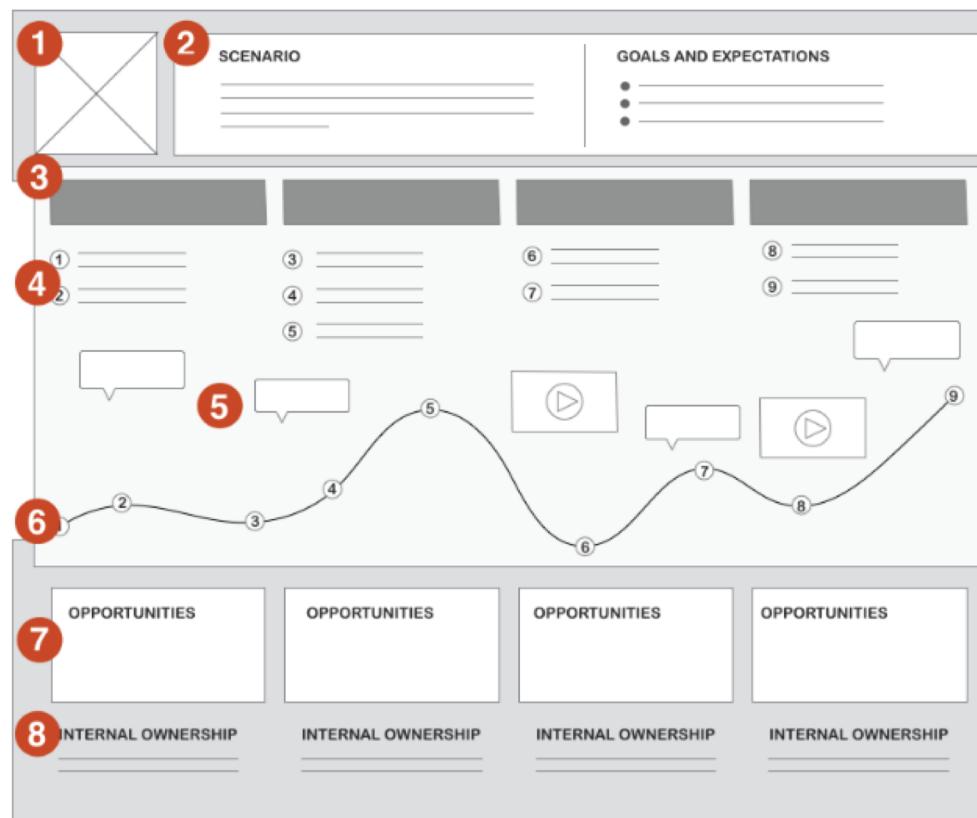
- An effective tool to see the big picture and prioritize a particular stage of an experience to focus on
- Allows for understanding the impact of events over time
- Creates impact at many levels

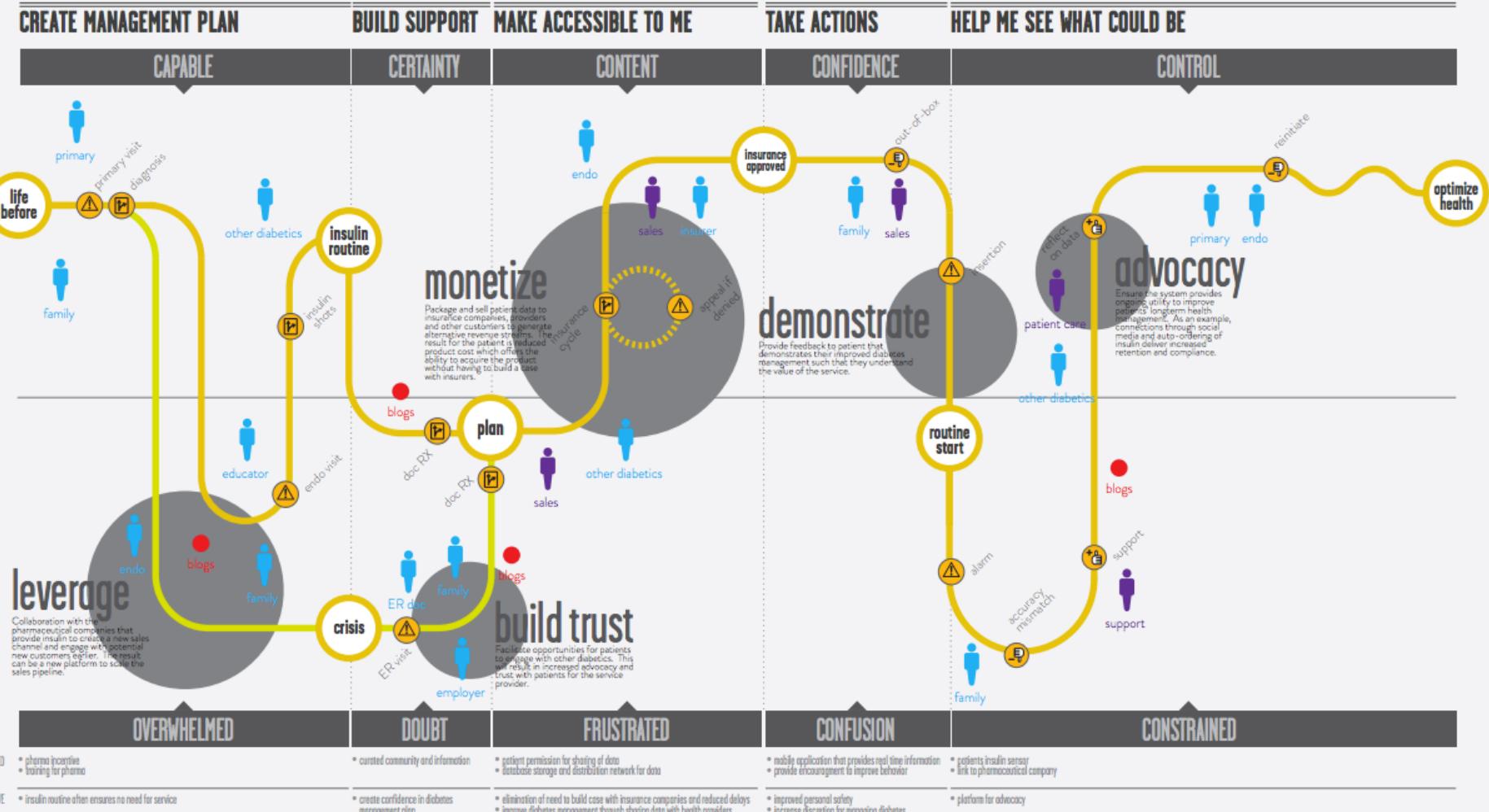
CONS:

- Is more effective when research is structured in the appropriate way to inform the map
- Takes practice to implement

HELPFUL HINTS:

- Clusters activities into "chapters" of the story as the customer may describe them
- Consider how the path through the map will be different for other customers





Service Blueprinting

PROS:

- Can be a powerful tool to engage internal staff of all levels and functions
- Can be used to evaluate existing experiences or as a generative tool to conceptualize new ones

CONS:

- Provides a very functionally driven view of an experience only
- Better for incremental improvements to an existing service than inventing something new from the ground up

HELPFUL HINTS:

- Think how customers' experiences may differ
- Consider the emotional context



Persona Profiling/Updating

PROS:

- Create clear prioritization for requirements for any offering
- A very human-centric method
- Helpful for designing targeted solutions

CONS:

- Is more effective when research is structured in the appropriate way to inform Persona creation
- Can create stereotypes

HELPFUL HINTS:

- Personas are different than segmentation - they are clustered by similarity of need, not demographics
- Think about what kind of details would help describe their personality



Challenge Statements

Start by looking at the problem areas that you have identified. Rephrase them as questions by starting with “How might we”

The ingredients are:

- Target audience
- An outcome
- Metric impacted

Example:

HOW MIGHT WE . . .

minimize the time needed (metric impacted)

by cancer survivors (target audience)

to navigate the financial implications of living with cancer? (outcome)



Laddering Challenge Statements

To LADDER UP (widen scope): ask the question "why?"

HOW MIGHT WE

lessen distracting worries for cancer survivors navigating life with cancer?



HOW MIGHT WE

minimize the time needed by cancer survivors to navigate the financial implications of living with cancer?



To LADDER DOWN (narrow scope): ask the question: "how?"

HOW MIGHT WE

minimize the time needed by cancer survivors to compare the costs of treatment drugs options?



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Sample Problem Statements

Most basic format:

persona + need + insight

(who)

(what)

(why)



Sample Problem Statements

Most basic format:

persona + need + insight

Sandy is a working wife & mom (of two small children) who constantly worries about meeting the expectations of everyone around her

to feel competent and in control of her day &, especially, family activities

she believes that everyone else around her has it all together & manages their lives much more effortlessly than she is able to do



Sample Problem Statements

Most basic format:

persona + need + insight

Phoenix moms
of small
children who
tend to stay
very connected
with friends &
other moms

*to feel like
they are
doing the
very best
for their
children &
family*

**she worries that
she will miss
important &
helpful
information that
will protect or
enrich her
children &
family**



Sample Problem Statements

Most basic format:

persona + need + insight

Tina, a single homeowner in her early 40's, who is not currently dating and is generally frustrated with past boyfriends & dating efforts

regularly maintain & improve her home within her modest budget

she most often seeks assistance from family & friends because she doesn't feel confident about trusting “professionals” but has become more embarrassed about her home over the years



Last Thoughts

- **Evaluating insights takes time**
 - We as individuals and We as organizations need to look at the data, mull it over, sit with it, look at it again, mull it over more... repeat until necessary
- **We should continue to look for inspiration outside of our traditional comfort zone (other segments, other products, other industries, other fields entirely)**
- **We should always listen to our customers, but we should always be wary of the limitations to the kind of data they can provide in the insights process**



Utilizing Definition Synthesis & Prioritization

- 1** Which method for synthesis might be most helpful to re-look at existing customer data?

- 2** Which method for synthesis might be most helpful for your organization to structure future customer research?

- 3** What prioritization criteria would be most relevant?

- 4** What internal stakeholders would you want to have in your sessions? What subject matter experts might have relevant insights?

- 5** Which projects would benefit from laddering the project goals up/down?

