

Discoveries

Look Book



Discovery Planning Template

Problem Statement

Context:	WHO
This causes problems for:	WHAT
because:	WHEN
This is important because:	WHERE
	WHY
	HOW

Discovery goal

Decide if:

Objectives

What do you need to know or have to meet your goal (i.e., to make a decision)?

We need to know:	We need to have:
•	•
•	•
•	•
•	•
•	•

Change statement

We want to change:

In order to:

Desk research: secondary data sources

Review of past user research

What has been done before?
How reliable is it?
Any gaps?

Review of past research

How satisfied are customers?
What are the most common complaints?
When are customers most satisfied / dissatisfied?

Analytics

When does the problem occur?
Are there any potential causal links (proceeding or following events that could be associated?)
How many / how often?

Customer support data

When do customers contact us?
What questions do our customers have?
What are the biggest customer complaints?

Strategy documents, mission statements, or regulation

What's the wider organization's mission?
What strategy do they have in place?
What does the regulation say, and how is it relevant to us?

Heuristic review of existing products or services

Which products or services are we looking at?
Are there any obvious usability problems with the product or service?

Review of other related projects / teams

Who else is working on the problem?
Which problem area are they working on, and why?
What have they done or learnt so far?

Cheat sheet: framing devices

Problem statement

A description of the problem (or opportunity), how it comes about and why it's worth exploring or tackling. Useful as a framing and communication tool to explain why this problem is worth exploring.

Discovery goal

A one-sentence statement of what the aim of the discovery is, usually starting with the word 'decide'.

Discovery objectives

A list of things you must know or have by the end of the discovery, in order to satisfy your end-goal (i.e., make a decision about something).

Change statement

A short statement of what you're looking to change, and what behavior or measure you want to positively impact. Useful to have alongside HMW's.

HMWs

A question used for solution ideation. It is used to frame the solution so that it addresses the problem. Starts with *How Might We...*

Hypotheses

A statement which can be tested, and either rejected or confirmed. Useful to tie ideas of potential solutions to desired outcomes.

Example: cloud back-up software company

Problem statement

A cloud storage back-up company provides yearly subscriptions, however, 60% of users do not renew after the first year, representing a loss of \$2 million.

Discovery goal

Decide what the opportunities are for retaining more customers after the subscription period.

Discovery objectives

We need to know:

- Why customer choose us initially
- Why retained customers decide to renew
- What differences there are in behavior between customers who stay, and customers who leave
- What reasons customers give for leaving
- What the process is when coming up to renewal
- What the subscription options are, and what they offer
- What our competitors offer
- How our back-up service currently works

Change statement

We need to change the way we offer and deliver our product in order to retain customers after the end of the subscription period.

Example findings

Users who leave often use less than 50% of the features available, compared to users who stay, who use over 80% of features.

Users who leave report that the portal is difficult to use
Users often report leaving because of cost, and finding a better deal elsewhere.

HMWs

How might we provide a value for money subscription that users can use efficiently?

Hypotheses

If we improve the usability of the portal, users will be able to discover and use all features, leading to greater satisfaction and higher customer retention. We will know this when we see higher NPS scores from current customers, and a higher proportion of renewals.

Generating How Might We's (HMWs)

Problem:

HMW _____

HMW _____

HMW _____

HMW _____

HMW _____

Checklist:

- ☐ Is it solution agnostic?
- ☐ Does it reflect the problem?
- ☐ Is it broad enough?
- ☐ Is it worded positively?

Example Condensed Discovery Schedule

Activity	Time	Required?
Phase: Kick-off		
Build your working group	1-2 weeks (pre-work)	Required
Root Cause Analysis	2 hours	Required
Write a problem statement	2 hours	Required
Assign roles	1 hour	Required
Set a discovery goal	2 hours	Required
Phase: Research <i>At least 2 of the below are required; 1 of which should be research with real users.</i>		
Review website analytics	4 hours	Optional
Review past research findings	4 hours	Optional
Review customer support data	4 hours	Optional
Conduct stakeholder interviews	1 day	Optional
Conduct field studies / diary studies	1 day	Optional
Conduct user interviews / usability tests	1 day	Optional
Phase: Analyze & Present		
Affinity mapping	4 hours	Required
Write user needs statements	2 hours	Required
Construct personas	1 day	Optional
Create “How Might We” statements	2 hours	Required
Ideate and write Hypotheses	4 hours	Required