USER EXPERIENCE RESEARCH

DISCOVER WHAT CUSTOMERS REALLY WANT

MARTY GAGE AND SPENCER MURRELL

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WILEY

DEDICATED TO . . .

Everyone that has worked at Lextant,
and anyone who has ever wondered how
to conduct user research that inspires
success.

Justine Gage for her instrumental role in
defining and refining this approach for the
last 17 years.

Kim Murrell for her inspiration and
support.

We extend our gratitude to SCAD, the
University for Creative Careers, for its
partnership in the development of a
curriculum and certification program that
forms the basis of this book.

MARTY GAGE
Design Research

SPENCER MURRELL
Insight Translation

c1989

"

In the 80s, when I was in design school, my professors would tell us that half of all new product introductions failed in the market. I think this was intended to inspire us to find better ways of delivering new products to the market. The only advice they could offer at the time was to keep the end user at the center of the design process.

Now, forty years later, the numbers have changed very little. Some estimates suggest that the failure rate today is even higher.

Marty and I have worked together in numerous jobs honing an approach to research that hopes to eventually increase the success rate of new products. Our approach is a blend of art and science that attempts to answer the key questions that every designer asks when embarking on a project: How can I connect the things I design to a positive emotional connection with the end user?

It was not a quick or easy journey, but we are now at a place where we can confidently and repeatedly describe the design of a thing and its role in an experience.

In the following pages we will expose you to our philosophy and processes so that wherever you are in your career, you will be better equipped to succeed.

– Spencer Murrell

CONTENTS

THE DESIGN THINKING PROCESS

We assume that you are familiar with this idea. This book is about the first step in the process, Empathize.

It's important to get this step right, because it is the foundation for everything that follows. You do not want to invest time and resources on ideas that have little to no value with users. Do not shortchange the first step.
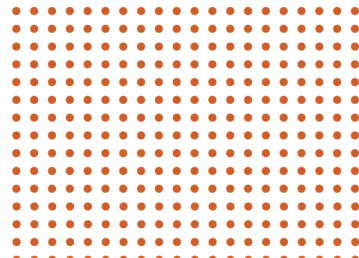
THE DESIGN THINKING MODEL

D.SCHOOL

This five-stage Design Thinking model was initially proposed by the Hasso-Plattner Institute of Design at Stanford (design school). It was developed as a methodology to creatively solve complex problems.

EMPATHIZE

DEFINE

IDEATE

PROTOTYPE

TEST
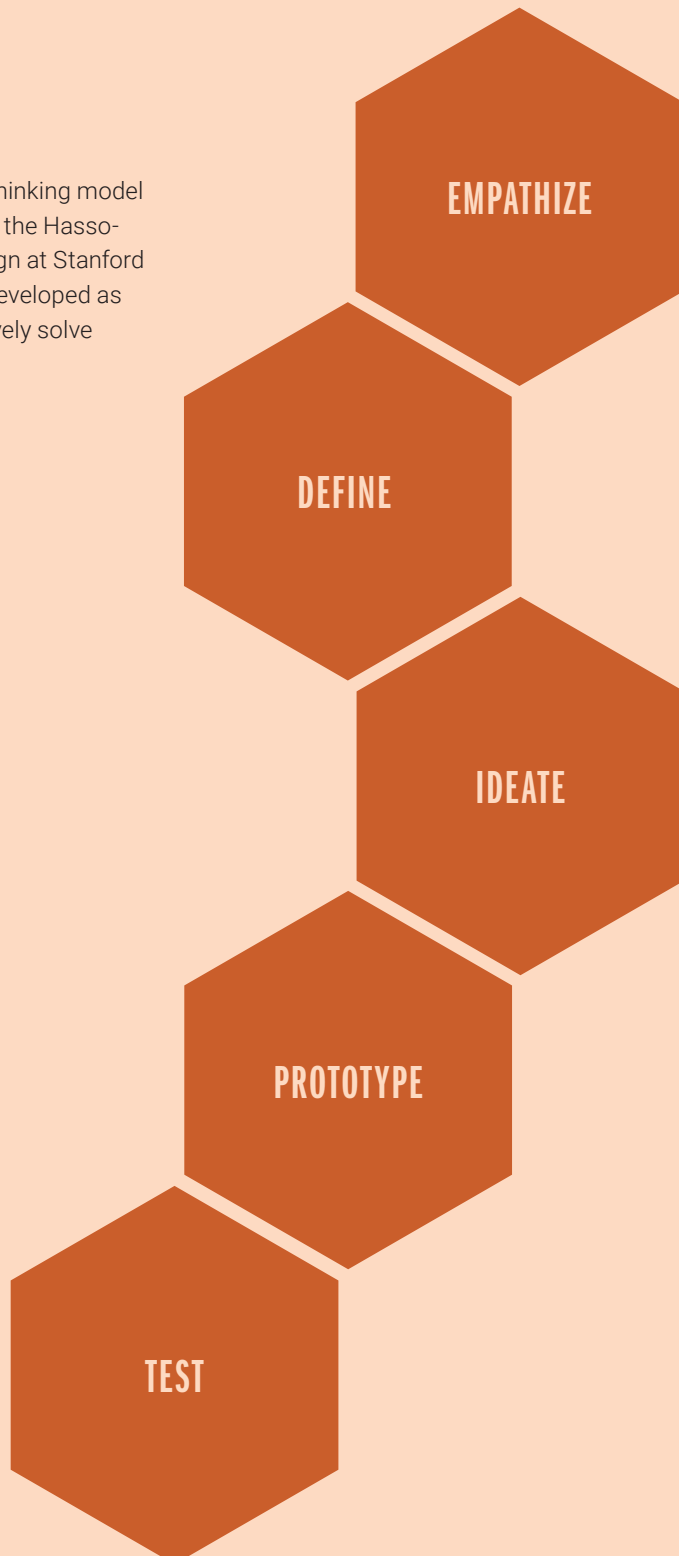
THE SIX KEY PRINCIPLES FOR SUCCESSFUL USER RESEARCH

These principles will help to guide your thinking and the research choices you make.

Ultimately you will be confident that you know what people really want, how to communicate it in a clear and engaging way, align teams around the problem to solve, and provide guardrails for the solution itself.

The principles will be referred to throughout the book.
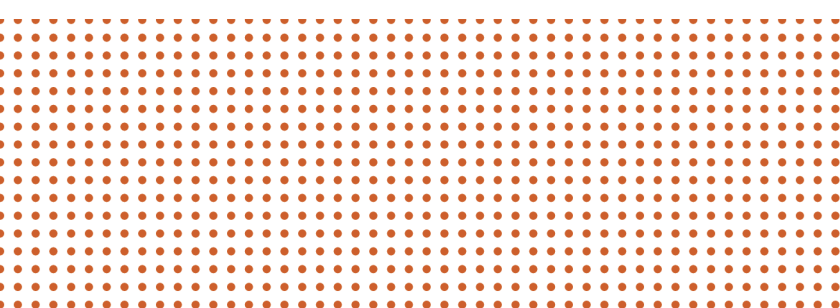
SIX KEY PRINCIPLES

RELEVANT

Grounded in the desired business or social outcomes that are the reason for the design initiative. Learning objectives drive methodological choices.

ASPIRATIONAL

Focuses on understanding people's dreams for the future.

HOLISTIC

Thinks in terms of complete experiences. Connections are made between what needs to be designed and how it makes people feel.

RIGOROUS

Based on truth and reality. Seeks to minimize bias. Utilizes a repeatable process to support identifying patterns in the data. Guessing is eliminated.

ACTIONABLE

Clearly defines the problem to solve. Focuses and inspires creativity in a straightforward way. People know how to use it.

VISUAL

Utilizes imagery for engaging participants, telling the story, and concretely describing the problem to solve.

HOW TO USE THIS BOOK

This book contains all the tools to help practitioners approach the first phase in the Design Thinking process: Empathize. In order to provide this information in a systematic way, each chapter is set up in a consistent format.
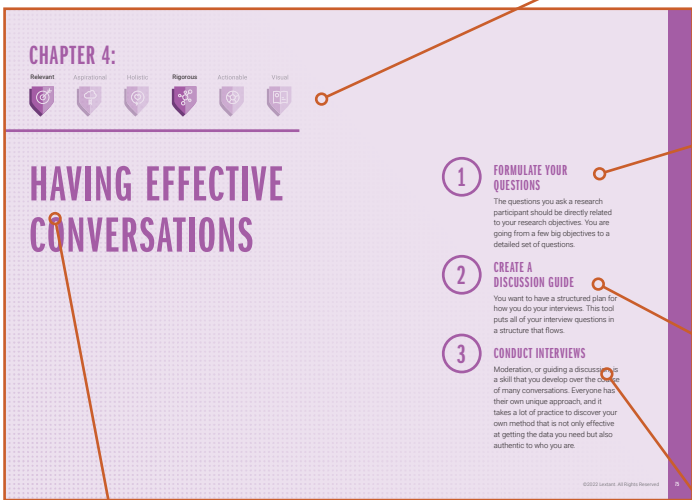
PRINCIPLES

Each chapter includes an indication of which principles are the focus.

THINKING

Section 1 of each chapter explains the thought process behind that chapter.

TOOLS

Section 2 describes the tools used during that chapter.

EXECUTION

Section 3 explains how to execute successfully.

TOPIC

A single chapter covers an individual concept or step in our overall process.

CHAPTER 4:

Relevant   Aspirational   Holistic   **Rigorous**   Actionable   Visual

HAVING EFFECTIVE CONVERSATIONS

1. **FORMULATE YOUR QUESTIONS**
The questions you ask a research participant should be directly related to your research objectives. You are going from a few big objectives to a detailed set of questions.

2. **CREATE A DISCUSSION GUIDE**
You want to have a structured plan for how you do your interviews. This tool puts all of your interview questions in a structure that flows.

3. **CONDUCT INTERVIEWS**
Moderation, or guiding a discussion, is a skill that you develop over the course of many conversations. Everyone has their own unique approach, and it takes a lot of practice to discover your own method that is not only effective at getting the data you need but also authentic to who you are.

CHAPTER 4 REVIEW

1

FORMULATE YOUR QUESTIONS

Make sure that your questions align with your research objectives. Be intentional with your questions. Know where you want to go with the discussion and have a plan. Stick with open-ended questions. Don't bias people by providing your own answer to the question.

2

CREATE A DISCUSSION GUIDE

Use this tool to structure your interview. Make sure your questions have a logical flow that is easy for your participants to follow. Timing is critical, so make sure you address it in your guide. This plan enables you to have a repeatable process, so that later on you can find patterns in your data.

3

CONDUCT INTERVIEWS

Make people feel comfortable. A discussion guide is a plan, not a script, so keep your research objectives in mind as you conduct interviews. Be flexible but consistent in your discussions. Don't bias people. Bring a clock so you can stay on time. Be yourself.

USING THE PRINCIPLES

RELEVANT

The questions you ask must connect to your research objectives. Be intentional.

RIGOROUS

It's easy to "lead the witness." Don't conduct interviews in a way that creates bias. You want to get to the truth.

REVIEW

The end of each chapter includes a review. This provides a summary for each section and the link back to our principles.

WHAT YOU CAN DO NEXT

Train yourself to naturally ask open-ended questions and probing questions. Try practicing using open-ended questions in your daily life and focus on letting others lead you to the next question. Watch people conduct interviews on news and talk shows. Decide if the questions being asked are done in an open-ended way or a leading way.

WHAT NEXT

We conclude the chapter with a few instructions on how to practice these skills and prepare for the next chapter.

MAKING EXPERIENCES ACTIONABLE

1 · A USER-DRIVEN PERSPECTIVE ON DESIGN THINKING

There are many points of view on the design thinking process. You will learn how we think about it.

2 · DEFINING VALUE: WHAT PEOPLE REALLY WANT

For ideas to be successful, other people need to find them valuable. You will learn to do research that helps generate ideas by soliciting the opinions of others.

3 · IDEAL EXPERIENCE RESEARCH

You need to understand what people value in a way that informs your design. The research you conduct should be future-focused, aspirational, and actionable.

A USER-DRIVEN PERSPECTIVE ON DESIGN THINKING

The Design Thinking process is, by its nature, broad and generalized so that it can be applied to any design or business problem.

As we said, this book is about our approach to getting the first step right. However, we have learned from experience that what you learn in the first step must be applied in each subsequent step.

Based upon this requirement we redefined the phases to show how user experience research should be used at each step in the process. Each of these steps could be a book unto itself.
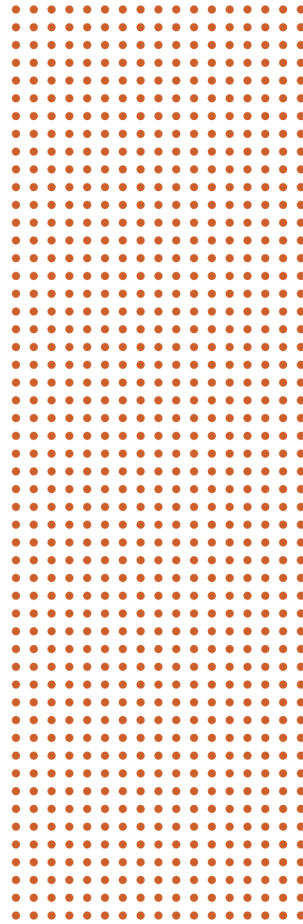
1. DEFINE VALUE

This step is about discovering what people really want. Defining what people value allows you to design something with the potential to deliver a truly meaningful experience.

2. DRIVE ALIGNMENT

First everyone on the team, and all stakeholders, must agree upon what people want. Once this agreement is achieved, they must decide and agree upon what to make. This is the problem your design will work to solve for the user. This is often referred to as a design brief.

3. FOCUS CREATIVITY

You know the experiences that people are seeking. You know what features you need to deliver. If your research was actionable, your ideas should flow.

4. PROTOTYPE EXPERIENCES

You want to embody your idea in a way that clearly communicates to people the experience your design will deliver.

5. MEASURE VALUE

You need to assess how well your design will deliver the experience people are seeking.

DEFINE VALUE
1

DRIVE ALIGNMENT
2

FOCUS CREATIVITY
3

PROTOTYPE EXPERIENCES
4

MEASURE VALUE
5

DEFINING VALUE: WHAT PEOPLE REALLY WANT

Defining value requires a structured process that, when followed, consistently yields success. The following chapters teach you how to make smart choices at each step. The choices you make will be grounded in the six key principles.

DEFINE VALUE

1

DEFINE OBJECTIVES

Clearly outline what goal your design needs to achieve, what you need to learn from users to meet that goal, and the type of deliverable you need to create to communicate what people want. *(see chapter 2 for details)*

DEVELOP AN APPROACH

Describe the people that will buy and use your design. Find and recruit some of these people to be your research participants.

Select the research approach that will deliver on your learning objectives. Develop, test, and refine your research methodology. *(see chapters 3, 4, 5, 6 & 7 for details)*

CONDUCT THE RESEARCH

Implement your research, in a repeatable manner, with your research participants. Capture the data. *(see chapters 4, 5, 6, 7 & 8 for details)*

ANALYZE THE DATA

Identify patterns. Develop themes from these patterns. *(see chapter 9 for details)*

INSIGHT TRANSLATION™

Create a one-page framework that concisely tells the story of what people want.

Embody your research findings in a clear, simple, and inspiring way. *(see chapters 9 & 10 for details)*

IDEAL EXPERIENCE RESEARCH

Ideal experiences are future-focused.
Many research techniques seek to understand the experiences people are having today as a way of providing inspiration for innovation. They rely on the pain points and barriers of today and limit their innovation potential.

Ideal experiences are aspirational.
We believe that innovation should be inspired by people's ideal experiences. People have aspirations for themselves – they dream of a perfect future. These are profound triggers that you can leverage to build strong relationships with customers. Understanding these triggers is crucial.

Ideal experiences are actionable.
We use the Anatomy of Experience Framework to describe experiences as an interrelated series of insights that work together to connect the desired emotions with specific design attributes. This connection allows you to understand how the design of a product or service can make emotional connections with people.

1. EMOTIONS

How does the user want to feel?

"I want to feel in control."

2. BENEFITS

What does the product or service do for the user?

"I am at ease."

I am focused because I don't feel like I'm rushed, holding up other people in line, or imposing on the tellers' time.

3. FEATURES

How is the benefit delivered?

"It is private."

It secludes me so I feel like no one can oversee or overhear my personal business.

4. SENSORY CUES

What are the signals that tell the user that the product or service will deliver?

"It has a secluded location."

It is in its own room, mini rooms, or pod with at least three walls and a door in a separate area of the bank or around the edge of the lobby.

THE ANATOMY OF EXPERIENCE FRAMEWORK

The Anatomy of Experience Framework is a tool we use to describe experiences. It is broken down into four interrelated categories: emotions, benefits, features, and sensory cues. These categories represent the information you need to understand in order to design something meaningful.

Emotions and benefits insights can be used to craft messaging while features and sensory cues insights are useful for design.

MESSAGING:

1. EMOTIONS

How do people want to feel?

Example:
I feel confident that my phone will never fail.

2. BENEFITS

What does your design have to provide in order to make people feel this way?

Example:
My phone will not break.

DESIGN:

3. FEATURES

How does your design deliver the benefits?

Example:
My phone is shockproof.

4. SENSORY CUES

What sensory cues do people associate with these features?

Example:
My phone has rubberized contact surfaces.

1. EMOTIONS

At the core of an experience is the emotional state of the user. Here the emphasis is on how something makes a person feel or how a person wants to feel when interacting with a product or service. These pictures express life or feelings about life. They are metaphorical.

To think emotionally, try completing the statement:

I FEEL . . .

RELAXED

I have no worries. Everything is taken care of.

ACCOMPLISHED

I have the tools I need to set it up so I can have my yay moment when it works.

Other ideal emotion examples include:

I FEEL . . .

Accomplished	Creative
Appreciated	Excited
Attractive	Free to be me
Cared For	In Control
Connected	Loved