Well, we did all this research... Now what?
Some things just take time
Agenda

Introduction
  • Set the context

Synthesis
  • Turning field data into insights

Ideation
  • Turning insights into solutions
Introduction
Portigal Consulting

We help companies discover and act on new insights about their customers and themselves
Typical Development Lifecycle

1. What to make or do?
2. Refine ideas and prototype
3. Iterate and improve
4. Launch
Where We Work

Take a fresh look at people

What to make or do?

Refine ideas and prototype

Launch

Iterate and improve
Where We Work

What to make or do?

Refine ideas and prototype

Use existing ideas as hypotheses

Launch

Iterate and improve
Where We Work

What to make or do?

Refine ideas and prototype

History provides context to explore new opportunities

Iterate and improve

Launch
Synthesis
Turning field data into insights
**Problem:** your client is a leading office supplies brand looking for new opportunities in meeting and collaboration spaces

When you’ve got a moment, take a handful of *brief notes* from your observations of other *people*:

* What tools do you see, and how are people using them?
* What seems to be successful or difficult for them?
* How are they interacting with each other, and with the environment?
Synthesis is Successive Refinement

• First process the **experience** you have collecting data ("in your head") and then the **data itself** ("heavy lifting")
• You’ll go through and refine it
• Then go through *that* and refine it
• Repeat!
Synthesis is Ongoing

- Throughout the data collection process
  - Storytelling and regular debriefs: What did you see? What does it mean?
  - Email out daily summaries
Data In Your Head

• After we are done with fieldwork, we collate our reflections and quickly identify a starter set of **5 to 10 thematic areas**
  – Some of these are right out of the field guide
  – Some of these are new patterns that you observed
  – We may see there’s an interesting area but we don’t understand the details yet
• We deliver this as a **top-line summary**
The Heavy Lifting

• Go back through our raw data closely and pull out anything noteworthy or provocative
  – This could be a pattern of ownership of products, a statement people made, a surprise you heard, a mental model, etc.
• Collaboratively develop and build up patterns, collate, coordinate, and refine
  – Discussing, writing, rewriting, discussing
• We produce a few points that make up a user experience brief

Support an emotional in-control state
Bridge analog and digital
Be tangible/tactile/visual
Connect household members

Sample of a user experience brief
Synthesis Mechanics

- Get field data in **text form**
  - Watch videos and type them up
  - Don’t worry about implications, keep a descriptive voice
    - If you use your own voice, do something typographic to call it out (ALL CAPS, highlight, etc.)
  - Get transcripts (and re-read, or watch ‘em and read)

- Review printouts by yourself and make marginal notes on what seems like a **pattern**, or what seems interesting
  - Ask yourself questions; give something a label; propose a solution
Ian: So does your paycheck come to you and you take it to the bank?

Shannon: Yeah, I'll put some in my savings, and then the rest I -- and I keep those receipts. I keep my bank receipts for a period of time and then I'll store them later on to get a visual.

Ian: So it's nice to have those paper receipts for the visual.

Shannon: Yeah because then I can look back and say -- I'll have in mind that I paid $200.00 to here or $300.00 to here, whatever, and then when I get my bank receipt, I can see concretely what is pending or what is in.

Cory: If you save all your receipts from everywhere then they just end up lying around.

Shannon: That's totally my business, though. For a while you have to save all your receipts because if you're a 1099 you have to save all your receipts. It doesn't matter what it is because you can write some stuff off, so I guess I just keep them and -- I don't know. I just recycle them. The more important stuff, like the bank stuff, I try to keep it for a period of time and then I know I can't keep it any more. As you can see, we don't have very much storage, so that's a problem, too. I think if we had more storage, more filing facilities, I would be able to do a little bit better with the organizational thing.

Ian: Is that something you'd want to do differently?

Shannon: Yeah, I probably would because you get your bill of your cell phone or Comcast, and you don't really look at the bill. You just pay it. I think if I had more time or made more time for myself to do that, I think I probably would for tax reasons just to be more aware of what's coming in and out. I get those bank reconciliations through the mail, and I just don't really even look at those. Not that I have much left over in the bank after that period of time, but I tend to just recycle it.

Ian: So how do you know how much money to put in the savings account and how much to leave in the checking account?

Shannon: I mentally take what would be 20 percent of my paycheck that time, and I try to put 20 percent away every time.

Ian: How did you arrive at 20 percent?

Shannon: For taxes I guess -- I think you have to pay -- or I forget how I came to that conclusion. Something with taxes, I didn't know.

Ian: How long have you been doing it that way?

Shannon: Trying for a year.

Ian: So does it cover the taxes, or you haven't figured that?

Shannon: I forgot what the 20 percent is from.

Ian: No, I mean have you actually hit the end of the year yet and figured out if --
Jon: Well tips on kind of how to kind of manage my credit score. They're actually very good about that. One time I want to learn more about identity theft protection. What I can do to protect myself. Because it's another thing we can... Your credit, if someone gets a hold of your credit card and even though it's established as fraud and everything. It takes a while for you to rebuild it back up. So I look at those kinds of things. Yeah. That's about it. Yahoo has a very good financial site actually. Where they give you tips on investing. And, excuse me. Budgeting and that sort of thing.

Steve: And that's something you've looked at...?

Jon: Yeah.

Steve: Regularly? I mean how does that fit into your...?

Jon: I'd say maybe like once a month.

Steve: Yeah.

Jon: I'll check it out.

Todd: Is it primarily, just reading content, or is there any kind of interactive part of it, when

Jon: There are tools actually. They have interactive tools for budgeting. Calculating mortgage for instance. You can calculate, you know, if I get a 30 year fixed, you know, with this percentage, you know. Or credit cards, you know you can kind of calculate. You can look at, you know, when you're buying your next card and calculate what are my payments going to be. You know, for the next ten years. So...

Steve: And given that your running a budget in Excel, or any of those tools, do they help you?

Jon: Oh yeah. Definitely, definitely. There's a program, or software that my advisor said

Steve: What's that going to do?

Jon: It's basically at a, you can it's very cool actually. So basically you calculate, basically punch in, we'll say October. What my expenses were. And then it'll actually give me like a year outlook kind of down the road. Kind of it I were to cut our here and there. Kind of, it would...

Steve: Kind of calculate what the savings were. I, yeah, he tried to explain it to me, but, mostly it went over my head.

Steve: Is that the kind of thing where, I mean, maybe you don't know, because you haven't started using it yet. Where, because right now your financial information, I'm assuming is on your computer, right? With this software, it's online, or is it, is it a website, or is it...?
Synthesis Mechanics

• Together with team, present each field session as case study
• Using notes, narrate highlights
  – Who is this person, what did they do, what did they use, what problems did they have, what stories did they tell
  – Stick with the high level, set the context
• Bring up the meta-content: "Oh, here's a great quote!"
  – These are seeds for a brainstorm to label the theme
  – Others will add other examples that support or contest those themes
Synthesis Mechanics

- Make sure to follow the structure of getting through each story
  - Maybe putative themes don’t survive, but for now get 'em up on the board
- The first few narratives are slow and rich but eventually you’ll speed up because most everything has been covered
- Clustering!
  - i.e., observations, new models, and design implications
- Writing task to distill brainstorm material into key takeaways
Sample User Experience Briefs

**Project A**
- Support an emotional in-control state
- Bridge analog and digital
- Be tangible/tactile/visual
- Connect household members

**Project B**
- Keep the human touch in communication
- Allow people to move seamlessly between places
- Allow people to integrate seamlessly across different devices and systems

**Project C**
- Enable multitasking
- Enable serendipitous use
- Support events, not just conversation
Synthesis Activity (10 minutes)

• Work with a neighbor or two
• Quickly share your observations
• Find patterns and **group your observations** into *buckets*, for example:
  – Motivations
  – Hardware
  – Breakdowns
  – Learning
• For your best few buckets, produce a sentence with a **point of view**
  – i.e., rewrite ”Organizing Technologies” into “People are rejecting organizing technologies that have a perceived high barrier to usage”
• For each bucket, create a concise statement that describes an **opportunity area**
  – From “People are rejecting organizing technologies that have a perceived high barrier to usage” to “Enable obvious utility in a low-cognitive-load way”
  – Don’t describe *how* this should be done, just what should be done
  – Consider this as summarizing the most crucial unmet needs
Ideation
Turning insights into solutions
 Ideation Process

Findings

User Experience Brief

Ideation Questions

Possible Strategies

Possible Solutions

Objectives

Detailed Solutions

1 2 3 4 5 6 7
Ideation Process

1. Objectives

You’ve already collected these at the beginning of the engagement, but it’s worthwhile to restate, confirm, and evolve here.
Ideation Process

1. Objectives
2. Findings
3. User Experience Brief
4. Ideation Questions
5. Possible Strategies
6. Possible Solutions
7. Detailed Solutions

You’ve just done this
Ideation Process

1. Objectives
2. User Experience Brief
3. Ideation Questions
4. Possible Strategies
5. Possible Solutions
6. Detailed Solutions
7. Findings
Activity: Ideation Questions (1 min.)

- Apply **How can we…?** to each point in your User Experience Brief
  - i.e., rewrite “Enable obvious utility in a low-cognitive-cognitive load manner” as “**How can we** enable obvious utility in a low-cognitive-load way?”
Ideation Process

1. Findings
2. User Experience Brief
3. Ideation Questions
4. Possible Strategies
5. Possible Solutions
6. Detailed Solutions
What kind of solutions?

• Solutions exist across many different business areas
  – Content
  – Functionality
  – Visual design
  – Marketing
  – Services
  – Hardware
  – Software
  – Form factor
  – Packaging
  – Documentation
  – Retail design
  – Partnerships

• Even if you are unlikely to impact certain business areas, it’s crucial that you **set that constraint aside** for ideation
What kind of solutions?

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Activity: Business Areas (2 min.)

- In your group, **brainstorm a list** of possible business areas to design for; think about whatever this business *could* do
- Use this list as a starting point
  - Content
  - Functionality
  - Visual design
  - Marketing
  - Services
  - Hardware
  - Software
  - Form factor
  - Packaging
  - Documentation
  - Retail design
  - Partnerships
Ideation Process

1. Findings
2. User Experience Brief
3. Ideation Questions
4. 
5. Possible Strategies
6. Possible Solutions

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Portigal Consulting
Developing Strategies

• Responses to any particular ideation question can lead in different strategic directions

Finding: People are rejecting organizing technologies that have a perceived high barrier to usage

Ideation Question: How can we enable obvious utility in a low-cognitive-load way?

Support people’s behavior by embracing the finding

Embrace the finding: Leverage visual language of children’s toys

Challenge the finding and change people’s behavior

Challenge the finding: Create learning opportunities to improve cognitive task management
Developing Solutions

Finding: People are rejecting organizing technologies that have a perceived high barrier to usage

Ideation Question: How can we enable obvious utility in a low-cognitive-load way?

Strategies:

Embrace the finding
Leverage visual language of children’s toys

Challenge the finding
Create learning opportunities to improve cognitive task management

Solutions:

Packaging
Use a cartoon mascot

Design
Use primary colors

Packaging
EZ opening

Online
Brain fitness games

Marketing
List-making lessons
Generating Ideas

• Quantity over quality
• Draw or write your idea
• Say your idea out loud
• Listen to the ideas of others
• Build upon their ideas
  • “Yes, and…”

• Remember to generate ideas, not just talk about the data
Getting Unstuck

• Come up with bad ideas
  – Immoral, dangerous, or bad for business

• Oblique Strategies (Eno/Schmidt)
  – iPhone App
  – @Oblique_Chirps
Ideation Activity (X min)

- Take your ideation question and generate strategies and solutions
- Consider the range of possible business areas
- Most ideas will not turn out to be winners, but your goal is to develop a facility in connecting research data to solutions
Thank You!

I’ll be doing the full version of this workshop at EPIC2009 in Chicago on September 1!
Q & A