

understand mixtape

discovering *insights* via *human engagement*

whether you have been working on a project for some time or just starting, a core-principle of design thinking is engaging with real people -- particularly the users and customers of your work. deep understanding of your users leads to new perspectives which, in turn, spawn novel solutions.

take this moment now to (re)engage with your users.

this mixtape will lead you through interviewing and observing users, and then synthesizing your findings to discover meaningful needs and insights.

***understand* mixtape tracklist:**

liner notes:

instructions

side a. / prep for you and your team:

empathizing

assume a beginner's mindset

side b. / in the field:

extreme users

what? | how? | why?

interview for empathy

side c. / synthesis work:

story share-and-capture

user empathy map



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understand mixtape

liner notes. pt. 1

what to do

1. prep: schedule the day and prepare yourself

read through the seven-track mixtape following these instructions. rally your team, and block half a day on your schedules. choose a place to go, or arrange interviewees, to conduct empathy work. consider extreme users. share the first five tracks with your team as pre-reading (empathizing, beginner's mindset, extreme users, what?/how?/why?, and interview).

2. frame: structure the work in a human-centered way

don't just proceed with your project as everyone currently understands it; frame this block of time in a human-centered way, and allow space for exploration that is not bound to a current plan or capability.

for example, say you are planning to build a website to connect workers to small jobs. your research agenda might be: "understand busy people, their days, and how they get stuff done."

3. launch (30 min): get the team prepared and excited

start with a standing warm-up. physically and behaviorally signal to your colleagues they should bring their energy and openness to the day's work. (remember, you are creating an experience for your team, that will help them excel.) then kick off the empathy work. quickly review the plan: where will you go, who will you talk to, and what's the research agenda. remember: you are not looking for the "right" answer, you are looking for inspiration. create pairs and prep interview questions.

4. empathize (120 min): engage with real people

interview and observe. go for stories. everyone should capture notes. take pictures. do not rely on memory.

continued >>

understand mixtape

liner notes, pt. 2

5. unpack (50 min): get the 'data' visually on the wall

in small groups (2-6 people) share what you saw and heard in the field using the “story share-and-capture” method, and populate an “empathy map”. as you work, write down tensions, contradictions, and surprises (TCS) that you notice. do this work at group-scale, using a large wall or whiteboard.

6. needs and insights (50 min): synthesize to find meaning

in the same groups, use your empathy map and the TCS to create a list of insights and list of unexpected needs. get ideas on the board first, and then select and discuss which are fruitful. the goal is to make discoveries which could guide and inspire your project work.

7. wrap (30 min): recap the work, and plan next steps

share top insights with each other. record (type or write) useful needs and insights. discuss how the findings could influence the project. discuss how the day's work felt. celebrate the sprint you just accomplished.

8. going forward:

integrate insights back into your project. consider the *ideate mixtape* to move from insights to solution possibilities.

empathizing

WHAT is empathizing?

Empathy is the foundation of a human-centered design process. To empathize, you:

- **Observe.** View users and their behavior in the context of their lives.
- **Engage.** Interact with and interview users through both scheduled and short 'intercept' encounters.
- **Immerse.** Experience what your user experiences.

WHY empathize?

As a human-centered designer you need to understand the people for whom you are designing. The problems you are trying to solve are rarely your own—they are those of particular users; in order to design for your users, you must build empathy for who they are and what is important to them.

Watching what people do and how they interact with their environment gives you clues about what they think and feel. It helps you to learn about what they need. By watching people you can capture physical manifestations of their experiences, what they do and say. This will allow you to interpret intangible meaning of those experiences in order to uncover insights. These insights will lead you to the innovative solutions. The best solutions come out of the best insights into human behavior. But learning to recognize those insights is harder than you might think. Why? Because our minds automatically filter out a lot of information in ways we aren't even aware of. We need to learn to see things "with a fresh set of eyes" – tools for empathy, along with a human-centered mindset, is what gives us those new eyes.

Engaging with people directly reveals a tremendous amount about the way they think and the values they hold. Sometimes these thoughts and values are not obvious to the people who hold them. A deep engagement can surprise both the designer and the designee by the unanticipated insights that are revealed. The stories that people tell and the things that people say they do—even if they are different from what they actually do—are strong indicators of their deeply held beliefs about the way the world is. Good designs are built on a solid understanding of these kinds of beliefs and values.

Engage to:

- Uncover needs that people have which they may or may not be aware of
- Guide innovation efforts
- Identify the right users to design for
- Discover the emotions that guide behaviors

In addition to speaking with and observing your users, you need to have personal experience in the design space yourself. Find (or create if necessary) experiences to immerse yourself to better understand the situation that your users are in, and for which you are designing.

assume a beginner's mindset



WHY assume a beginner's mindset?

We all carry our experiences, understanding, and expertise with us. These aspects of yourself are incredibly valuable assets to bring to the design challenge – but at the right time, and with intentionality. Your assumptions may be misconceptions and stereotypes, and can restrict the amount of real empathy you can build. Assume a beginner's mindset in order to put aside these biases, so that you can approach a design challenge with fresh eyes.

HOW to assume a beginner's mindset?

Don't judge. Just observe and engage users without the influence of value judgments upon their actions, circumstances, decisions, or “issues.”

Question everything. Question even (and especially) the things you think you already understand. Ask questions to learn about how the user perceives the world. Think about how a 4-year-old asks “Why?” about everything. Follow up an answer to one “why” with a second “why.”

Be truly curious. Strive to assume a posture of wonder and curiosity, especially in circumstances that seem either familiar or uncomfortable.

Find patterns. Look for interesting threads and themes that emerge across interactions with users.

Listen. Really. Lose your agenda and let the scene soak into your psyche. Absorb what users say to you, and how they say it, without thinking about the next thing you're going to say.

extreme users



WHY engage with extreme users?

Designers engage with users (people!) to understand their needs and gain insights about their lives. We also draw inspiration from their work-arounds and frameworks. When you speak with and observe extreme users, the needs are amplified and their work-arounds are often more notable. This helps you pull out meaningful needs that may not pop when engaging with the middle of the bell curve. However, the needs that are uncovered through extreme users are often also needs of a wider population.

HOW to engage with extreme users?

Determine who's extreme

Determining who is an extreme user starts with considering what aspect of your design challenge you want to explore to an extreme. List a number of facets to explore within your design space. Then think of people who may be extreme in those facets. For example, if you are redesigning the grocery store shopping experience you might consider the following aspects: how groceries are gathered, how payment is made, how purchase choices are made, how people get their groceries home, etc. Then to consider the aspect of gathering groceries, for example, you might talk to professional shoppers, someone who uses a shopping cart to gather recyclables (and thus overloads the cart), product pullers for online buyers, people who bring their kids shopping with them, or someone who doesn't go to grocery stores.

Engage

Observe and interview your extreme user as you would other folks. Look for work-arounds (or other extreme behaviors) that can serve as inspiration and uncover insights.

Look at the extreme in all of us

Look to extreme users for inspiration and to spur wild ideas. Then work to understand what resonates with the primary users you are designing for.

what? | how? | why?

concrete		emotional	
WHAT (what are they doing in the photo?)		HOW (how are they doing it?)	WHY (why are they doing it this way? Take a guess!)
-little girl picking root vegetables		-she's smiling, even though it looks bigger than her, it looks fun	-somehow it's been made into a game...gardening is fun...getting messy is fun to her?
			

WHY use What? | How? | Why?

What? | How? | Why? is a tool that can help you drive to deeper levels of observation. This simple scaffolding allows you to move from concrete observations of a particular situation to the more abstract emotions and motives that are at play in that situation. This is a particularly powerful technique to leverage when analyzing photos that your team has taken into the field, both for synthesis purposes, and to direct your team to future areas of needfinding.

HOW to use What? | How? | Why?

Set-up: Divide a sheet into three sections: What?, How?, and Why?

Start with concrete observations (What):

What is the person you're observing doing in a particular situation or photograph? Notice and write down the details. Try to be objective and don't make assumptions in this first part.

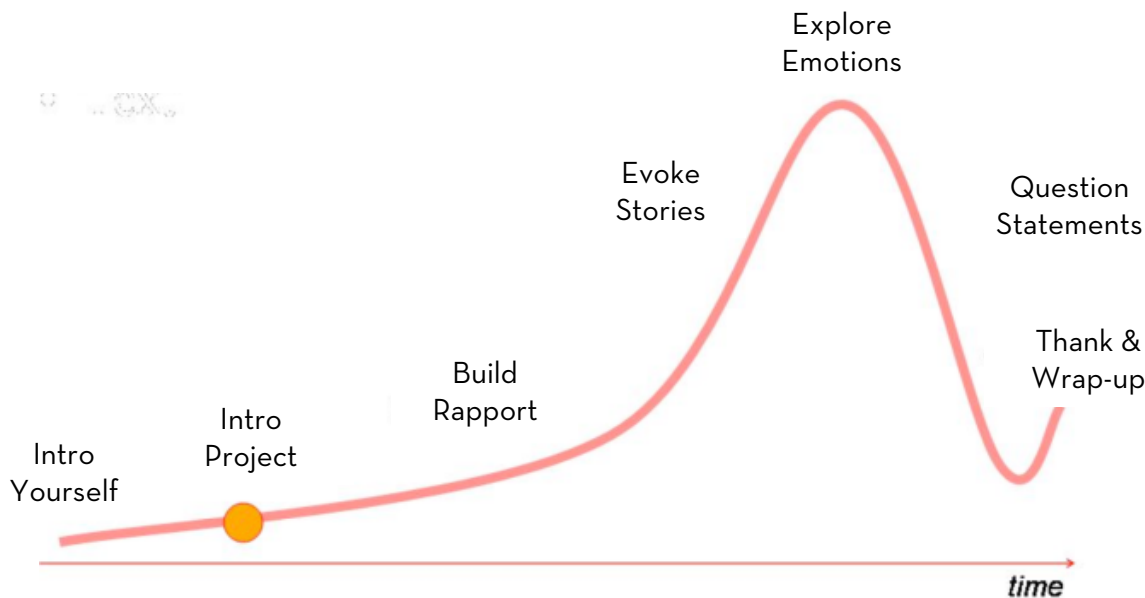
Move to understanding (How):

How is the person you're observing doing what they are doing? Does it require effort? Do they appear rushed? Pained? Does the activity or situation appear to be impacting the user's state of being either positively or negatively? Use descriptive phrases packed with adjectives.

Step out on a limb of interpretation (Why):

Why is the person you're observing doing what they're doing, and in the particular way that they are doing it? This step usually requires that you make informed guesses regarding motivation and emotions. Step out on a limb in order to project meaning into the situation that you have been observing. This step will reveal assumptions that you should test with users, and often uncovers unexpected realizations about a particular situation.

interview for empathy



WHY interview for empathy?

You want to understand a person's thoughts, emotions, and motivations, so that you can determine how to innovate for him or her. By understanding the choices that person makes and the behaviors that person engages in, you can identify their needs, and design to meet those needs.

HOW to interview for empathy?

Ask why. Even when you think you know the answer, ask people why they do or say things. The answers will sometimes surprise you. A conversation started from one question should go on as long as it needs to.

Never say “usually” when asking a question. Instead, ask about a specific instance or occurrence, such as “tell me about the last time you _____”

Encourage stories. Whether or not the stories people tell are true, they reveal how they think about the world. Ask questions that get people telling stories.

Look for inconsistencies. Sometimes what people say and what they do are different. These inconsistencies often hide interesting insights.

Pay attention to nonverbal cues. Be aware of body language and emotions.

Don't be afraid of silence. Interviewers often feel the need to ask another question when there is a pause. If you allow for silence, a person can reflect on what they've just said and may reveal something deeper.

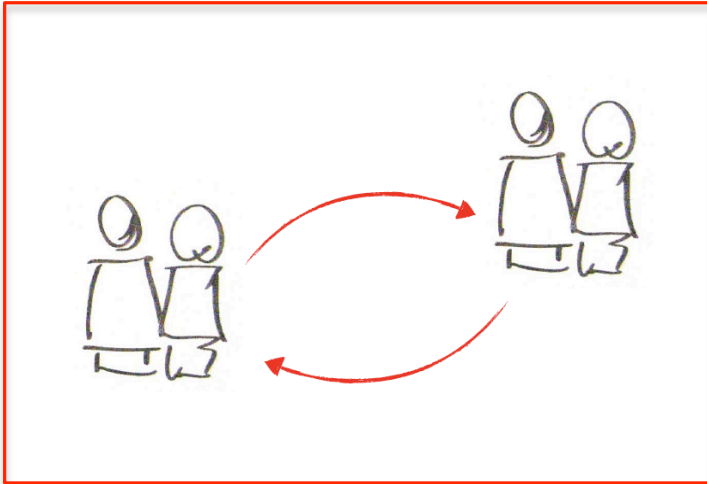
Don't suggest answers to your questions. Even if they pause before answering, don't help them by suggesting an answer. This can unintentionally get people to say things that agree with your expectations.

Ask questions neutrally. “What do you think about buying gifts for your spouse?” is a better question than “Don't you think shopping is great?” because the first question doesn't imply that there is a right answer.

Don't ask binary questions. Binary questions can be answered in a word; you want to host a conversation built upon stories.

Make sure you're prepared to capture. Always interview in pairs. If this is not possible, you should use a voice recorder—it is impossible to properly engage a user and take detailed notes at the same time.

story share-and-capture



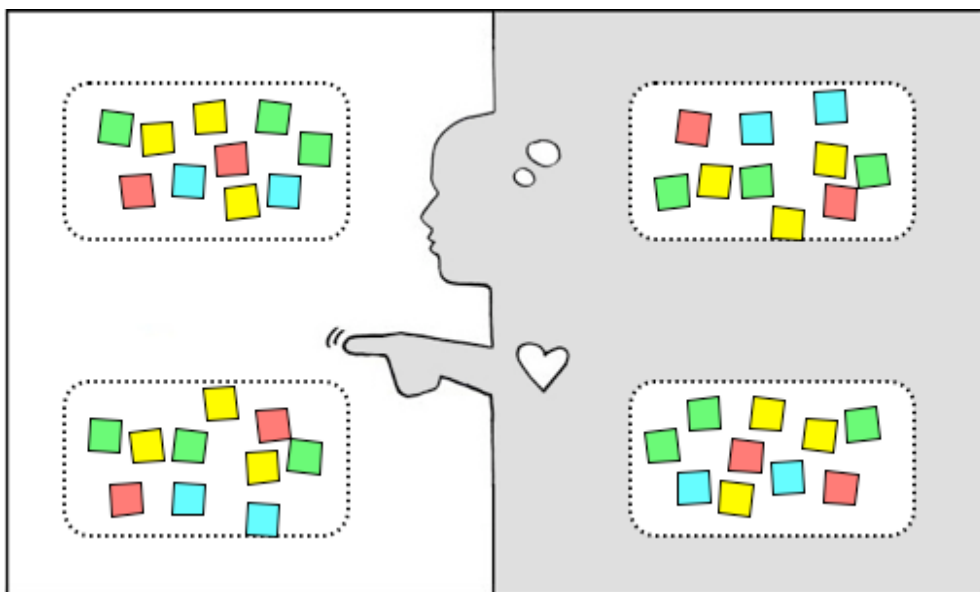
WHY story share-and-capture?

A team share serves at least three purposes. First, it allows team members to come up to speed about what different people saw and heard in the field. Even if all the team members were present for the same fieldwork, comparing how each experienced it is valuable. Second, in listening and probing for more information, team members can draw out more nuance and meaning from the experience than you may have initially realized. This starts the synthesis process. Third, in capturing each interesting detail of the fieldwork, you begin the space saturation process.

HOW to story share-and-capture?

Unpack observations and air all the stories that stick out to you about what you saw and heard during your empathy fieldwork. Each member in the group should tell user stories and share notes while other members headline quotes, surprises, and other interesting bits – one headline per post-it. These post-its become part of the team's space saturation, and can also be physically grouped to illuminate theme and patterns that emerge. The end goal is to understand what is really going on with each user. Discover who that person is and what that person needs in regard to your problem space.

user empathy map



WHY use an empathy map?

Good design is grounded in a deep understanding of the person for whom you are designing. Designers have many techniques for developing this sort of empathy. An Empathy Map is one tool to help you synthesize your observations and draw out unexpected insights.

HOW to use an empathy map?

UNPACK: Create a four quadrant layout on paper or a whiteboard. Populate the map by taking note of the following four traits of your user as you review your notes, audio, and video from your fieldwork:

SAY: What are some quotes and defining words your user said?

DO: What actions and behaviors did you notice?

THINK: What might your user be thinking? What does this tell you about his or her beliefs?

FEEL: What emotions might your subject be feeling?

Note that thoughts/beliefs and feelings/emotions cannot be observed directly. They must be inferred by paying careful attention to various clues. Pay attention to body language, tone, and choice of words.

IDENTIFY NEEDS: “Needs” are human emotional or physical necessities. Needs help define your design challenge. Remember: Needs are *verbs* (activities and desires with which your user could use help), not *nouns* (solutions). Identify needs directly out of the user traits you noted, or from contradictions between two traits – such as a disconnect between what she says and what she does. Write down needs on the side of your Empathy Map.

IDENTIFY INSIGHTS: An “Insight” is a remarkable realization that you could leverage to better respond to a design challenge. Insights often grow from contradictions between two user attributes (either within a quadrant or from two different quadrants) or from asking yourself “Why?” when you notice strange behavior. Write down potential insights on the side of your Empathy Map. One way to identify the seeds of insights is to capture “tensions”, “contradictions”, and “surprises” as you work.