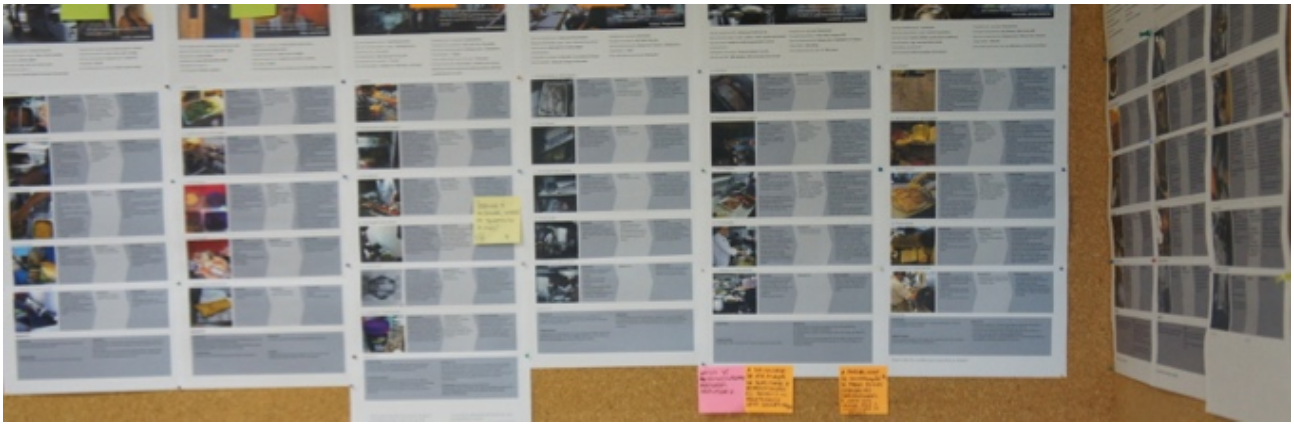


Analytical debriefs

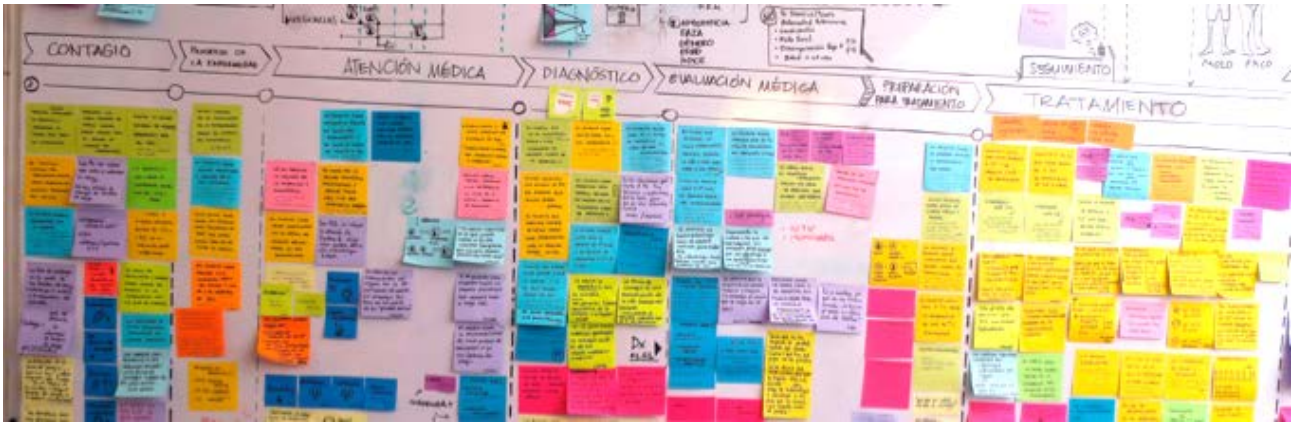
Documents that visually and textually synthesize the main impressions of what was seen and heard in each fieldwork interaction, thus facilitating the accessibility of the collected data.

HOW TO

1. Define the main information categories related to your research goals. This is usually based on your discussion or observation guide topics.

2. Create a template with the categories that should be filled-in it with the researchers who were in the field and divide the filling work.

3. Plot all the analytical debrief documents on a wall to start the interpretation phase. To facilitate the data crossing, you can put together debriefs that share any characteristics like participant profiles, location, etc. — or tag them with color-coded post-its.

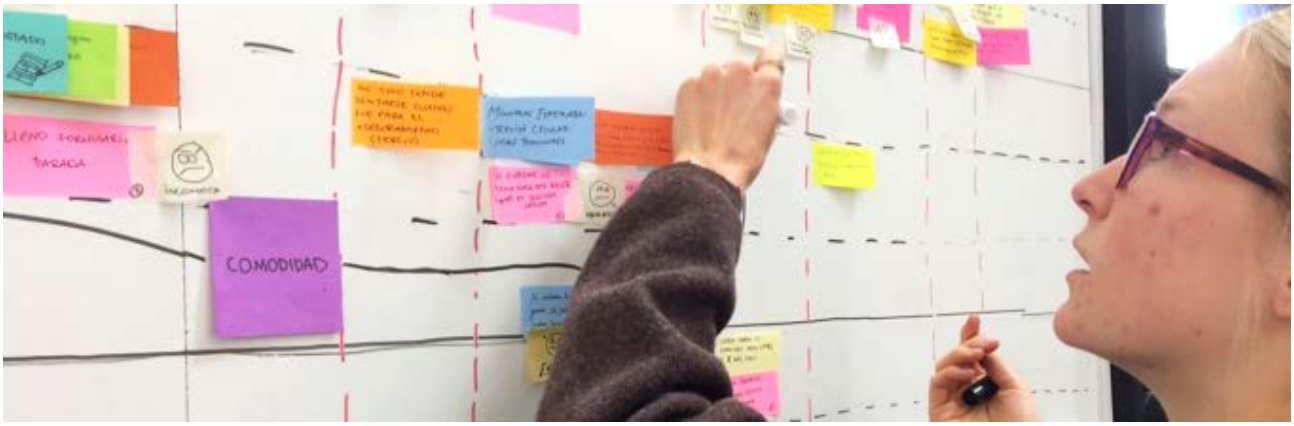


Raw service journey

Fieldwork data compilation in a spreadsheet of participant data vs a predefined service journey. Useful when analyzing a service with a well known flow.

HOW TO

1. Define an overall service journey with steps that are clearly identifiable when analyzing user's actions and activities.
2. Make a spreadsheet crossing each participant of the research with the "define" stage of the service journey.
3. Populate the spreadsheet with what and how each participant lives through that stage of the service journey. Gather this data from the fieldwork output (notes, transcripts, videos, etc.).



Individual journeys

Fieldwork data compilation crossing participant data vs their own process when taking part in a service. Useful when identifying the services stages and the perceived issues of users.

HOW TO

1. List all the research participants in a frame (Excel spreadsheet, a whiteboard, etc.)

2. Go through fieldwork output material (notes, transcripts, videos, etc.) for each participant and log each of the steps the participants take when taking part in a service, with specific regard to how it was done during the research.

3. For each service journey stage identified on each participant, compile their drives, barriers, tensions, statements, or any other peculiarity that was found on research.

ORGANIZE | INTERPRET | SYNTHESIZE | PRESENT

Drivers, barriers and tensions

Research revisitation for each participant recognizing and writing down drivers for the research topic: barriers, unknown facts as statements, and potential tensions or controversies

HOW TO

1. Set up an analysis session with the project team, with all the research output material at hand.
2. Each researcher makes a brief presentation of the fieldwork experience he/she had during the project, going through the research output material of that particular participant and presenting the findings to the team.
3. The team writes down any drives, barriers, unknown facts, and tensions they perceive during that participant presentation and fills in the framework.

Debrief sessions

Meeting among researchers to present the impressions of what was seen and heard in the field, registering what is being talked about on a framework.

HOW TO

1. Set up a framework in which the downloaded material will be imputed (e.g. an excel sheet, a notes application, printed templates, divided walls/whiteboards and post-its, etc.).

2. The researchers take turns presenting first their initial opinion of the the research they conducted, then revisit each main topic of the the study, gathering data from the fieldwork output materials and the research interview guides.

3. A notetaker assigned for the task should compile the presentations and discussions into the predefined framework.

Topic guided framework

A download of research findings into a spreadsheet that crosses participants vs. the main topics that were discussed on the research according to the discussion guides.

HOW TO

1. In lines, organize the spreadsheet to account for all the participants that took part in the research stage.

2. Set up a column for each main topic that was discussed on the research (e.g. the topics or main questions of an in-depth interview). Share this spreadsheet with the research team.

3. Each researcher fills in the crossings of participant vs topic with the findings (e.g. with the answers) from the research, gathering data from the research output materials.

Meaning definition

Understatement of the context behind the participant's answers in order to better analyze answers and results.

HOW TO

1. Review the findings previously organized, looking for patterns and similarities among them.

2. Cluster these findings according to their "meaning group." For instance, "findings of people getting angry, excited, anxious, impatient, etc." regarding a particular service can be grouped into "emotional reactions".

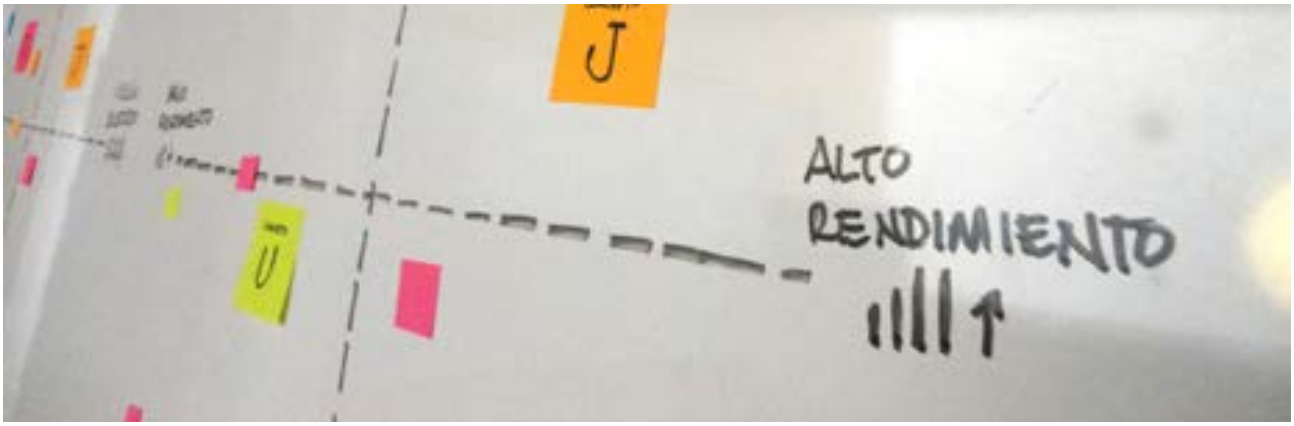
3. Analyze these clusters to understand the why of the answers. To further the previous example, "why and how were people getting emotional?"

Point of view change

Interpretation of findings as if it were lived by a different persona. For instance, “if the participant were an elder or child, how might the finding be different?”.

HOW TO

1. Identify the core experience the finding is based upon. For instance, when dealing with a barrier about a certain feature that is hard to navigate on a smartTV, the experience would be “operating the TV through the remote control.”
2. Identify a meaningful persona for the context. For instance, “how would an elderly person be living that experience?”
3. Compare the research finding as it had been done by the defined persona. From this analogy and comparison you can extract potentially different insights.



Analytical axis

Interpretation of a collective of findings in search for common variables that can be used to classify them over a set of axis (usually one or two).

HOW TO

1. Cluster the information (e.g. findings, participants, situations, products evaluations, etc.) by affinity.
2. Ask yourself what is the main variable that differentiates these clusters. This is likely one analytical axis.
3. Try different variables to differentiate the clusters, and rearrange them along the axis. Try to get a pattern that is spread out along the axis, as this will mean that the variables are indeed important to categorize the cluster.

Cognitive biases

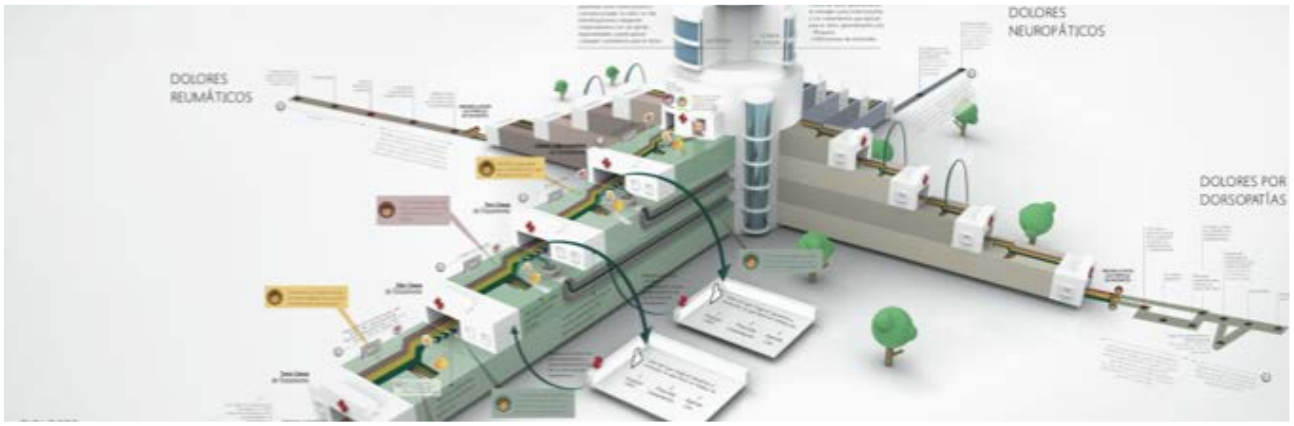
Usage of external knowledge like existing theories to support interpretations of the why and how of behavior, like cognitive psychology, behavioral economics biases, etc.

HOW TO

1. Gather aspects from a set of previously stipulated behavioral biases that may fit with the project's context (e.g. economics, shopping behaviors, decision making, etc.).

2. Analyze within the optics of these biases the fieldwork findings to perceive behaviors that would otherwise go unnoticed or support insights that lack explanations.

3. Define further implications and "what-if" scenarios that could result from that identified behavior.



Future scenarios

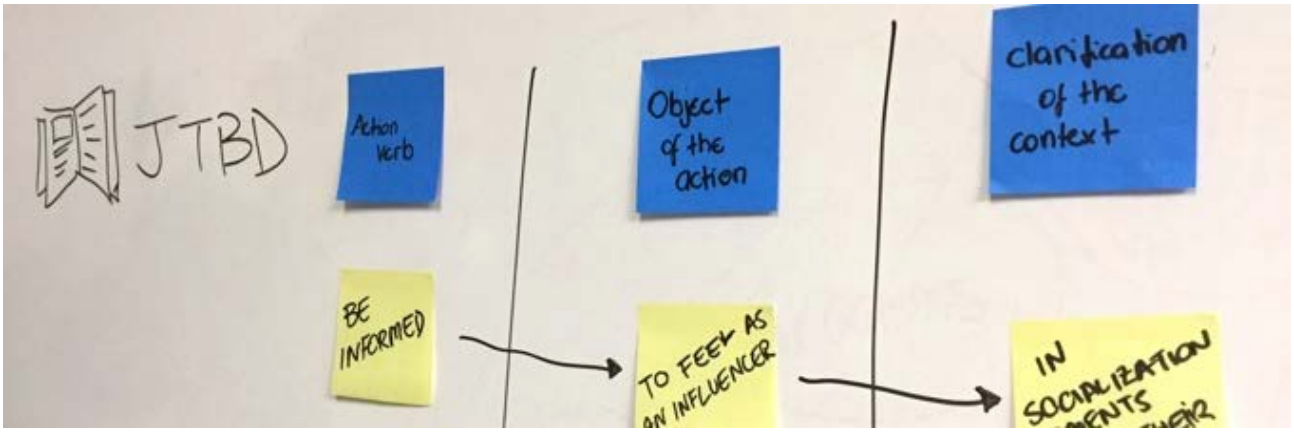
Fictional scenarios that consider the most uncommon influence factors that could impact the future, exploring how it will influence users' behaviors — and how it could affect business.

HOW TO

1. From secondary data, identify potential future influence factors that would be impactful on the research subject. For instance, how government changes or environmental issues could influence your subject in the future?

2. Plot the identified influence factors in frameworks that analyze their impact on the researched subject, like a 2x2 matrix that crosses level of uncertainty vs impact.

3. Gather the most relevant findings of the research and analyze them in the optics of each mapped scenario.



Jobs to be done

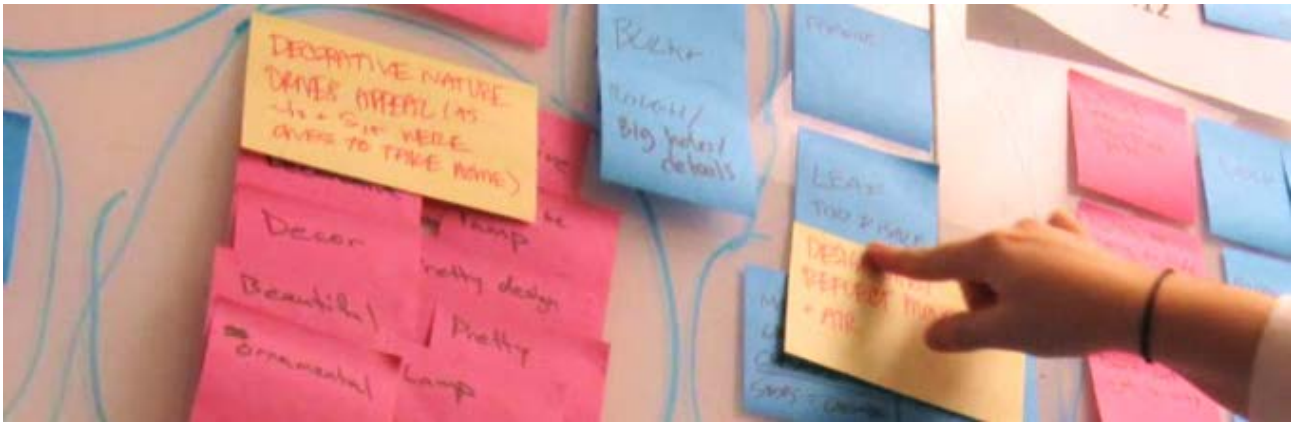
Identification of the higher purpose of behavior and decision-making — the real value people look for when buying products and services may be secondary to the main expected experience.

HOW TO

1. Look at your findings and ask "what customers are ultimately trying to accomplish?".

2. Categorize the Jobs to be Done in main jobs and related jobs. For instance, "be informed" may be a job that a newspaper must meet (main job), but people seek to be informed to be able to socialize with their group (related job).

3. Create Job Statements using an action verb (Be informed), the object of the action (to feel as an influencer), and clarification of the context in which the job is performed (in socialization moments within their group.).



Insight statements

Sentences that translate bigger clusters of meanings to describe revelations or unexpected things that make us pay attention to the big picture using a fresh and and user-centered perspective.

HOW TO

1. Take the findings mapped during the interpretation phase and cluster them into bigger groups of meanings by their affinity.

2. Phrase sentences that gives relevance to the observable facts in a way that generates opportunities, usually through a perceived tension.

3. Make sure that these sentences convey the sense of a new perspective or possibility, that they aren't obvious facts but the results from their interpretation.

Design principles

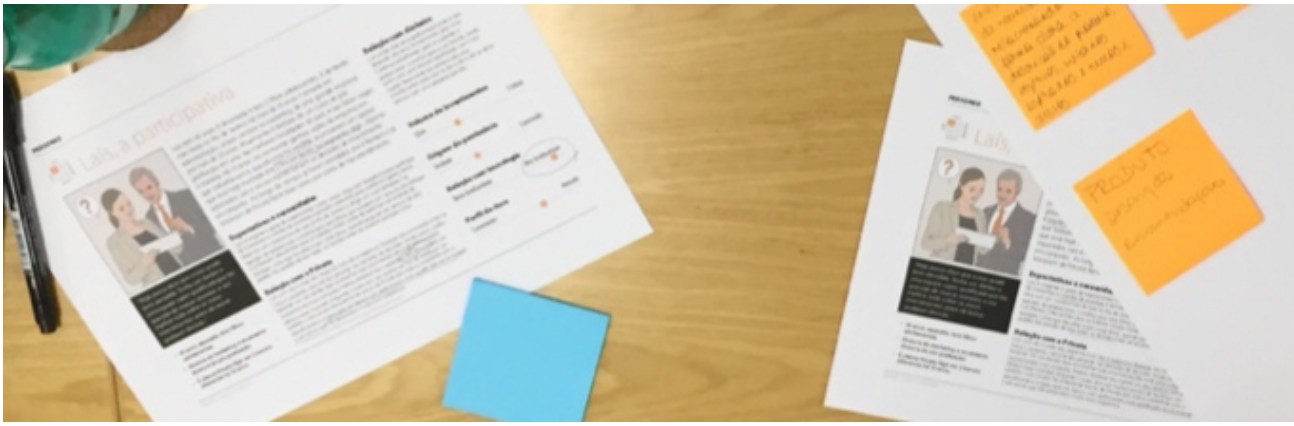
Principles based on the insights from your research that should guide the design of any solution, working as a stimulus during the creative process and also as a metric for evaluating ideas.

HOW TO

1. Look at your insights and opportunities areas and define what this knowledge should mean when designing a new solution.

2. Frame these as positive statements that might tell you how and what to design, usually they are 3 to 6 principles. Try to avoid overly complicating them.

3. Review your Design Principles and make sure they cover the key aspects of any solution you might came up. Modify any that don't.

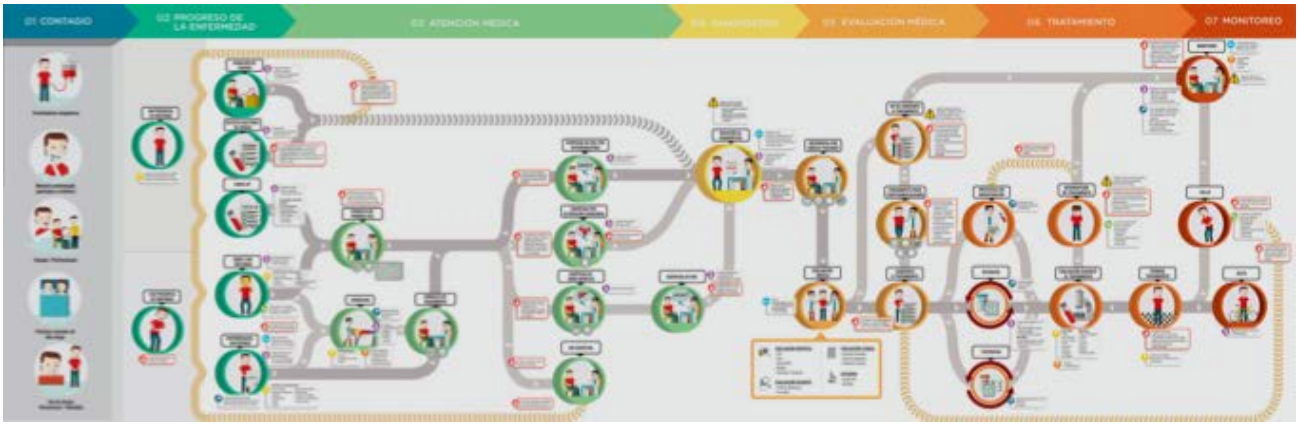


Personas

Users' relevant behavior patterns described in archetypes that represent them. Unlike a customer segment, a persona describes a person's behavior in a humanized manner.

HOW TO

1. List the types of users that you found, thinking not only about demographic characteristics (gender, age, social class, etc.) but mainly behavioral one (values, aspirations, needs, habits, motivations, etc.).
2. Group them by similarities and give a name to each group.
3. Create a fictional character that summarizes each group pattern and describe and illustrate their behaviors, lifestyle, barriers, journey etc.

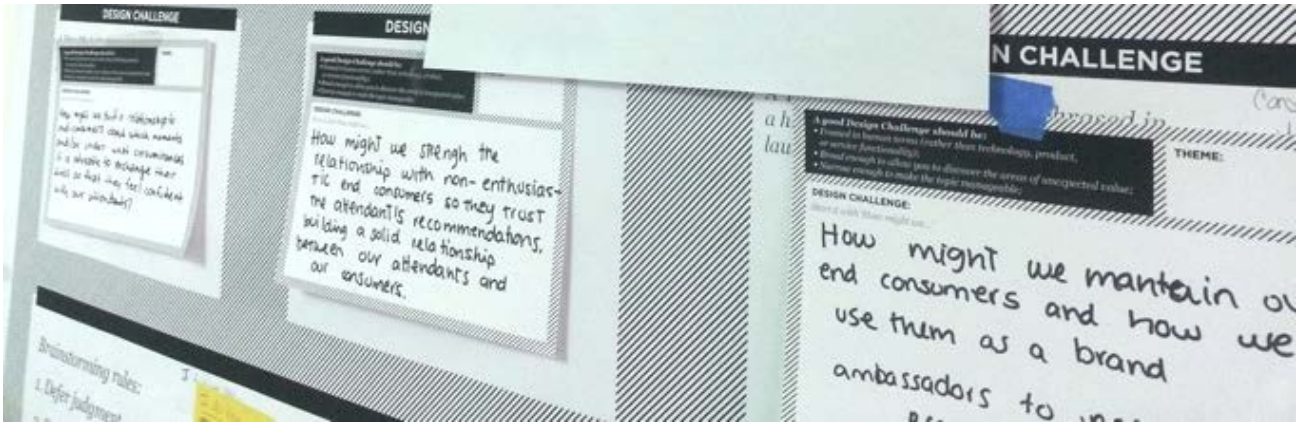


Journey diagnosis map

Analysis of an experience over the time, evaluating it in different moments and touchpoints to facilitate defining key moments to strategize about in a product, experience, or service.

HOW TO

1. By looking at your data, define the main phases and steps of the experience you are analyzing. Consider the experience in a broad way, thinking also about the moments before and after the core activities.
2. For each step, define the stakeholders involved, timeline, touchpoints used and user thoughts and emotions.
3. By looking to the whole journey, define the moments of truth (those that are crucial to the experience).



"How might we..." questions

Challenges based on insights from the research that suggests that a solution is possible and inspire the team to answer them in a variety of ways.

HOW TO

1. Start by looking at the insights you find and try rephrasing them as questions by adding "How might we" at the beginning.

2. Try to answer the questions you created and check if it is inspiring a wide range of ideas.

3. Good how might we questions shouldn't be too narrow in way that directs to only one idea and neither too broad making the team to lose focus or make difficult to generate ideas.

Ecosystem map

Identification and evaluation of the different parts of a system that are important for the supply of the whole ecosystem services.

HOW TO

1. Define the main elements of the system you are mapping. For a retail product ecosystem, for example, you might have, product manufacturers, distributors, retail stores, shopping malls, final client, advertising companies etc.

2. Define the main relationship and transactions between the different elements, like money, information, materials, products, etc.

3. Analyze each interaction and map existing gaps, barriers and opportunities that might exist and how they are impacting the whole ecosystem.

Documentary video

Compiled fieldwork video clips that present quotes and visual findings as evidence for the identified research insights. Used to sympathize with the stakeholders; presents insights with direct fieldwork support.

HOW TO

1. Plan the insights presentation in a storyline flow that makes sense chronologically to the spectator.

2. Make a storyboard with each insight being supported by a participant vocalization that is extracted from the fieldwork raw video files.

3. Compile the raw video sketches into a short video, 3 to 5 minutes long, that should be edited and visually refined to enhance its presentation potential.

Storytelling animation

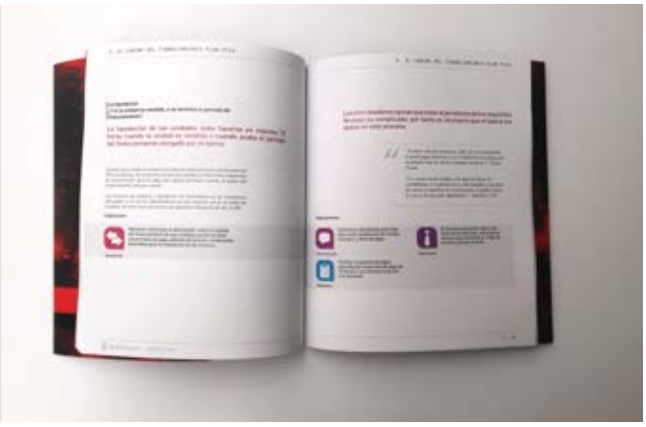
Short 2D or 3D animations that create a visual story to highlight the identified insights; creates a fictional character to exemplify a persona or demonstrate a service.

HOW TO

1. Define the characters that will lead the story presentation. Usually the animation character represents a persona used during the analysis stage.

2. Make a storyboard dividing the main insights that should be presented during the flow and define how the scene will be, what the characters will do, say, and what will be written on the screen.

3. Render the animation process according to the storyboard.



Detailed report

Self-explanatory report presenting the identified insights organized in areas or territories with charts and models supported by research findings such as pictures and participant's quotes.

HOW TO

1. Organize the report structure, dividing the content that should be presented in major areas and how each area will be related to one another along the report.

2. Define a template to present an insight with findings and fieldwork evidence (e.g. pictures and participant's quotes). Replicate the model to all other insights.

3. Design models and charts that help visualize insights and their correlations.

Inspirational posters

Posters that should provoke reflective reactions when read. Usually contains insights structured to make the reader think of the subject in a way that may be conflicting with ongoing understandings of the situation.

HOW TO

1. Prioritize the insights that should be presented in the posters.
2. Raise questions that each insight brings to the reader. Analyze these questions to understand which ones can cause the best rationalization or the most disruptive thinking.
3. Design posters that mix up insights and fieldwork support that should draw attention from readers and cause inspire the reader to think about the problem in a different way.

Infographics

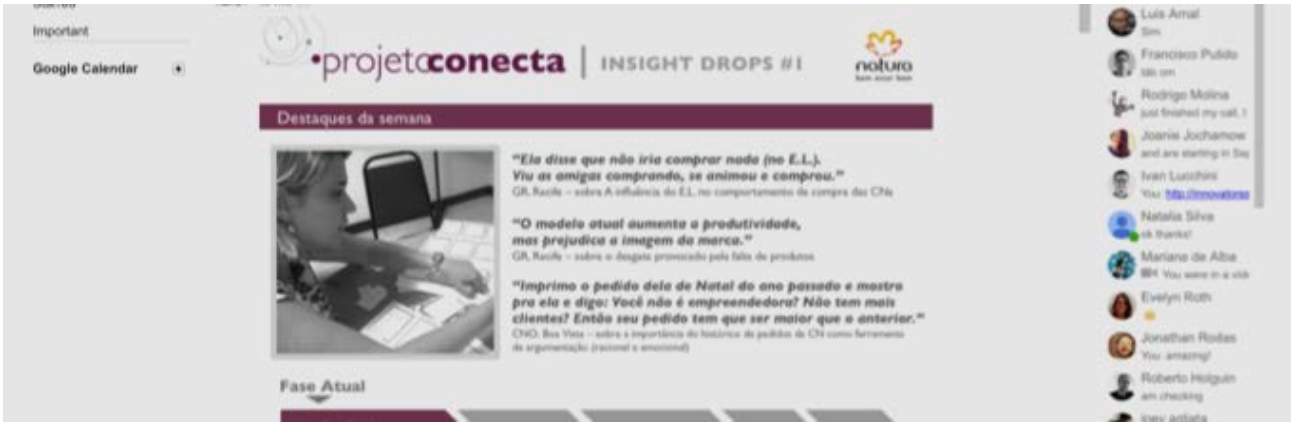
Visual representations of qualitative and quantitative data that help translate complex scenarios, connections, and values into easily understandable information.

HOW TO

1. Define the goal of the infographic: what are the main information that should be communicated?

2. Define the different information layers and sketch the structure, flow and connections that should be presented on the infographic.

3. Populate the infographic with the data from your research analysis and test it with someone not related to the project to check if it is easily understandable. Make any adjustments needed.



Insight drops

Small "information pills" with research results sent over time to the audience to facilitate content digestion and constantly foster inspiration within different teams.

HOW TO

1. Define the main insights from the research that should be shared with the audience and a template to describe them.
2. Define an appealing digital format to send the content, like e-mail campaigns, one-page PDFs, etc.
3. Create a schedule (weekly, biweekly, etc.); produce and send the content over time.

Ideation workshops

Creative sessions in which the audience generates ideas based on research results, thus providing the uptake of research outputs and demonstrating its potential use for innovation practices.

HOW TO

1. Define the main and most inspiring insights from the research, design, and ideation workshop agenda based on them using creative techniques. Ensure that there is enough time to present and dig deep into the research results before starting ideation.

2. Select participants, schedule the workshops, and send the invites.

3. Run the sessions and devote special attention to the audience's understanding of the research insights.

Games and toolkits

Tools that encourage reflection on the field research results and facilitate content dissemination by using engaging hands-on activities.

HOW TO

1. Define the main research outputs that should be digested by the audience and map possible understanding barriers.
2. Create activities that the audience must perform to reflect on the research results and define how many people, materials, and time should be spent in each activity.
3. Design all the materials and test it before presenting.

Executive presentation

Quick and action-oriented presentation that aims to uncover the main findings and implications of the research; increases engagement and decision-making from leadership parties on the results.

HOW TO

1. Organize all the insights that you've identified during the project and classify them on a scale of relevance for the business.

2. Define a chronology that makes sense to present the most relevant insights in a way that enhances storytelling.

3. Visually present the insights strongly oriented to potential implications and outcomes. Each insight should point towards an impactful business implication and should not merely highlight something that was learned during the research.

☐ ORGANIZE ☐ INTERPRET ☐ SYNTHESIZE ☐ PRESENT

METHOD TITLE

BRIEF DESCRIPTION

HOW TO

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2.

3.

☐ ORGANIZE ☐ INTERPRET ☐ SYNTHESIZE ☐ PRESENT

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