Lecture 3: Research methods

Thursday 28.02

AALTO BA SERVICE DESIGN 2019

Nuria Solsona

Research objectives, process & methods

PART I: Defining the problem			
W1	**W2**	**W3**	**W4**
Deep dive into the topic	**Research & Analysis**	**Service propositions**	**Validate & Iterate**
Deep dive into the topic and get familiar with the current service	Identify the relevant pains that exist today in the learning journey	Define concepts that turn pains into opportunities for a better future	Get early feedback and choose one concept

**What are the pains that are relevant to solve?**
Each concept will explore opportunities to address specific pains

Discovery phase mindset

In the design process, research sits in an exploration phase to open up understanding and learn what problems are worth solving.

It requires a solution-agnostic mindset. **Listening** is the most important skill at this stage...

- As a way to identify new opportunities, **before you know what it could be designed**

- **To make informed decisions on the project direction**, to define design hypotheses, when you have some ideas about what will be designed.
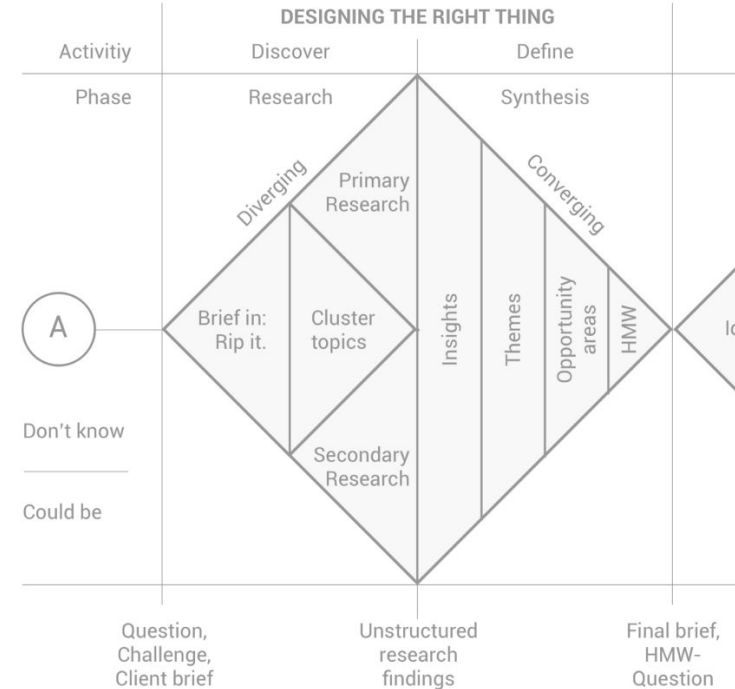
RESEARCH OBJECTIVES

The objective is to learn about..

1. Human experience, people's life events

- Who your stakeholders are and what they're trying to do in the context of your (future) service
- What people hope to accomplish. What users need from the service to achieve their everyday goals

2. Service experience pain points / user needs

- The problems or frustrations they experience with existing services
- How they currently go about it (for example, what services or channels they use)

3. User behaviours

- Your stakeholders' drivers and motivations to join a service
- The factors influence their decision-making process

Research process

RESEARCH PLAN	**FIELD WORK**	**ANALYSIS & SYNTHESIS**
Determining research scope and conducting secondary research	Conduct interviews	Sensemaking: Download, Cluster and Insights
Defining participants of the study who to interview	Observe context	Research outputs
Determine how to conduct the research methods, team, location, timing, and budget	Try and experiment service moments	
Where: Selecting location(s)	Documenting fieldwork	

Research methods: Ethnography

Primary research in service design is 'ethnography-inspired'.
Key characteristics are:

Human behaviour vs. User needs
Whereas user research focuses on what the user needs are in relation to the user-product/service relationship. Ethnography research takes a further step back to understand human behaviours.

Empathy: The role of designers
Understanding another person's experiences, emotions, and conditions from her or his perspective through active listening, without letting your own personal assumptions and biases get in the way.

Understanding context: Conducting fieldwork
To get insight on people's behaviours observing people's practices in their natural habitat is best to learn about what people really do (behaviours) – which is different from what people say (attitudes).

"It focuses on the broad patterns of everyday
life that are important and relevant
specifically for the conception, design and
development of new products and services"

Salvador et al., 1999).
Design ethnography

"Ethnography is observing people's behavior in their own environments so you can get a holistic understanding of their world – one that you can intuit on a deeply personal level."

LiAnne Yu
Ethnography-design

Conducting fieldwork

We analyse experiences to design services

To understand experiences the best way is to experience it yourself. Service designers take the perspective of people (empathy) and combine two lenses to get understanding from them:

- Context-based research, learn what people do in their life
- Service-based research, understanding the service 'as is' by mapping their current experience

Service design has many creative techniques to gather raw data about people's experiences.

In-context interviews

Customer interviews are in-depth conversations which help gain insight into their lives and experiences.

Most usefully these take place in their natural environment, so that context can be taken into consideration.

Interviews are not questionnaires! Instead they are informal semi-structured conversations that aim to discover deep hidden needs and behaviours. Designers use discussion guides to help them stay on topic.

Image from Livework studio

Observations

This method is very useful for getting a first understanding of the context,, and the reality of what people do, rather than what they say they do.

It is best used in combination with interviews to uncover the root cause of certain behaviours. *Why do travel like that?*
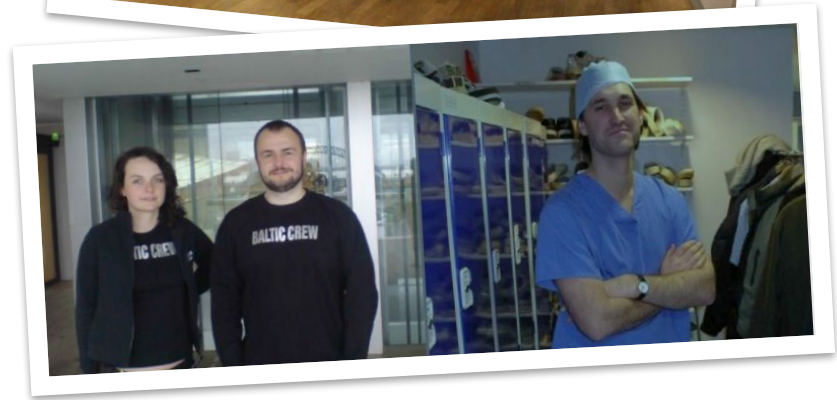

Image from Livework studio

Shadowing

Shadowing can entail watching or following an individual or many people experiencing a service. Quite often shadowing is combined with an interview.

Often by watching someone using a service we learn things that they would never tell us and understand why people have problems with certain tasks.

Very good for understanding experience pain points

Image from Livework studio

Image from Livework studio

Documenting fieldwork

INSIGHTS SUMMARY TEMPLATE

live|work

Participant name: .... Actor role: .... Segment and Organisation: .... Date: ....

Profile:

Key quotes:

1. ....
   ....

2. ....
   ....

Purchase drivers

Decision-making process

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NOTE TAKING:

INTERVIEW PROMPTS: TIMELINE A DAY IN YOUR LIFE
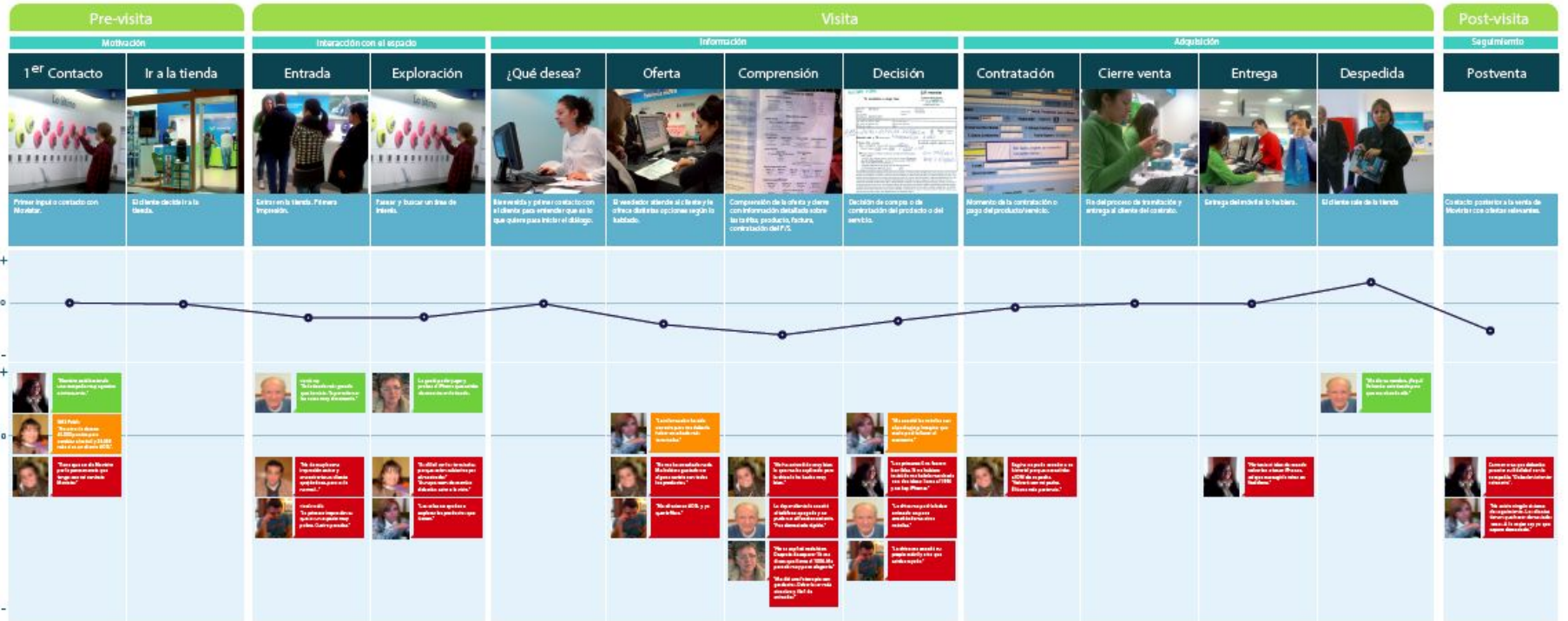
PRESENTING ANALYSIS: SERVICE EXPERIENCE MAP

In-context interviews

Guidelines

1. It's NOT an interview it is conversation

2. Seek to understand the reason why and what it means

3. Pull out stories not opinions

4. Use prompts to ease the conversation and steer focus

5. Meet them at their context of use

Planning interviews

Recruitment: Selection of the right participants is crucial. 5-8 people can be enough if they are the right people to learn from. Aim to meet a mix of user profiles: attitudes, demographics and behaviours. **Extreme users** can help to learn from a variety of behaviours.

Arrange time: Arrange time with participants in advance and inform them about your topic and confirm the time of the interview.

Intercepts: Plan the best time and place to find the right participants. **Design the interview for short encounters**.

Design the interview: Prepare a **discussion guide and prompts** to help you guide the conversation. Think about the documentation of the interviews, pictures, videos, are highly recommended. How will you capture it? Think about note taking techniques and split up roles.

Types of questions: Human experience

Objective is to learn about:

- Who your stakeholders are and what they're trying to do in the context of your (future) service
- What people hope to accomplish. What users need from the service to achieve their everyday goals

Example questions:

– Tell me about yourself, why are you studying?

– **What problem is (specific service) solving for you?** What do you need to get done (in your life) when using this service?

– What (other) services do you use to help *you solve these*?

Types of questions: Service experience

Objective is to learn about:

- The problems or frustrations they experience with existing services
- How they currently go about it (for example, what services or channels they use)

Example questions:

– Tell me about the experience of this service (before/during/after)
– Have you experienced any issues? What would you improve?
– What else could it do for you?

Types of questions: User behaviours

Objective is to learn about:

- Your stakeholders' drivers and motivations to join a service
- The factors influence their decision-making process

Example questions:

- Why did you choose this service? What triggered that decision?
- When do you use this service? Why?

Tips

- Avoid leading questions

- Balance open-ended with direct questions

- Aim for 1 hour or more

- Spend 10-15 minutes on getting to know your subject

- Have a goal in mind

- Balance breadth and depth

- Play back your understanding and validate initial insights

- Be genuinely interested and non judgmental about what your participant is talking about

Exercise
Research plan

Scope & Research focus

Life stages in the learning journey:

STUDENT	FIRST JOB	WORKING LIFE	CAREER CHANGE	UNEMPLOYED	RETIRED

Research focus:
– Choose one life stage

– Get in-depth understanding of the learning journey of one life stage across all the Aalto service areas (finance, health,...)

Research plan

RESEARCH PLAN

Choose what life stage in the learning journey you want to focus on

STUDENT · FIRST JOB · WORKING LIFE · CAREER CHANGE · UNEMPLOYED · RETIRED

WHO? Define the attributes that make users different or 'extreme'

Life / Work situation
Aalto relationship
Level of studies

Combine the above and group them into initial user types (Max. 5)

WHERE? What services do you want to explore and learn from?
In what context is best to interview your participants?

DISCUSSION GUIDE

Understand their life stage and their current learning journey experience
1. Tell me about yourself. Why are you styding? What do you hope to accomplish
2. What problem is Aalto services solving for you?
3. What other services do you use to help you solve those?

Understand the pain points of current services
1. Tell me about the experience of Aalto services (before/during/after)
2. Have you experienced any issues? What would you improve?
3. What else could it do for you?

Uncover triggers and motivations. When and why do they use the service
1. When do you use (specific service)? Why?
2. What channels do you use? Why?

2019 AALTO BA SD Research plan

Assignments
Fieldwork + Parallel research

Assignment: Conduct <u>first round</u> of fieldwork & Observations

Due on Wednesday 06.03

- Complete research plan

- Divide in two sub-teams (min. 2 people per sub-team)

- **Each sub team has to conduct a minimum of 2 interviews (total 4 per team)**

- Each subteam divides in two roles: interviewer and notetaker

- Each sub-team will document their interviews in a written form

- Each sub-team will conduct additional observations on the service and document it in pictures/videos

Assignment: Conduct <u>second round </u>of fieldwork & Observations

Due on Monday 11.03

- Finalise interviews a total of 8 (minimum, it can be more max.12)

Assignment: Parallel research

Due on Monday 11.03

- Identify 5 best practice examples of existing services that caters learning experiences specific to your life stage

- These will be used as references for inspiration

- Document with images and descriptions about the experience and why you think these are good examples. Format can be Word doc., Sketch book, blog, pinterest board, etc,...