Research Insight Program Overview

Infusing insight, at scale

Part One

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You have to **deeply understand** the essence of a product in order to be able to get rid of the **parts that are not essential**.”

-Jonathan Ive

Research Program & Case Studies

Transforming customer-centric knowledge into actionable insight

Part 1:
Insights Maturity & Roadmap

Part 2:
Financial Services Case Study

Part 3:
Healthcare Case Study

Establishing Design Research Strategic Vision

01 Basic usability testing

Conducts new feature usability tests in the solution space

Level 1.5: testing problems users contact support about

02 Interview-based task design

Sessions begin with an interview to discuss how a user might use a specific feature

03 Basic field research

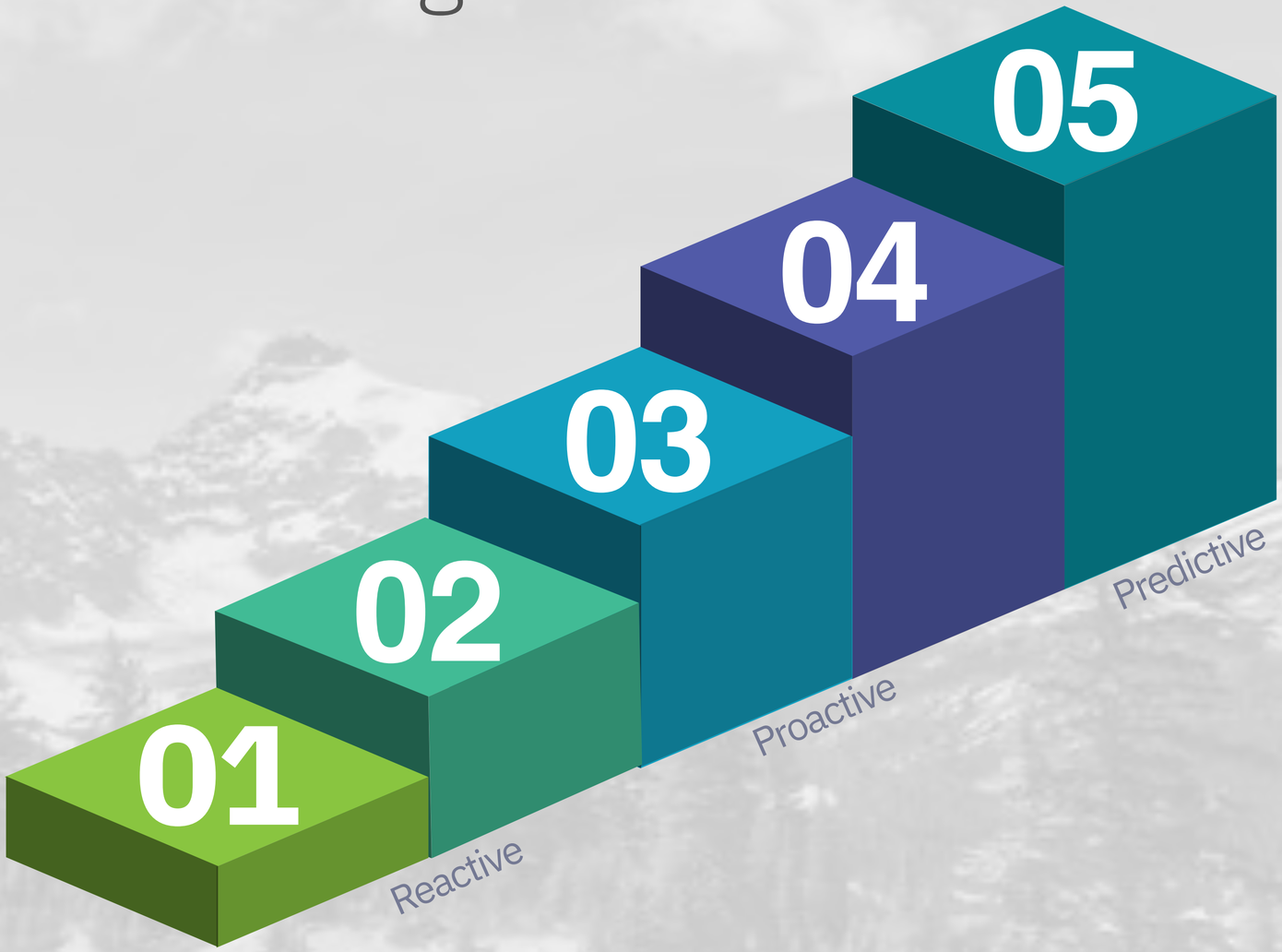
Still doing usability testing, but now we also go to see our users in their environment

04 Generative research

Instead of starting with a solution, and trying to work backward, you are actually **entering from the problem-space.**

05 Longitudinal studies

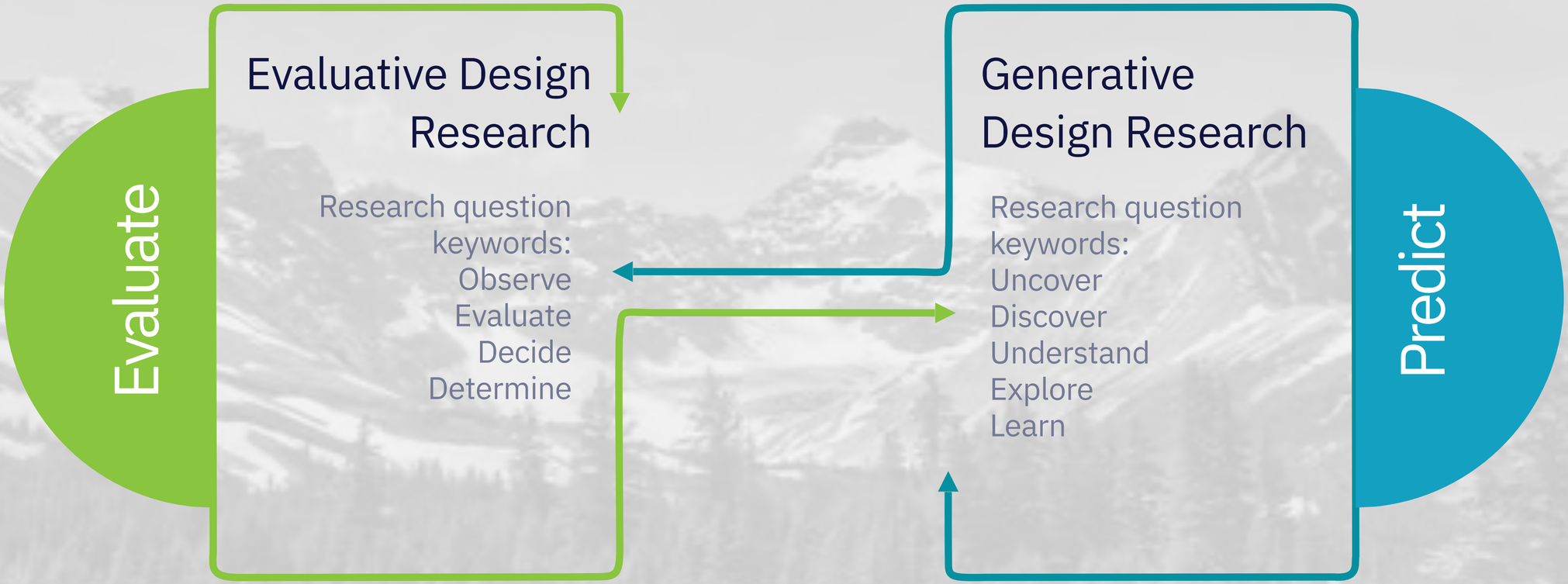
Continual study the end-to-end experience of our users and we know what users need before they tell us



Assessing current vs. the desired maturity is the first step in creating a research program roadmap

Discerning between different types of research

Crafting summative vs. formative studies



Look for these **keywords** to help determine the maturity of a design research program

"Themes are a **Promise to Solve Problems**, Not Build Features"

-Jared Spool

Knowledge management is the secret sauce behind proactive design research programs.

Building a Design Research Toolkit

Choosing an appropriate method to contribute to organizational knowledge

Market Analysis

Uncovers customer segments and customer opinions (What users/buyers think)

Generative Design Research

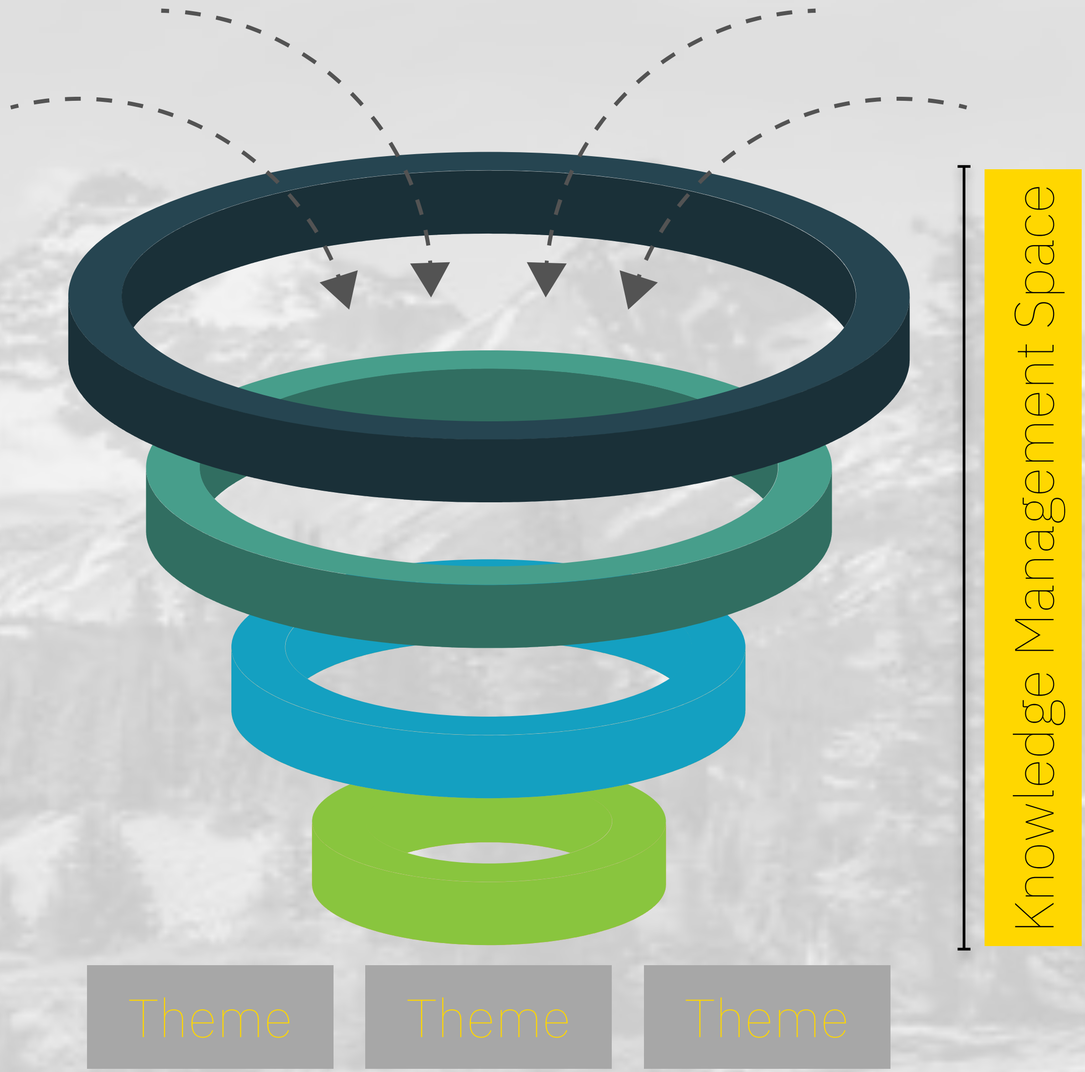
Deeply “generates” an understanding of who your customers are and can uncover unmet or previously unknown needs

Quantitative Insight

Evaluate statistical/numerical data to draw generalized conclusions about users' attitudes and behaviors

Qualitative Insight

Explores, in-depth, areas of insufficient knowledge about why and how users behave



Creating an insights pipeline

Scaling Design Research

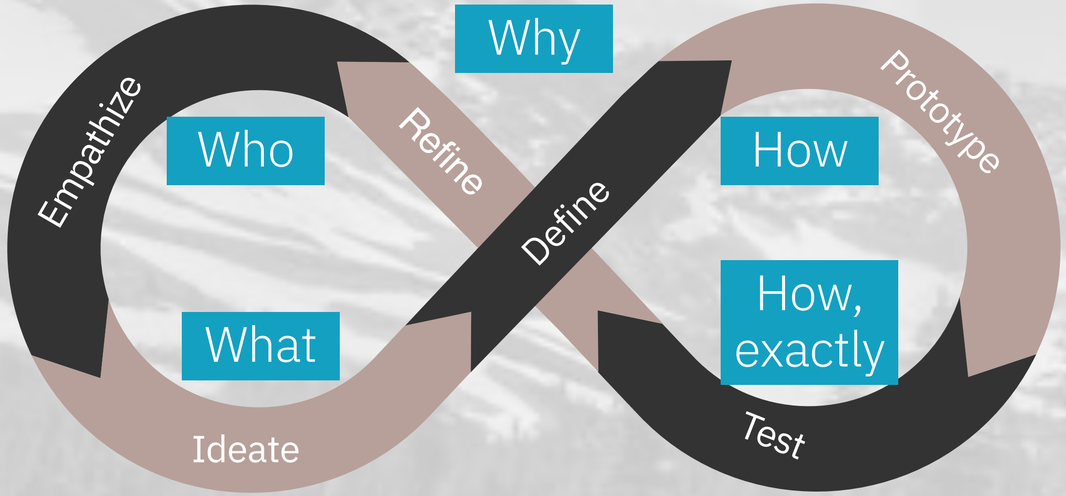
Problem -Focused

Solution-Focused

Strategic (Wedding Cake) Research Track: Infuses insights into product roadmap activities (iterations may span months)
Tactical (Birthday Cake) Research Track: Infuses insights into product feature prioritization (iterations may span multiple sprints)
Summative (Cupcake) Research Track: Evaluates design (may take place every sprint)

Leveraging Framework Thinking

Building a collective 360 view of the market and user needs



Researchers quickly navigate by codifying insights into frameworks designed to abstract experience into principles that can be broadly applied to a variety of situations.

Framework examples include:

Design Thinking

Empathy Maps, Journey Maps, Big Ideas

Research Maturity

Reactive,, Proactive, Predictive

Bloom's Taxonomy

Define prerequisite user knowledge or literacy to complete an experience

Pragmatic

Contextual exploratory and evaluative process

Cultural

Hofstede cultural dimensions, PEST Analysis, Socioeconomic analysis

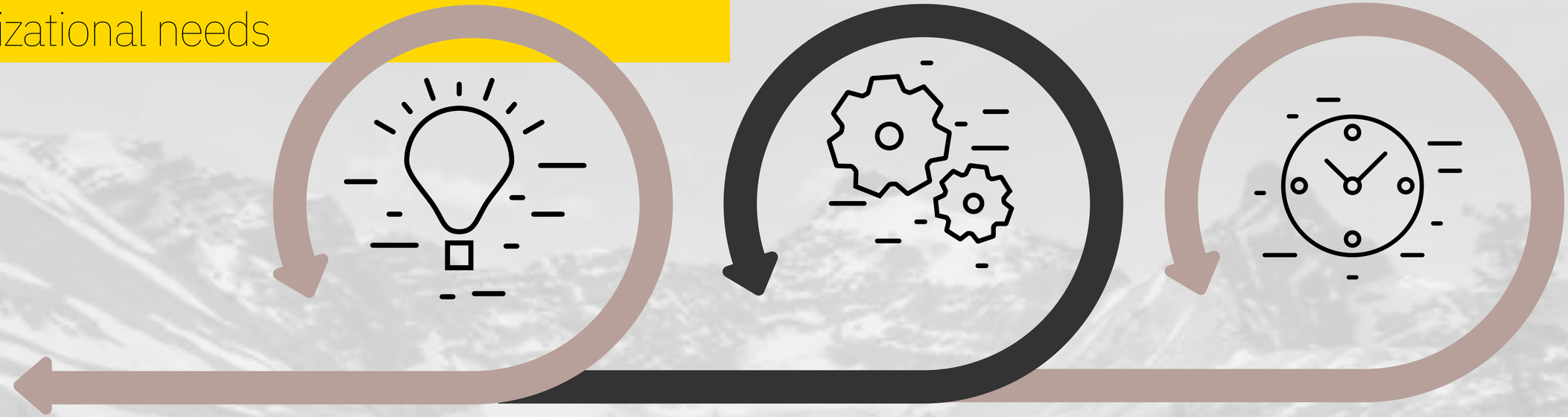
Six Sigma

Quality Function, Kano, Cause and Effect Diagram

Learn more about framework thinking HERE

Design Research Tools

Matching the method to user and organizational needs



Market Opportunity

Translate strategic insight into business opportunities via generative quantitative and qualitative research.

Design & Deliver

Design and deliver user-inspired products and services aligned to strategic goals and industry trends.

Sense & Respond

Identify and develop opportunities to drive customer satisfaction and retention.

	Market Opportunity	Design & Deliver	Sense & Respond
Methods	Field research, focus groups, surveys, archetypes, as-is journey map, competitor analysis, churn rate, Customer Lifetime Value (CLV), market size, price studies	Usability testing, card sorting, concept testing, heuristic review, A/B testing, task analysis, call or support reason tracking, KANO	Net Promoter Score (NPS) Customer Effort Score (CES), Customer Satisfaction (cSat) retention rate, usage analytics
Activities	Find ‘friendlies’, talk with experts, involve stake holders, Design Thinking, hunt for data, define initial KPI’s	Map features to need, consider ethics and equity issues, protect user data	Gauge user sentiment, inform feature roadmap, recruit for future studies.

Organizational Knowledge Management

Design research maturity requires intentional management of insights

Must-have to scale a research program

Knowledge Management Space

Coding is an analytical process in which data, in both quantitative form or qualitative form are categorized to facilitate analysis

Initial grouping of related codes and first step towards thinking about solution(s)

Categories are grouped into solution space themes in preparation for prioritization in the backlog

Customer inspired solutions prioritized within product backlogs

“This is critical if we’re to ensure that the most important design decisions — the decisions that lock us into the specific solutions we’re delivering — are made by people who truly understand the problem. That’s where **proactive UX research** comes in.”

Jared Spool (February 2020)

Design Research Program Maturity

Key takeaways when building a Design Research Program

Mature Purposefully

Gauge the level of research maturity at your organization and set maturity goals..

Relentless Curiosity

Hire those that ask the right questions and can tell a data-driven story.

Organizational Knowledge Management

Don't cut corners with insight management. Use coding to create and maintain a collective understanding of the experience

360 view of user

Appendix

simply DESIGN

Dissertation

Customer-Centric Transformation

Examined customer-centric organizational change through the theoretical lens of social exchange theory.

Findings:
To be customer-centric, an organization must derive its goals from the voice of the customer (VOC) data (listen), communicate these goals broadly throughout the organization (learn), and instruct employees in how to achieve these goals (act) (Tempkin, 2012a) play a significant role in customer-centric change and calls for further research to construct support frameworks for customer-centric change agents.

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Abstract
This purpose of this study was to examine customer-centric organizational change

through the theoretical lens of social exchange theory (SET). The focus of this study was employees who constantly weighed the perceived organizational benefits or punishments in response to their behavior. SET theorists have long viewed actors in social exchanges (i.e., employees) as non-emotional beings; however, closer review of the variables constituting social interactions reveals that emotions can often play a critical role in driving behaviors (Lawler & Thye, 1999). In order to be customer-centric, an organization must derive its goals from voice of the customer (VOC) data (listen), communicate these goals broadly throughout the organization (learn), and instruct employees in how to achieve these goals (act) (Tempkin, 2012a). The results of this study suggest that employees may feel frustrated if they do not have access to VOC data (listen), have a clear sense of the firm's customer-centric vision (learn), and engage in training to learn how to apply customer-centric behaviors to their daily work (act). This study suggests that

Full dissertation HERE.

Sources

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https://medium.com/creating-a-ux-strategy-playbook/what-proactive-ux-research-looks-like-bd1c5772c569
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