



# THINKING STYLES

Advanced Training Course  
Class #1  
@indiyoung

# thinking styles

session 1: why thinking styles

the problem with personas  
awareness of unconscious bias  
necessary data characteristics  
participant sketches & nicknames

session 2: finding affinities

establish the focus  
the thinking styles working session

session 3: making thinking styles

describing & labeling segments  
time & place for demographics

session 4: using thinking styles

check your work; compare & matrix  
using segments & measuring value  
making segments from existing data

# housekeeping



Search Indi Young



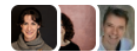
Indi Young



- Threads
- All DMs
- Mentions & reactions
- Saved items
- More
- Channels
  - # 1-listen-deeply
  - # 2-summarize-concepts
  - # 3-cultivate-patterns
  - # 4-thinking-styles
  - # 5-mmd-opppmap-usage
  - # 6-frame-your-study
  - # chat-and-intros**
  - # compare-mmd-to-jtbd
  - # indi-announcements
  - # job-postings
  - # language-culture-differences
  - # ongoing-projects
  - # our-cats-and-pets
  - # persuade-your-stakeholders
  - # project-demo-listening-ses...

### #chat-and-intros

Add a topic



415



everywhere else in those time zones).



5 replies

Last reply

Tuesday, May 4th

Thursday, May 6th



**Alex** 9:49 AM

Just discovered this, [A Designer's Critical Alphabet](#), during an online community development discussion...some interesting starting points for considering bias. Probably should be a capital B there because we're talking many many kinds of bias... (edited)



1



2



2 replies

Last reply 4 days ago

Friday, May 7th



**Meli Glenn** 6:34 AM

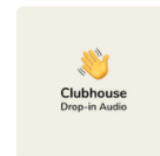
<https://www.joinclubhouse.com/event/xoNwYVIK>



**Clubhouse**

#### The Zoom-bie Plague: Designing for Better Remote work

Tuesday, May 11 at 1:00pm EDT with George White. The past year has turned us into Zoom-bies! The uptick in remote work and videoconferencing has us all staring into the camera. How might we design a better experience for the remote workplace?



Message #chat-and-intros



Aa



### Thread

#chat-and-intros



**Alex** May 04 at 7:47 AM

Just discovered this, [A Designer's Critical Alphabet](#), during an online community development discussion...some interesting starting points for considering bias. Probably should be a capital B there because we're talking many many kinds of bias... (edited)



1



2



2 replies



**Amelia** 4 days ago

Oh lovely! Looks so similar to my University's diversity and inclusion list: <https://equity.ubc.ca/resources/equity-inclusion-glossary-of-terms/#disability>



3



**indiyoung** 4 days ago

Ooo! I love the depth of the definitions in the UBC list! Wow!



2



Reply...



Aa



Also send to #chat-and-intros

you'll see a new slide deck each week on the  
indiyoung.com platform under My Courses/...

usually 12 hours before the Wed class meeting



## Thinking Styles

Learn to create Thinking Styles: deeply researched, demographics-free archetypes for creating and measuring different solutions for different philosophic approaches.

- convert existing personas to thinking-styles
- learn techniques to gather core concepts from existing research
- build vocabulary to spread clarity at your organization

[Go to the course](#)



## Opportunity Maps

Learn to create and use Opportunity Maps for your organization, based on people's real thoughts pulled from qualitative research.

- find gaps in your organization's support for people
- learn techniques used to create a tangible, inclusive representation of people's thinking patterns

[Go to the course](#)

Wednesday **10:30am San Francisco**

Friday **5:30pm San Francisco (Saturday in India/Australia/Asia)**

**Class 1**

10-Feb [check time](#)

12-Feb (13-Feb) [check time](#)

**Class 2**

17-Feb [check time](#)

19-Feb (20-Feb) [check time](#)

**Class 3**

24-Feb [check time](#)

26-Feb (27-Feb) [check time](#)

**Class 4**

3-Mar [check time](#)

5-Mar (6-Mar) [check time](#)



**Week 1**

[Go to page](#)



**Week 2**

[Go to page](#)



**Week 3**

[Go to page](#)



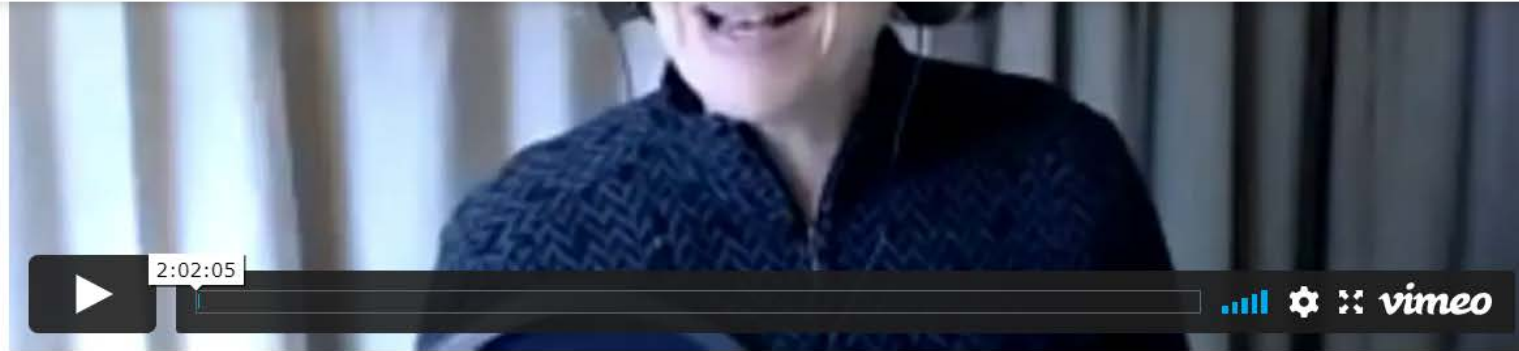
**Week 4 is now available!**

[Go to page](#)

## Concepts & Summaries – Class 2

The video player displays a woman with glasses and curly hair speaking. The video title is "2021 02 Concepts and Summaries Class 2" and it is attributed to "Indi Young". The player includes a play button, a progress bar showing 2:02:05, and icons for heart, clock, and share. The Vimeo logo is visible in the bottom right corner of the player.





### Slides & Exercises

- [Slide Deck](#)
- [In-Class Exercise Cheat Sheet](#)
- [Optional Exercise](#)
- [Timestamps Sheet](#)

### Materials

- [Optional Transcript example with highlights but no comments](#)

### Homework

- [HW 2 Group A Google Doc](#)
- [HW 2 Group B Google Doc](#)
- [HW 2 Audio](#)
- [HW 2 Transcript](#)
- [HW 2 Transcript with Comments](#)
- [HW 2 Cheat Sheet](#)
- (Follow-along only) [HW 2 Assignment](#)

- [HW 2 Transcript with Comments](#)
- [HW 2 Cheat Sheet](#)
- (Follow-along only) [HW 2 Assignment](#)

## Timestamps

Time Stamp	Section	Topics
0:00:16	Welcome	Welcome! We have a good taste and today we can get into more discussion.
0:00:39	Table of Contents	We will get into more nuance about summaries and concepts.
0:01:02	Discussion	How did homework go? "It was a bit tricky, but seeing other people in the same place made me feel not alone." "Bibiana gave me spot-on feedback." "I think I struggled because I didn't have the context of the whole inteirview, and I wasn't able to listen to it." (Apparently I thought my uploaded audio didn't actually appear on the platform, though.)

if some emergency ruins your schedule:  
you can shift to Group A (Wed) or Group B (Fri/Sat)

please **let my assistant Nathan know** (in Slack)

daylight savings shifts **differently**

different dates for different countries

for example

- 21-Oct London 6:30pm = San Francisco 10:30am
- 28-Oct London 5:30pm = San Francisco 10:30am
- 04-Nov London 6:30pm = San Francisco 10:30am

emergency plan:

if Indi's power/internet goes out before/during class  
... check Slack under the course channel for a message

the message will either be from Nathan or Indi, and  
will establish a revised time that we can finish the  
class

if your power/internet goes out during class, you can  
watch the recording of that week's class (you will still  
qualify for the certificate if you do the homework)

I will stop at certain points to ask for questions

- I upload the recording to the [indiyoung.com](http://indiyoung.com) platform a few hours after the Wed class meeting, after the video finishes processing
- there is no recording of the Fri/Sat (Group B) class
- these recordings will remain on your My Courses/... page for:
  - Live: 4 months from course start date
  - Follow-along: 6 weeks from course start date

Group A homework due (for review) Sunday pm

Group B homework due (for review) Thursday noon  
or earlier (yes!)

if you don't finish the homework by the next class,  
Indi will not review it

(if you are aiming for the six-course certification,  
homework is required)

(why? too difficult to review homework retroactively)



## prerequisites for Thinking Styles:

- understanding of Listening Sessions (concepts at surface vs. depth)
- read Medium essays tagged Thinking Styles
- watch latest talk & one “other recording”

## recommended reading for Cultivating Patterns:

- read Medium essays tagged Thinking Styles
- Chapter 11 in *Mental Models*
- Pages 116–119 in *Practical Empathy*

# why thinking styles

first: what are thinking styles?

# thinking styles are

- demographics-free\* archetypes representing different philosophic approaches to a purpose

## thinking styles are

- demographics-free\* archetypes representing different philosophic approaches to a purpose
- based on patterns across participants in deep research\*\*

## thinking styles are

- demographics-free\* archetypes representing different philosophic approaches to a purpose
- based on patterns across participants in deep research\*\*
- where any person might switch thinking styles based on life event or context

# thinking styles are

- demographics-free\* archetypes representing different philosophic approaches to a purpose
- based on patterns across participants in deep research\*\*
- where any person might switch thinking styles based on life event or context

\* except when inner thinking is *caused* by personal demographic characteristics, such as discrimination, physiology, culture, environment

\*\* derived from problem-space listening sessions about people's purpose

## *What Are Thinking Styles and Why Do We Need Them?*

A style is a preferred way of thinking. It is not an ability, but rather how we use the abilities we have. We do not have *a* style, but rather a *profile* of styles. People may be practically identical in their abilities and yet have very different styles. But society does not always judge people with equal abilities as equal. Rather, people whose styles match those expected in certain situations are judged as having higher levels of abilities, despite the fact that what is present is not ability, but fit between those people's styles and the tasks they are confronting.

**Robert J. Sternberg, psychologist,  
*Thinking Styles*, Yale University, 1997**



the distinction between style & ability is crucial:

- ability refers to how well someone can do something
- style refers to how someone likes to do something

for example:

- ability to do the laundry
- style of doing the laundry
  
- ability to find a job
- style of finding a job

# thinking styles are used for

## strategy

figure out which path to take for our organization based on knowledge of who is thinking what as they pursue their purpose

- A. define metrics of support by thinking style + tower/block (layered on OppMap)
- B. realize who we are not supporting (recognize the narrowness of current solutions) (aligning org's capabilities beneath towers then doing gap analysis)
- C. prioritize who to support first/next/not (urgency based on who is being harmed) by thinking style + lens (discrimination, physiology, culture, environment)

## ideas & design

focus on diverse solutions based on knowledge of who is thinking what as they pursue their purpose

- A. create tailored/differentiated experiences by thinking style + lens (discrimination, physiology, culture, environment)
- B. track strength/weakness analysis of your solution over time, by thinking style
- C. frame other studies by thinking style (e.g. surveys, card sorts, usability tests, big data models, etc.) for cross-reference
- D. clarify the matrix of scenarios, with casts of characters based on different thinking styles

to make thinking styles

required:

framing your study, recruiting, and  
listening sessions

very helpful for validity of data:  
concepts & summaries

optional, but helpful to clarify summaries:  
cultivating patterns

# typical problem space study timeline

frame study

recruiting

listening sessions

participant sketches

transcripts

concepts & summaries

cultivate patterns

thinking styles

layer MMD

align capab.

gap analysis

priorities strategy

job stories

purpose metrics

hypothetical placeholder thinking styles  
(if not already researched)



draft thinking styles  
(validated after 2<sup>nd</sup>  
and 3<sup>rd</sup> studies)

the problem w/personas (but not all of them)



**Megan Davis**

Narrative Strategy | Storytelling For Innovation Framework | Divergent Thinker |  
Speaker

43 articles

+ Follow

you are in this  
course possibly  
because you share  
this person's distrust

I have a confession to make. When I first learned the process of creating a persona, I was really confused. I felt completely lost. Five years ago at my first design thinking class, my team started the process of synthesising and creating insights from our interview research. We started creating quotes based on the interviews that represented some dominant thoughts and feelings on the problem space we were exploring.

We listed the pain points and the pleasure points and mapped out what the persona was thinking and feeling. Then we started building out deeper insights. What did this persona need, that they may not even understand themselves?

I was feeling a bit lost. As an actress, a person who is trained in creating representations of real people, I knew I didn't have the right information in front of me. If I had to play this persona as a character I would have no idea how to do it. I would not understand how to build dialogue that reflected how this person would see themselves and the world. I would be completely at a loss. And to compound the confusion, the rest of my team seemed confident to build deeper and deeper insights.

see also: Mike Leigh's  
film Happy-Go-Lucky



DESIGN BEYOND DEVICES  
Creating Multimodal, Cross-Device Experiences  
by CHERYL PLATZ  
Foreword by Erika Hall



Cheryl Platz,  
*Design Beyond Devices*

## Capturing Customer Context

Blending Theatricality with Design  
Storytelling for Design  
The Building Blocks of Storytelling  
Story as Shared Understanding  
Apply It Now

20  
23  
25  
36  
39

also an actor  
also complains about most personas

compelling way? ensure that you're literally inventing new experiences, and creating a compelling story in a way that is compelling to the audience. Improvisational actors face a similar contextual challenge, amplified through the lens of time. They are creating a story on the fly. All decisions that will make their characters and scenarios engaging must occur in real time. In professional improvisation, the added pressure created by a paid audience means that actors are strongly motivated to ensure that their improvised stories are compelling (at least, more often than not).

To become skilled at making compelling theatrical decisions on the fly, improvisors learn about storytelling. They experiment with story structures. And in many cases, they agree upon shared storytelling frameworks to make it easier to evaluate their work and to work at speed with their peers.

If improvisors can learn to create compelling stories in real time, just think what stories you'll be capable of, armed with more than five minutes and an armful of customer research!

### NOTE MY IMPROVISATIONAL BACKGROUND

I've been a professional improvisational performer and instructor for over 15 years, most of which I've proudly spent in the ensemble of Seattle's Unexpected Productions in the historic Pike Place Market. The more you practice improv, the more gratitude you develop for the way that improv teaches you to do the following:

- Accept any new question or offer as a gift, not an adversary.
- Explore perspectives different from your own.
- Tell stories—from documents to presentations—with a clear arc, crisp narrative structure, and confident presence.

Plus, it's often ridiculous fun. I'd strongly recommend it for designers looking to improve their craft in an unexpected way.

### Storytelling for Design

Why storytelling? Why now? In 2007, with the arrival of the iPhone, the average human relationship with devices began to change. Suddenly, interactions were occurring more frequently outside the home and office. The specifics of the customer's story in the moment became much more important.

- Where is your customer?
- What is their objective?
- Who is around them?
- How do they respond to the world around them?

The challenge has become more pointed in recent years. Not only are customers not sitting at a PC, but they might not even be in eyeshot of a screen at all! With a wider range of potential customer needs, objectives, and contexts, the storyteller's burden on designers becomes even greater.

Luckily, you don't need to tell brand new stories in real time. And in an ideal world, you even have source material to draw from: your user research. But like actors, you do have an audience: your peers and stakeholders. And that audience is unlikely to be quite as connected to your customers as you are. It's not practical to replay every customer interview for them. You are the storyteller.

And here's the big secret about storytelling in design: *storytelling is design*. The process of selecting what to include and what to exclude in your story is a design decision. You're asking important questions and identifying where you might not have answers, where you might be making assumptions, and where your key insights lie.

### The Building Blocks of Storytelling

A large part of improv training and rehearsals revolves around creating mental "muscle" memory around story structure, in pursuit of better storytelling in the moment.

Some improvisors, myself included, use a shorthand for these building blocks of story: CROW, which is an acronym for *character*, *relationship*, *objective*, and *where*. The more developed these elements become, the more compelling the resulting scene will be. Not

## the problem with (most) personas

1. marketing informed heritage
2. make-believe details
3. the same persona (with different demographics)
4. role-based assumptions
5. horoscope-like usage
6. solution specific (blinkered by the org's solutions)



# dual heritage of personas

marketing informed

Cooper/Goodwin  
informed



personas

Reading your customer's minds isn't as sinister as it sounds. You can do this effectively, safely, and with zero hypnosis experience. *It's called the **persona**.*

A **persona in commerce** is defined as "the ideal visitor you want to have take a specific action on your site." The most popular way **for digital marketers** to shape personas is by using demographic characteristics such as age, income, location, gender, etc.

Look at how those personas define the ideal customer. They are focused. They're not going after "men, aged 35-45." They're going after *James, 37* who lives in San Francisco, and likes to watch *Friends*.

A persona needs to be specific because your product is specific. A persona needs to be specific, because you aren't trying to sell to a mass of incoming search traffic. You're **trying to sell a product** to the customer who needs and wants it.

Your persona can be as detailed and as visual as you want.

Different analytics platforms **including Google Analytics** can help you understand your customer demographics in order to make better marketing decisions.



YES, I WANT MORE TRAFFIC

# 7 Things You Should Learn From The Customer Who Doesn't Convert

Home » Blog » Conversion Rate Optimization » 7 Things You Should Learn From The Customer Who Doesn't Convert

Everyone hates [shopping cart abandonment](#).

It's the boogeyman of Internet marketing, the nemesis of conversion optimizers, and the headache of Internet sales. We fight it tooth and nail. We test incessantly. We optimize, reoptimize, and re-reoptimize, trying to defeat the rising tide of abandonments.

But for all our frenetic battles against shopping cart abandonment, could it be that

Do you want **more traffic?**

Hey, I'm Neil Patel. I'm determined to make a business grow. My only question is, will it be yours?

Your website URL

CONTINUE

# dual heritage of personas

## marketing informed

to make people aware of a product: define where the “market segment” will come across an ad

this is done using  
**big data + answers to surveys**

good results = enough people saw the message that an expected percentage acted on it ... don't know why

## Cooper/Goodwin informed



personas

# dual heritage of personas

## marketing informed

to make people aware of a product: define where the “market segment” will come across an ad

this is done using  
**big data + answers to surveys**

good results = enough people saw the ad  
... don't know why

## Cooper/Goodwin informed

to make a solution that people can use: define what they need

this is done using  
**qualitative research (generative & evaluative)**

good results = represent possible users & buyers



personas

# marketing informed

# choosing a college

# Cooper/Goodwin informed



**Lily & Ken**  
Lower Grade Point Average (less serious)



**Robert**  
Higher Grade Point Average (serious student)




**Georgia**  
Older Student (lots of other life experience)



**Michael**  
Low-Income (worried about paying)

**SAMPLETON UNIVERSITY**



**Kelly Riggs**  
High School student/athlete seeking a degree in communications and sports broadcasting.

*“ I've been researching various programs that will allow me to explore Communication majors with possibilities to maintain an emphasis on broadcast sports. I want stay relatively close to home – and want to visit campus and hear more about financial aid opportunities before I make a decision. ”*

<b>age</b> 17	<b>location</b> Arlington, MA	<b>grade</b> Junior	<b>parent occupations</b> Lawyer, Middle School Teacher	<b>siblings</b> 2 Younger Brothers
------------------	----------------------------------	------------------------	------------------------------------------------------------	---------------------------------------

**Key Decision Factors**

- Do they have programs of my interest?
- Underlying student experience
- Can I afford the school?
- Does it feel right? Can I fit in?
- Proximity to home
- Interaction with faculty and other students in her major of interest

**Tasks: Need to Find**

- Specific major/program info
- Financial aid and scholarships info
- Campus tour, application

**Why choose Sampleton?**

- Location (proximity to Hometown)
- Lack of awareness of overall relevant programs and opportunities
- Perceived quality of education at other Admission overlap schools
- Location perception

**Delighters**

- Interactive chat with counselors
- Student blogs
- Mobile website content experience
- SMS scheduling updates
- Interact with content (bookmark, share, send, save)


**Table Stakes**

- Key admission lifecycle information (e.g. why S.U., outcomes information, address common objectives, etc.)
- Student and faculty profiles
- Compelling visual design
- Objective choosing a major guide
- Support in understanding affording an S.U. education

**Potential Barriers**

- Lack of awareness of overall relevant programs and opportunities
- Perceived quality of education at other Admission overlap schools
- Location perception

**primary devices**  
iPhone, Laptop, Family's Tablet



**Technical Proficiency**

Low  High


**Content Knowledge**

Low  High


**Awareness of Sampleton University**

Low  High

**contributing factors**  
**On-Campus Student Life**



**competing schools**  
Quinnipiac University  
The University of Connecticut  
Connecticut College



**SAMPLETON OBJECTIVES/GOALS**

- Generate awareness for the excellent programs available
- Chosen over other Admission overlaps
- Recognized for quality education
- Co-curricular and service opportunities seen as benefit and difference

Source: Cal State East Bay, via Indi's memory

Source: <https://www.theprimacy.com/blog/why-personas-matter-in-higher-education-and-how-to-bring-them-to-life-on-your-website/> CC BY-NC 4.0 INDI YOUNG

38

# the problem with (most) personas

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**invented**

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# Cooper/Goodwin informed

# choosing a college



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“ I've been researching various programs that will allow me to explore Communication majors with possibilities to maintain an emphasis on broadcast sports. I want stay relatively close to home — and want to visit campus and hear more about financial aid opportunities before I make a decision. ”

<i>age</i> <b>17</b>	<i>location</i> <b>Arlington, MA</b>	<i>grade</i> <b>Junior</b>	<i>parent occupations</i> <b>Lawyer, Middle School Teacher</b>	<i>siblings</i> <b>2 Younger Brothers</b>
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**Key Decision Factors**

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**Potential Barriers**

- ✗Lack of awareness of overall relevant programs and opportunities
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- ✗Location perception

**primary devices**  
iPhone, Laptop, Family's Tablet



**Technical Proficiency**

LOW HIGH

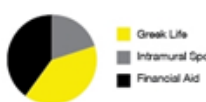
**Content Knowledge**

LOW HIGH


**Awareness of Sampleton**

LOW HIGH

**contributing factors**  
**On-Campus Student Life**



**competing schools**  
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The University of Connecticut  
Connecticut College



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Source: <https://www.theprimacy.com/blog/why-personas-matter-in-higher-education-and-how-to-bring-them-to-life-on-your-website/>

CC BY-NC 4.0 INDI YOUNG 41

# What Is A User Persona?

A user persona is **a fictional representation of your ideal customer**. As a UX designer, you'll start the design process by conducting user research—**building empathy** with your target users and identifying exactly what they need from the product you're designing. A persona is generally based on this user research and incorporates the needs, goals, and observed behavior patterns of your target audience. Check out the example below:

## Janet - The Family Planner CF



### Janet's Goals and Needs

- Janet wants to plan a trip full of positive memories for her children.
- She feels like she can plan the logistics, but that she needs help with figuring out what family activities to do once she reaches her destination.
- She needs something easy to use, she doesn't feel like she has time to work with complex apps.

### Janet's Motivations

- Her main motivation is to create memories for her family.
- To get ideas for family activities while on an upcoming family vacation.
- To find activities that will keep her children busy and happy.




### Janet's Everyday Activities

- Get the kids out of bed and get them ready for school in the morning.
- Run errands with the non school-aged kids, shopping, lessons, and pre-school.
- Scheduling playdates and meetings with other parents and friends.
- Changing diapers, cleaning, making lunch, and tons of other small tasks!

### Janet's Device and Internet Usage

Desktop devices	<input type="range"/>
Mobile Devices	<input type="range"/>
Social Media	<input type="range"/>
Technical Know-how	<input type="range"/>

### Janet's Vital Statistics

-  Janet is a 38 year old married female living in Berlin, Germany.
-  Janet is the mother of 4 children, aged 1 to 10.
-  Janet lives a busy life, and is often on the go.

## Constant curiosity: Ask what, how, and why?

Throughout the empathise phase, you should constantly be considering the what, how, and why of your users' behaviour. The what-how-why framework can help you translate your (assumption-free) observations into more abstract user motivations. Divide your page into three sections and break down what you've observed as follows:

- **What?** Refers to the details of what has happened: for example, the user took the following actions when entering their payment details on an ecommerce website.
- **How?** Here you will consider how the user has completed these actions. What were their facial expressions? Were they exerting a lot of effort? Did they seem at ease, frustrated, or confused?
- **Why?** Now it's time to make some educated guesses about the user's motivations and emotions as they complete these tasks.

The more you reflect on how and why your users might behave in a certain way, the more you can empathise with (and design for!) them.

**Christina**  
Moletti

*Freelance Graphic Designer*



**"Living life is a creative process too"**

- Has enough money but not much more
- Works hard during the day but on her own hours
- Walking is her main way to travel, day or night

### Personal Information

**Age:** 25

**Location:** Pittsburgh, PA

**Education:** BA Graphic Design NC State University,

**Profession:** Freelance Graphic Designer,  
Part-Time Student

**Home life:** Lives with a roommate (Eva 25),

**Hobbies:** Playing guitar and xylophone, reading,  
drawing, sewing, watching movies, sleeping

**Favorite TV shows:** Doesn't watch much TV

**Personality:** Easygoing, outgoing, try new things

### User Goals

*Christina uses this information system to...*

- Give her reasons to go out walking at night
- To be active and aware of her surroundings at night
- To find the safest places to go at night
- Make walking and being out at night more social with her friends

**Maria**  
Nantes

*Newspaper Editor*



**"I want to stay healthy both mentally and physically always"**

- Health Conscious
- Use basic technology for day to day activities
- Enjoy Social groups

### Personal Information

**Age:** 31

**Location:**

**Education:** Master's in English from U of Michigan

**Profession:** Newspaper Editor

**Home life:** Married, no children

**Hobbies:** Walking, making friends, Yoga

**Favorite TV shows:** Desperate Housewives

**Personality:** Outgoing, Passionate, Social,  
Cheerful, Sophisticated

### User Goals

*Maria uses this information system to...*

- Connect and coordinate with friends
- Find safe walking routes at night
- Get a sense of safety by getting more info
- Find out about social events taking place at night, which might be of potential interest
- Wants to get emotional and mental relaxation by walking

**James**  
Goeffsner

*Senior Engineer*



**"I know what I'm doing, I'm willing to try everything new."**

- Is willing to spend money on that
- Likes to chat with others online
- Knows that health is very important & work out

### Personal Information

**Age:** 37

**Location:** San Francisco, CA

**Profession:** Cellphone Interface Developing

**Education:** Master's

**Home life:** Single

**Hobbies:** Surfing online to look for new electronic products, working out at gym

**Favorite TV shows:** Friends, Heros

**Personality:** knowledgeable in popular stuffs,  
talkative, keeping things on schedule

### User Goals

*James uses this information system to...*

- Stay ahead of latest trends on mobile devices
- Take more time to walk as the substitute for exercise
- Meet new friends through this application
- Feel free to walk at night
- Discuss the new interaction
- Try to figure out a method for socializing and also provide a feeling of security

**invented**

*“I agree that people put all sorts of irrelevant crap into their personas. It dilutes their credibility ... Demographics are seldom necessary when it comes to designing structure and flow.” Kim Goodwin*

## the problem with (most) personas

1. marketing informed heritage
2. make-believe details
3. the same persona (with different demographics)
4. role-based assumptions
5. horoscope-like usage
6. solution specific (blinkered by the org's solutions)

causes unnecessary work + confusion  
for teams during ideation & design

**Christina**  
Moletti

*Freelance Graphic Designer*



**"Living life is a creative process too"**

- Has enough money but not much more
- Works hard during the day but on her own hours
- Walking is her main way to travel, day or night

### Personal Information

**Age:** 25

**Location:** Pittsburgh, PA

**Education:** BA Graphic Design NC State University,

**Profession:** Freelance Graphic Designer, Part-Time Student

**Home life:** Lives with a roommate (Eva 25),

**Hobbies:** Playing guitar and xylophone, reading, drawing, sewing, watching movies, sleeping

**Favorite TV shows:** Doesn't watch much TV

**Personality:** Easygoing, outgoing, try new things

### User Goals

*Christina uses this information system to...*

- Give her reasons to go out walking at night
- To be active and aware of her surroundings at night
- To find the safest places to go at night
- Make walking and being out at night more social with her friends

**Maria**  
Nantes

*Newspaper Editor*



**"I want to stay healthy both mentally and physically always"**

- Health Conscious
- Use basic technology for day to day activities
- Enjoy Social groups

### Personal Information

**Age:** 31

**Location:** Ann Arbor, MI

**Education:** Master's in English from U of Michigan

**Profession:** Newspaper Editor

**Home life:** Married, no children

**Hobbies:** Walking, making friends, Yoga

**Favorite TV shows:** Desperate Housewives

**Personality:** Outgoing, Passionate, Social,

Organized, Detail oriented

### User Goals

*Maria uses this information system to...*

- Connect and coordinate with friends
- Find safe walking routes at night
- Get a sense of safety by getting more info
- Find out about social events taking place at night, which might be of potential interest
- Wants to get emotional and mental relaxation by walking

**James**  
Goeffsner

*Senior Engineer*



**"I know what I'm doing, I'm willing to try everything new."**

- is willing to spend money on that
- Likes to chat with others online
- Knows that health is very important & work out

### Personal Information

**Age:** 37

**Location:** San Francisco, CA

**Profession:** Cellphone Interface Developing

**Education:** Master's

**Home life:** Single

**Hobbies:** Surfing online to look for new electronic products, working out at gym

**Favorite TV shows:** Friends, Heros

**Personality:** knowledgeable in popular stuffs, talkative, keeping things on schedule

### User Goals

*James uses this information system to...*

- Stay ahead of latest trends on mobile devices
- Take more time to walk as the substitute for exercise
- Meet new friends through this application
- Feel free to walk at night
- Discuss the new interaction
- Try to figure out a method for socializing and also provide a feeling of security

these are the same goals



**B) Kailee — 20 years old, Hendron Kentucky**



**these are the same goals**

Kailee is from a low income bracket. She is a single mother. The father left the area three years ago and does not contribute child support. Kailee lives in her aunt's house, along with her unemployed mother. She contributes to the rent with the money she earns at her part time job at Walmart, which is 20 miles away. Kailee likes her co-workers at the store, but doesn't like that it's such a long drive. The toddler and everything else leave her little time, so she takes night classes when she can at the local community college. She also applied for the campus daycare option that is available for low-income students, and was recently accepted. She found out about the campus daycare in one of the newsletters that she received as a student. She loves kids and wants to open a daycare herself some day. She has been taking night classes for two years.

**D) Anthony — 19 years old, Elizabethtown Kentucky**



Anthony is from a low-income bracket. He knew college was the next step for him, but he didn't know what to study. He saw a college counselor to help him decide what career to aim for. He is good at math so the counselor suggested bookkeeping. He has been taking classes toward this goal for a year, and he likes his professors. He gets along with his classmates and enjoys attending study sessions with them. But he's gone to see the counselor again because bookkeeping doesn't seem like it would let him be around people much for his job. He likes being with people and helping them out.



Marianne

classic service level



Lauren

silver service level



Dr. Samuel Smith

platinum service level

based on # of transactions, instead of  
philosophy toward investment

demographics very similar ...  
and subject to unconscious bias

*“One client used a photo of a young blonde-haired woman. That persona would get dismissed as ‘The Blonde.’” Sophie Dennis*

all three personas appeared equally in these mental spaces:

Form Understanding of Investing

Form Investment Goals, Plans

Get Assistance with Buy/Sell Decisions

Have Confidence Making Buy/Sell Decisions

Enact Buy/Sell Decisions

Monitor Investments

Calculate Yearly Taxes

Manage Personal Information

Administer Funds

these are the same goals ...  
difference only in # transactions

two different philosophic approaches to investing  
(from that initial study):

“too much information to make solid decisions”

“it’s working as I expected”

support these two thinking styles differently

# the problem with (most) personas

1. marketing informed heritage
2. make-believe details
3. the same persona (with different demographics)
- 4. role-based assumptions**
5. horoscope-like usage
6. solution specific (blinkered by the org's solutions)

# JUDY WILSON



## PROJECT MANAGER

**Age:**  
**Status:**  
**Location:**  
**Tier:**  
**Bio:** Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

### MOTIVATIONS

- Lorem ipsum dolor
- sit amet, consectetur
- adipiscing elit, sed
- do eiusmod tempor
- incididunt ut labore

### FRUSTRATIONS

- Lorem ipsum dolor
- sit amet, consectetur
- adipiscing elit, sed
- do eiusmod tempor
- incididunt ut labore

### GOALS

- Lorem ipsum dolor
- sit amet, consectetur
- adipiscing elit, sed
- do eiusmod tempor
- incididunt ut labore
- it amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore

### TECH

- Lorem ipsum dolor
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- adipiscing elit, sed
- do eiusmod tempor
- incididunt ut labore
- it amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore

### INFLUENCE

- Lorem ipsum dolor
- sit amet, consectetur
- adipiscing elit, sed
- do eiusmod tempor
- incididunt ut labore
- it amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore

# FRANK SCOTT



## PRODUCT DESIGNER

**Age:**  
**Status:**  
**Location:**  
**Tier:**  
**Bio:** Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

### MOTIVATIONS

- Lorem ipsum dolor
- sit amet, consectetur
- adipiscing elit, sed
- do eiusmod tempor
- incididunt ut labore

### FRUSTRATIONS

- Lorem ipsum dolor
- sit amet, consectetur
- adipiscing elit, sed
- do eiusmod tempor
- incididunt ut labore

### GOALS

- Lorem ipsum dolor
- sit amet, consectetur
- adipiscing elit, sed
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- incididunt ut labore
- it amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore

### TECH

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### INFLUENCE

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- incididunt ut labore
- it amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore

# JUDY WILSON



**PROJECT MANAGER**

Age:  
Status:

# FRANK SCOTT



**PRODUCT DESIGNER**

Age:  
Status:

not all project managers  
product designers

have the same thinking style

not all project managers  
product designers

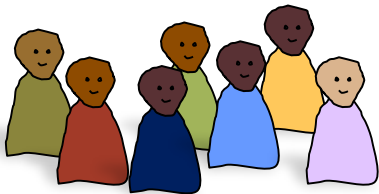
are in the same context



# a few “bug-finder” thinking styles (software developers)

## doing it the right way

I know the “right method” to figure this out. I prefer to work independently of groups, though I will guide others to the answer. I love showing my finished work to others, and am proud of innovations I came up with.



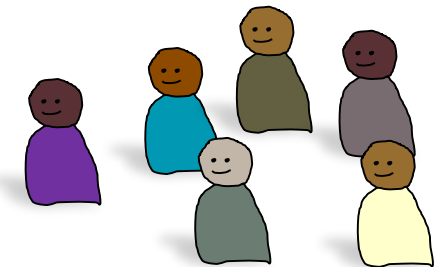
## many answers & perspectives

I’m certain people around me have the answer and I seek their input, and help them in kind when I can. I explore all the solutions out there because I don’t think there is one “right way.”



## respected expert

I’m confident that I can figure this out. I’m expert at this area, after all. Others come to me for the answer. I am an elegant coder and teach others what I know without any ego.



## but what about B2B?

**example:** IT administrators – typically divide the customers by whether they have a simple vs complex network

### look by purpose

a large network may have extra communication issues and larger teams than a small network; are just extra pieces

### example approaches to their purpose

**live-and-let-live:** let's get the minimum working, and I'll fix thing as they come up

**make this perfect:** I'll spend late nights and weekends trying to get this right for rollout, so nothing goes wrong

# the problem with (most) personas

1. marketing informed heritage
2. make-believe details
3. the same persona (with different demographics)
4. role-based assumptions
5. horoscope-like usage
6. solution specific (blinkered by the org's solutions)

## What About Me?

I know what I like. I expect systems and procedures to work smoothly. My money and my time are precious. I believe in delivering what I have promised. I seem to have higher standards than some others; I have good taste. It seems like I always have to fight to get what I paid for. I work hard to find the flights that I need, navigating between airlines and times of travel and prices. I'm glad I know how flying works so that I can get what I want. Comfort is important to me. I focus on the rewards of being loyal so that I can upgrade myself when possible. When I see someone getting better treatment than I am, then I'll stand up and say something. I don't like changing my plans, so I try to get my plans perfect in the first place. If my plans get changed out from under me, then I am likely to get upset and probably complain to someone, even though I doubt that the person actually wants to help me in the situation.

same personality for all aspects of their life??!

- Dislikes being thwarted.
- Often audibly expresses displeasure - sighs, groans, complaints.
- Are comfortable telling strangers how unsatisfactory something has been.
- What about me?

### Outside of the booking experience:

- Might honk, yell and gesture in a traffic jam.
- Grumbles about long lines at the checkout stands to others waiting in line.
- Might have an unhappy attitude, thinking other people are having a better experience.

### Bargain Hunter



**Allison 38**  
Paralegal Manager  
Divorced, living with two daughters in Westchester, NY.

She always looks for the best deal on her regular flights to Scottsdale.

### Almost Elite



**Ethan 25**  
Member of Tech Staff  
Software Engineer  
Single, living outside Palo Alto, CA.

He is going to Tokyo for a conference, but isn't a very experienced flyer internationally.

### Road Warrior



**Robert 45**  
Salesman, Cogswell Cogs  
Lives with wife and two kids in a Washington DC high-rise.

He remembers when air travel was better and he'll tell you about it.

*"I'm not the only one; there were at least 10 or 12 people who had also been stranded and all of us ended up getting to LAX through different routes."*

**not horoscope:** different guiding principles for different contexts

purpose: driving a car

- Choreography – being aware of all my partners are moving on the road, including pedestrians, is how we all can “dance” together with grace, doing no harm
- Winner! – just like a game, if I get ahead of others, go around obstructions, and get there a tiny bit faster, I win

context: going to visit friends for dinner

context: commuting to work

context: driving my daughter, who missed the bus, to the airport on time to meet her team to fly to the championships

## the problem with (most) personas

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*we make*  
**the world**  
*we live in*  
*and*  
*shape our own*  
**environment.**  
Orison Swett Marden





there were 3 main personas:

exercising – yoga, running

office worker – hydrate!

medical condition – doctor says hydrate!











 **CBS** THIS MORNING

# Lessons From Flint: Clean Water is Everyone's Right

By FIRDAWS HAKIZIMANA • SEP 23, 2018



When I was about twelve, my mom and I had stopped at Target and got a Brita water dispenser. It wasn't particularly large; it should have held about 18 cups worth of water. But, the thing is, when we went through the box once we were home, there was something I wasn't expecting: a thin cobalt blue, small, electronic device. A water tester.

Suddenly, I realized why my mom was willing to spend \$30 on a fancy pitcher.

The thing is, during the week prior, my family had watched a large collection of documentaries about water; we started

# awareness of unconscious bias

demographics rarely *cause* reasoning

demographics rarely *cause* reasoning

except:

in reaction to **discrimination**

because of **physiology**

associated with **culture**

in reaction to surrounding **environment**

for example:

I **cannot see well** and am navigating **this busy sidewalk** without causing undue harm to anyone or to myself, like that embarrassing time a couple of months ago.

I just got **a rejection email** from the conference organizers, and I'm wondering if it's the subject of my talk or if it's **because I'm a black woman**, and I wonder how to find out.

I **shouldn't go for that promotion** at work, and just **keep my head down**, because **as an immigrant my English isn't good enough**.





Applause from Livia Labate, Dave Malouf, and 750 others



Indi Young

Freelance problem space researcher helping digital clients find opportunities to support diversity; author & speaker; [www.indiyoung.com](http://www.indiyoung.com); cofounder Adaptive Path

Mar 14, 2016 · 21 min read

## Describing Personas

\*

People seem to fall into a hole when writing personas, even when they're doing it based on research: they use demographics to divide between segments and to represent thinking styles. This is a problem. So, to start, here's a little quiz. Below are four personas representing the types of people community and technical colleges want to support better. Which of these descriptions helps you understand these people at a meaningful level?

### A) A Better Life

\*

Growing up, I saw the struggle my mom went through—finding a job, searching for places to live that we could afford, putting everything into her job for years only to be let go because her boss was paranoid. We lived with my grandparents after that, because Mama was a broken person. I wanted her to feel better, so I offered to do work around the house for grandma so that Mama wouldn't feel so guilty about staying there. Then I got a job and my own

2.3K

36



**Jared Spool** @jmspool · 14 Aug 2018



If you truly want inclusive personas, having them built based on diverse research by a diverse team is the way to go.

When you do that, you don't need to worry about diverse demographics listed in the persona descriptions.

Your team can just tell the stories of what y'all saw.





**Jared Spool** @jmspool · 13 Aug 2018



Not about being redundant. Harmful to the work.

See [@indiyoung](#)'s piece:



### **Describing Personas – Indi's Essays – Medium**

Author's Note: A handbook on this topic will be published in late 2019. I'm thinking of calling it Assumptions Aside: Creating more...

[medium.com](https://medium.com)





# Bad Form

Our Research Platform Excluded People Based on Gender Identity. Here's How We're Fixing It, and What We've Learned.



## a positive example: dScout

- decided that binary gender question for their recruits (scouts) was not in keeping with progress
- researched how to ask about gender
- they no longer allow clients asking for research recruits to select by gender
- “question the question.”

## Bad Form

Our Research Platform Excluded People Based on Gender Identity.  
Here's How We're Fixing It, and What We've Learned.

# Your personas probably suck. Here's how you can build them better.



Amber Westerholm-Smyth

Follow

Jul 3 · 17 min read



Personas. Maybe you love them. Maybe you hate them. Either way, you've probably concluded at some point in your career that your current personas are failing you.

It's pretty much accepted that the concept of personas is a key tool in a user researcher's professional tool kit. UX researchers have done such a good job of embedding the idea that empathy-building is critical to developing a successful product, that stakeholders cry out for another persona-driven deliverable.

So why do you feel like the skill of creating valuable personas; personas that actually resonate with the users we know, love, and advocate for, is a dark art that you can't conquer. Why has the tool of personas transitioned from being the go-to output to a concept that ruffles the feathers of most UX Researchers?

**Personas are  
Dead, Long Live  
Personas!**

Stop persona  
disillusionment.  
Learn how to build  
personas with  
intergrity!

Follow



Using all of this research, we took a long hard look at that template and we came up with a seismic shift.

Good personas don't have heuristic shortcuts that drive biases. The time has come for personas with:

- No ages
- No photographs
- No salaries
- No names
- No genders

This may be quite shocking to a lot of people. It's rare to see personas like this, and you might be thinking if I don't have any of that, what am I going to put on my personas!?

We want you to:

- Focus on your users as people, not what defines them in a census.
- Allow the depth of data and richness of insights to flourish. Humans are complex.
- Stop letting people judge your personas by their cover, strip out looks

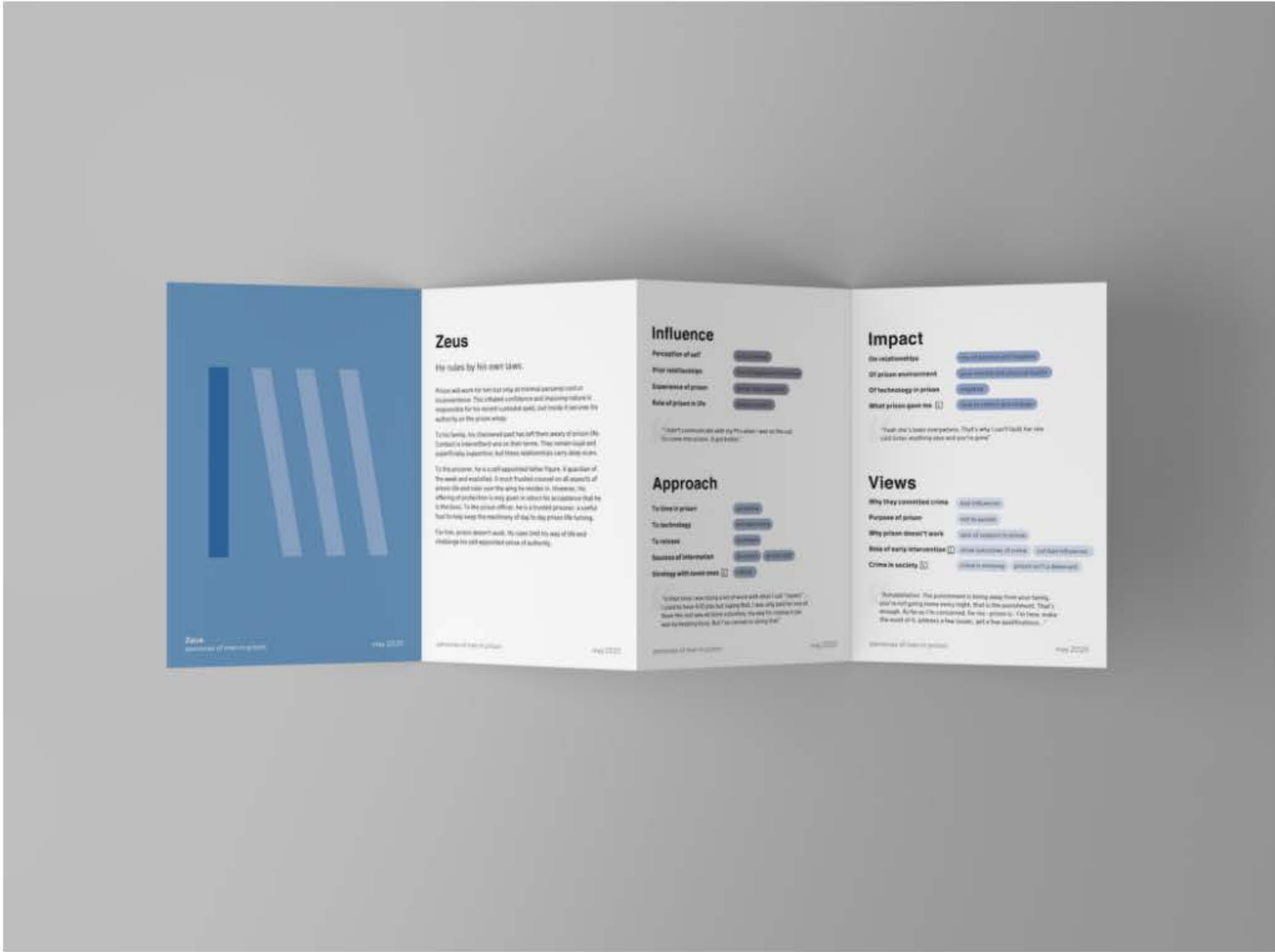
# Personas are Dead, Long Live Personas!

Stop persona disillusionment. Learn how to build personas with intergrity!

Follow

👏 132

💬 3



Mockup of what one of our personas looks like

Source: Amber Westerholdm-Smyth, Ministry of Justice, UK; article in 2020, <https://medium.com/uxr-content/your-personas-probably-suck-heres-how-you-can-build-them-better-b2b32a45c93b>





“ If you import someone else's data, you import someone else's mistakes. ”

Goals

- + Keep the big pile of money piling up
- + Be able to retire with houses in New Delhi (family) and San Jose
- + Beat the market through research

How we can help Jay

- + Help him get concrete with his goals
- + Provide thorough background for every suggestion for him to research
- + Help his conversations with his father-in-law and wife

Jay, 51  
Policy Lawyer  
Lives in San Jose, married, 3 kids, \$2.7 mil net worth

# good data ... but ... demographics



“ I've got a lot going on, and a lot I'm going to accomplish in my life, for me and my daughter. ”

Goals

- + Spend as little time on finances as possible
- + Have the wedding she always wanted
- + Pay for her daughter to complete college debt free
- + Retire and have the option to settle wherever she wants

How we can help Megan

- + Give her tools for on the go
- + Stay ahead of the complexity of her finances
- + Keep her on track with her savings

Megan, 40  
Fashion Photographer  
Lives in Brooklyn, divorced but remarrying, 1 child, \$375k net worth



“ I would rather break my snowboard than think about investing, but what are you going to do? ”

Goals

- + Make the right financial decisions
- + Save up for a down payment on a house
- + Pay off that last chunk of student loans
- + Put in the hours at work to get a promotion and raise

How we can help Aaron

- + Teach him the basics
- + Catch up to targets
- + Establish good habits
- + Stay on track

Aaron, 29  
Social Media Manager  
Lives in St. Louis, single, \$10k net worth

# When It Comes To Personas, The Real Value Is In The Scenarios



by Jared M. Spool

*Personas without scenarios are like characters with no plot.* — Kim Goodwin

## The Stories Are Different. The Personas Are Not.

Neshar's story is very different from Taré's. The details we know about the personas of Neshar and Taré are not. And those details don't matter. personas become lifeless mannequins on a closet shelf that are rarely referenced.

The stories themselves are very contextual. In other parts of their journeys, knowing the differences between Neshar and Taré wouldn't matter.

## Personas Are Useful, But Scenarios Are More Useful

Taré and Neshar's stories didn't require personas. The difference in the stories was between the activities, not the people. In fact, it's possible Taré and Neshar

# HOW TO REDUCE BIAS IN YOUR UX PRACTICE WITH PERSONA SCENARIOS

By Patricia Rodriguez, July 15, 2019



Do a search for "personas" on the web and you'll get a smorgasbord of smiling faces of all ages and from all backgrounds - and top results are all related to design, user experience, and agile. Demographic-based and often marketing-driven, personas are pretty mainstream and relatable - except when they're not.

And like the web, personas are evolving.

In user-centered design (UCD), we design for people, rather than technology. And ideally, we design for the people who will use the thing we are making, instead of ourselves. So we have to get to know our users - and that's where personas come in handy. They are the synthesis of user research findings, into real-sounding people, with names, preferences, goals... all wrapped around demographic info to create a cast of characters to vet designs against so that we can try thinking from their perspective, not ours. It's a way of empathizing.

For marketing purposes, personas can be super-helpful, demographics and all. They can help one choose the best colors and messaging for example.

But for interactive design, are demographics helpful? Or do they create biases that do not reflect reality, and keep us stuck in the habit of stereotyping (and that includes subconsciously stereotyping)?

Are Ukrainian women over 70 living in Toronto all non-technical and unfamiliar with mobile devices?

No. (And I know this first hand.)

A while back, [Indi Young](#) (author of Practical Empathy) caused a stir by tweeting:



**Indi Young** @indiyong · 22h

Please remove age, gender, ethnicity, location from your personas. None of these things cause behavior/thinking. But they cause assumptions.

“woke” in terms of experience design means:

I try not to fall prey to **cognitive bias**

I recognize what **systemic bias** is

I aim for more goals than only **ROI**

I avoid using **demographics** to refer to a user

I am aware that my own **culture** is one of many

# example thinking styles

problem-space  
research informed

marketing informed

Cooper/Goodwin  
informed

personas

thinking-styles



go to the extreme of avoiding ALL demographics

- no personal names
  - later, a character name in a written scenario is okay
- no faces
  - an icon or graphic that is non-human is okay, but unnecessary
  - you could use a face for a character later in the written scenario

the name of the thinking style:

represents the core approach to the purpose that the group shares (like a philosophy)

is a name anyone in the group would be proud to use to describe themselves



# purpose: choosing a major

Passionate About the Topic	I had a previous experience/influence that really touched me. I feel that I have a gift or talent that I should develop.
Look Forward to the College Experience	I'm looking forward to independence, maturity, and being with a peer group in the same predicament. I'm interested in meeting new friends and exploring areas of interest.
Means to an End	I want to be level-headed and prepare myself for the future. It's key to make my future comfortable with a high-paying job.
Exploring Paths	I was told that college is the next best step for me, but I haven't decided what I want to do in my life. I will try out this major and see if I like it or if something else comes up.

# purpose: get through this near-miss accident

## Let This Be a Lesson

*If people are being careful, doing things according to guidelines, accidents should never happen. When an accident happens and the other person is at fault, I want to make sure that person becomes aware of the mistake he made so that he won't make it again and cause cost, extra work, and pain to yet another person. It's a "teachable moment". It would be great if my insurance company would convey the message so that I don't have to risk him lashing out at me. Conversely, if I am at fault, I make a change to my habits which I enforce over the next few weeks until it becomes reflex. I never want my bad habits, whether in my driving or my home maintenance, to cause any sort of setback.*

## Troubled About It

*I am afraid that this incident is going to cost me a lot—not only in terms of fixes, but also in terms of future costs and mental and emotional cost. How will I get through this? I don't want people to think of me as guilty, nor high-risk in terms of insurance. I will work at getting people to side with me and support me so that these costs are diminished and I can live with myself.*

## What Insurance Is For

*This is what insurance is for; it's not a big deal. Accidents happen, whether someone is to blame or whether it was an "act of nature". I don't want to argue about who is to blame. If the company asks for more and more documentation, pictures, and statements, then the process has gotten far too involved. Furthermore, because accidents happen, I expect my rates to remain the same. The insurance company ought to have done all the necessary calculations to ensure they can cover whatever will happen.*

# purpose: trying to lose weight

## Resigned

## Stressed




## Sidetracked

Gaining weight. Feeling stuck. It's easy to give up and just accept the way things are.

But you don't have to. Find a new approach to food and exercise. Learn how stress is connected to your weight. And get around the things that get in your way.

### Lessons

Choose a lesson to get started.



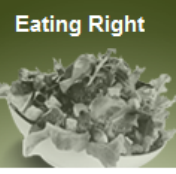


 <p>Emotions, Stress &amp; Food</p> <p><input type="radio"/> Start »</p>	 <p>Thoughts &amp; Self-Image</p> <p><input type="radio"/> Start »</p>	 <p>Feeling Stuck</p> <p><input type="radio"/> Start »</p>
 <p>Exercise Your Way</p> <p><input type="radio"/> Start »</p>	 <p>Eating Habits</p> <p><input type="radio"/> Start »</p>	

Simple healthy changes will help you lose weight and keep it off.

You lose a few pounds. Then you gain it back, again and again. There's a better way. Tips for healthy eating. Easy ways to work exercise into your day. Help with the things that trip you up. Get the tools and information you need to reach your healthy weight and stay there.

### Lessons

Choose a lesson to get started.







 <p>Making Diet Programs Work</p> <p><input type="radio"/> Start »</p>	 <p>Barriers and Slip-Ups</p> <p><input type="radio"/> Start »</p>	 <p>Eating Right</p> <p><input type="radio"/> Start »</p>
 <p>Food Habits</p> <p><input type="radio"/> Start »</p>	 <p>Getting Active</p> <p><input type="radio"/> Start »</p>	

You know how to lose weight. Here's how to make it stick.

You get busy. You get sick. Your family needs you. Normal life can throw off the best plans for weight loss. But if you're ready for setbacks, they won't stop you. Tips for eating out, planning meals at home, beating stress. You can put it all together, with a little help.

### Lessons

Choose a lesson to get started.

 <p>Eating In</p> <p><input type="radio"/> Start »</p>	 <p>Eating Out</p> <p><input type="radio"/> Start »</p>	 <p>Slipping Up</p> <p><input type="radio"/> Start »</p>
 <p>Beating Stress</p> <p><input type="radio"/> Start »</p>	 <p>Reaching for Your Goal</p> <p><input type="radio"/> Start »</p>	 <p>Staying Active</p> <p><input type="radio"/> Start »</p>

go to the extreme of avoiding ALL demographics

after careful consideration of how necessary it is,  
you can add back in one or two demographics for:

- discrimination
- physiology
- culture
- environment

# thinking styles are

- demographics-free\* archetypes representing different philosophic approaches to a purpose
- based on patterns across participants in deep research\*\* (not invented)
- where any person might switch thinking styles based on life event or context (not horoscopes)

\* except when inner thinking is *caused* by personal demographic characteristics, such as discrimination, physiology, culture, environment

\*\* derived from problem-space listening sessions about people's purpose

# problem space

person = has a variety of tools to apply

# strategy

bridge to other methods

# solution space

user = someone with a relationship/potential to your org



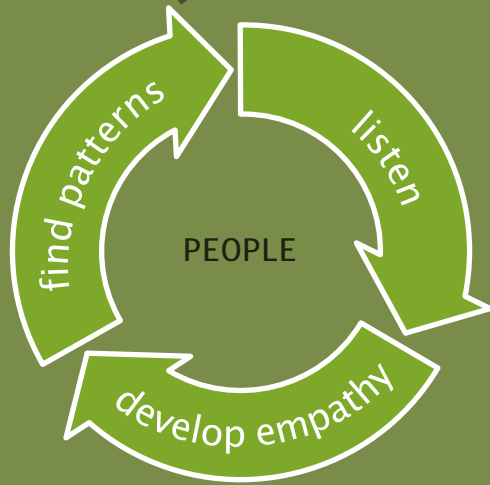
opportunity map (mental model diagram above/capabilities below)

thinking styles



opportunity backlog: JTBD, lean, agile, continuous dual track

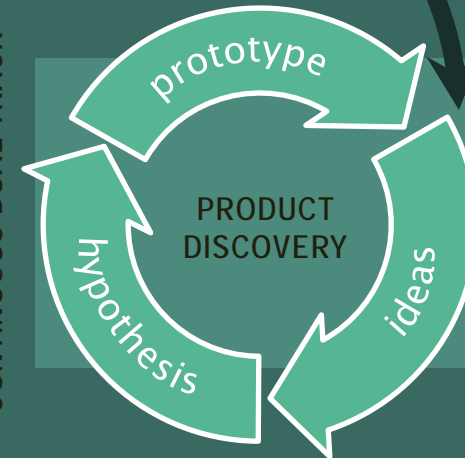
product strategy may have something to do with technology, but it has everything to do with people



maintain a single source of knowledge (and potential futures)

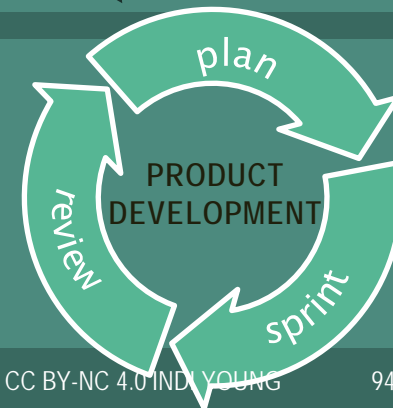
take time here once a year

CONTINUOUS DUAL TRACK



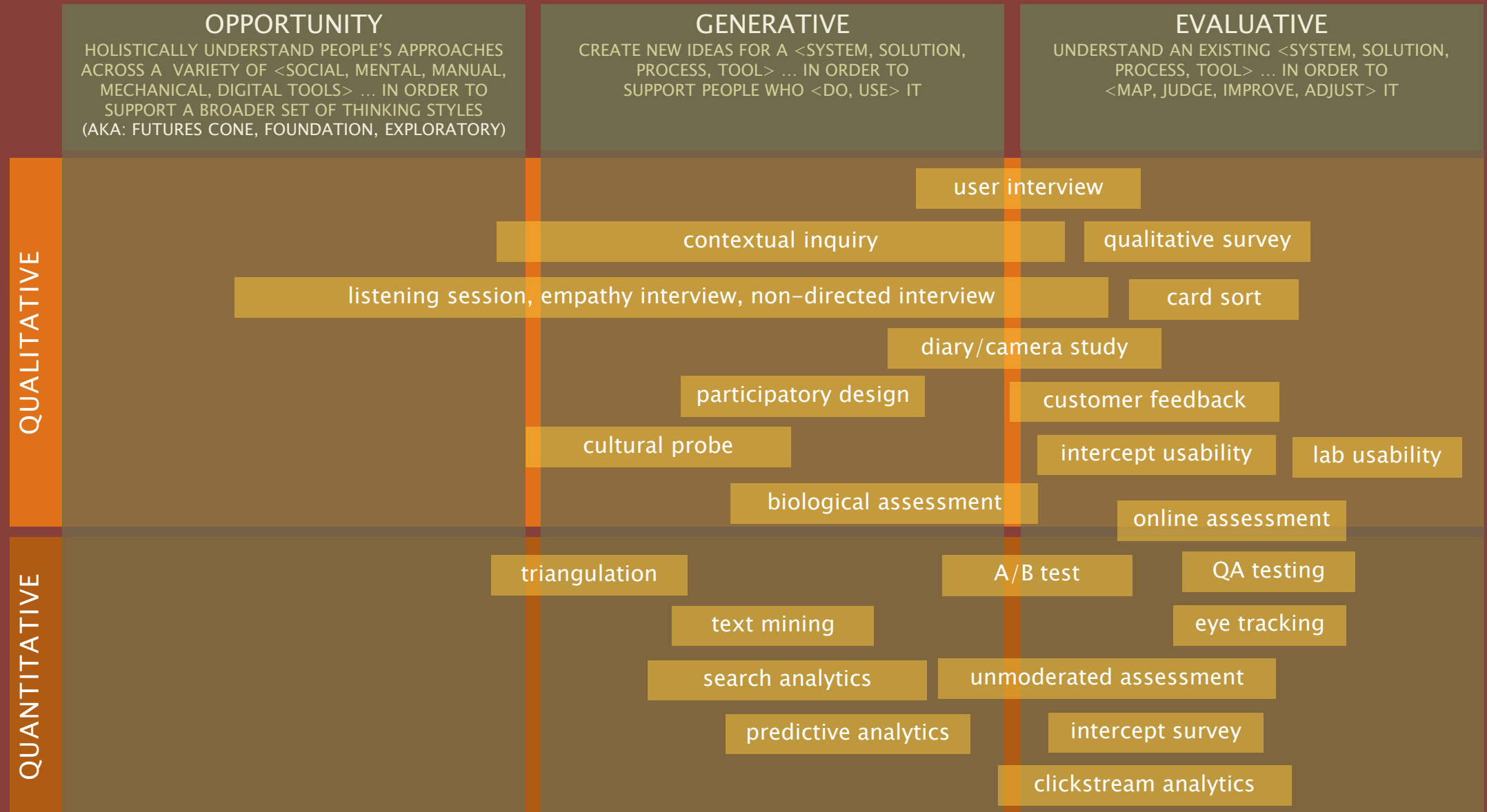
usually hurried

product backlog validated user story + prototype



## Frame studies by: PEOPLE'S PURPOSE

UNDERSTAND PEOPLE'S INNER THINKING, EMOTIONAL REACTIONS & GUIDING PRINCIPLES AS THEY PURSUE A PURPOSE



not to constantly update our personas  
frame by the purpose a person is pursuing

→ purpose-focused ←

a purpose is not a moving target based on  
technology that is shifting

the solution (lens of the solution) is not the point



# necessary data characteristics

follow wherever they go, even if it doesn't  
seem associated to the topic you asked about  
... because that is what is top of mind for them

cannot develop cognitive empathy up here

# typical conversation

## surface

explanation  
opinion  
preference  
statement of fact  
scene setting  
generalization  
conjecture

## social goals

banter to ease tension  
make them understand me  
make them feel better  
impress them  
make them laugh, jokes

## responding

giving direction  
warning  
advising  
persuading  
moralizing  
judging  
agreeing  
shaming  
analyzing  
probing  
reassuring  
distracting

## intentions

connect with the other person  
fix it for the other person  
disagree/debate  
plan an exit strategy  
space out  
question, probe

## depth

inner thinking  
emotional reactions  
guiding principles



cognitive  
empathy

# listening deeply to understand someone

**inner thinking** – active thought process at a time and place, whys & wherefores, decision-making, indecision

**emotional reaction** – emotion, feeling, that causes an action or decision or thought process

**guiding principle** – rule or foundational instruction for making decisions

## dive in deeper:

1. micro-reflection
2. find the root
3. pin to a place & time
4. turn passive into active
5. the importance of silence

## Demo Listening Sessions

Want to see/hear what a listening session is about?

Here are three recordings from three different listening sessions. The first is a recording of a listening session I did with a client. The podcast is at [Design Thinking 101, hosted by Design Thinking 101](#), hosted by a one-pager, transcripts, recordings, and other materials.

...their own style to listening deeply, and it's important to embrace that. I talk through the details of these demo listening sessions. And here is

**listening session:**

- one-on-one
- audio-only
- no list of questions
- no notes, analysis
- record formal sessions

**pay rapt attention**  
**beginner's mindset**

**build trust & rapport:**

- support, non-judgment
- show you heard
- bring own personality

**help Speaker get to depth:**

- what went through your mind?

**depth:**

- inner thinking
- emotional reaction
- guiding principle

**surface:**

- explanation
- preference
- opinion
- statement of fact
- scene-setting
- generalization
- passive behavior

**listening deeply**

**person's purpose**

## Improve Your Listening Skills



### Eavesdropping

newsletter #16 | 20-Sep-2016



Indi Young

Aug 13, 2020 · 8 min read



### Tour Guide—an analogy for listening

Imagine you are in Beijing. You are visiting your grown daughter who moved there five months ago. In addition to seeing all the sights...



Indi Young

Jul 31, 2020 · 7 min read



### When you Listen, What Are You Thinking?

Notice your reactions. Clear your mind of questions. Follow with rapt attention.



Indi Young

Jul 15, 2019 · 3 min read



### Listening Deeply

You can't develop cognitive empathy by just looking—you have to go tug at the roots.



Indi Young

Jul 15, 2019 · 3 min read



### Hate Speech in Research

What do you do when you're conducting research and the participant speaks in a biased or dismissive manner?



Indi Young

Oct 17, 2018 · 8 min read

# participant sketches & nicknames



# participant sketch

**sketch:** to help you remember this individual, by providing a shorthand prompt for you to hold the strong guiding principles & inner thinking from the listening session in your mind during the thinking styles working session

**format:** the participant sketch can either be a paragraph or a set of lists

what key guiding principles am I focused on as I pursue this purpose at this time?

# participant sketch

**sequence:** write the sketch quickly in the 15–20 minutes right after your listening session

- if you go on to comb transcripts for concepts & write summaries, you will develop very rich **cognitive empathy** for this person
- keep it **focused on ~10 strongest** guiding principles & inner thinking, NOT all of them!
- you can cast some key concepts as emotional reactions
- write the sketch according to the **format** (next slide)

# typical problem space study timeline

frame study

recruiting

listening sessions

participant sketches

transcripts

concepts & summaries

cultivate patterns

thinking styles

layer MMD

align capab.

gap analysis

priorities strategy

job stories

purpose metrics



draft thinking styles  
(validated after 2<sup>nd</sup>  
and 3<sup>rd</sup> studies)

# participant sketch

**format:** the participant sketch can either be a **paragraph** or a **set of lists**

like an actor, **be this person as you write your own sketch**

- a. represent inner thinking, reactions, guiding principles
- b. use first person voice
- c. write in present tense
- d. capture their turns of phrase, significant names, words
- e. if writing a list, start each item with a verb

A	B	C	D	E
ID	Nickname - (Behavioral Aud Segment)	Inner Thinking	Emotional Reactions	Guiding Principles
101	Cornfield in the Middle of Nowhere	<ul style="list-style-type: none"> <li>- check to be sure the new app is storing as it is supposed to be</li> <li>- debate whether the convenience of others administrating is worth the cost</li> <li>- aim to be all ssd and cloud because of speed, no mechanical failures</li> <li>- try to figure out who to call after hours to help me debug the problem</li> <li>- notice there are a bunch of empty cages at the SAN and ask for lower prices</li> <li>- aim to set up storage software that will last, at least until the hardware reaches end of life</li> <li>- follow Jai's advice to involve the engineers with the tech support guys when the storage went offline</li> </ul>	<ul style="list-style-type: none"> <li>- feel upset microsoft didn't tell me about the firmware bug, to allow me to upgrade before our problem</li> <li>- feel resigned to giving up my plans for Saturday, working all night, and having 3am meetings to solve this bug and get the data back online</li> </ul>	<ul style="list-style-type: none"> <li>- try not to rely on one piece of hardware</li> <li>- make sure there are redundancies for storage and cooling, etc, not reliant on outside for energy, etc.</li> <li>- make sure I'm the one who responds when the CEO needs help with the laptop</li> </ul>
102	Well, Jeesh	<ul style="list-style-type: none"> <li>- decide to allocate based on rate of growth and storage overall; if 85% of an 800 Gig, then that is an emergency, but not 85% of a 80 terabyte disk</li> <li>- set up thresholds based on rate of growth to alert us</li> <li>- check why the threshold got hit and decide what to do based on that</li> <li>- look at the wall monitors whenever I walk into the room, and after lunch</li> <li>- write down what sales and biz folks are asking for so that the facts are there in writing and they can agree to me allocating more storage for that need</li> <li>- point to that document if the biz folks randomly look and wonder why it's been underutilized</li> <li>- design our own shelf, with a motherboard and drives, powered by DC, to be more efficient and cost-effective as a hosting provider</li> <li>- slowly get rid of older software because it is not as efficient</li> <li>- make sure I don't affect performance when I rebalance data between existing and new nodes I've added</li> </ul>	<ul style="list-style-type: none"> <li>- fell comfortable only when there is enough room for us to be able to take care of an outage efficiently</li> </ul>	<ul style="list-style-type: none"> <li>- try not to fail the customer because they judge you when anything goes wrong</li> <li>- as long as what you say is happening, I'm fine</li> <li>- Reliability is super important - always online, needs a reliable communication link back to office, data center</li> <li>- react as efficiently as possible</li> </ul>
103	The Fix-It Guy (process, procedure, documentation)	<ul style="list-style-type: none"> <li>- interview the groups using the servers to find out what they consider the most important</li> <li>- look at metrics to see what IOPs are average, to set into the evaluation contract</li> <li>- go in and look for the data dependencies one server at a time to</li> </ul>		<ul style="list-style-type: none"> <li>- find the root cause, which is often lack of process</li> <li>- always ask questions of the smart guys around me to learn</li> <li>- try to spread the knowledge that I learn so</li> </ul>

ID	Nickname	Sketch (paragraph format)
101	Three Basket System	I took over doing laundry when my wife was sick, and I've become pretty good at it--so good, in fact, that I have continued with that chore after she recovered. I am proud of how well I take care of things and how I am able to present myself on social occasions as neat and pressed. I worked out a system, you see. Rather than think of it as a chore to avoid, where it will build up and really become an effort on laundry day, I stay on top of it. I also have a three-basket hamper that helps me sort out the whites from the darks and the towels. I also try to dry the clothes on the line outside because my wife introduced me to that wonderful, energy-saving habit that makes the laundry smell so fresh. I even decided to go out and find a better ironing board, to make that task easier. Now I can iron like a pro. Just like before I was retired, when I owned a contracting company, there is the proper tool to use and the proper way to treat everything.
102	Small Space	I am a stay-at-home dad and I often handle my family's laundry. When I'm preparing to do the laundry, I usually read the labels to know how to handle it. Sometimes I can just remember how I washed something last time, except for my wife's clothes—I always read the labels on those so I don't accidentally ruin something of hers. Also, I wash everything using the same "free and clear" detergent because it's the most economical and doesn't irritate the baby's skin. We live in a small space and so I try to take care of laundry right away to make sure the space doesn't get too cluttered with clean laundry that needs to be sorted and put away. Usually, I just do that in the bedroom because it's the place where we store most of the clothes and towels, and everything is in one place. We stack our clothes in vertical containers in the closet and under the bed to make the most of our space.
103	Geometric Explosion	I wish laundry was less complex. When I look at the washing machine I feel daunted by all the different possible combinations of options to launder clothes. I don't know which combinations are the best to choose, despite the fact that I have been doing laundry my entire life. We have our own washing machine so I can take my time to do laundry over several days. I spend time separating towels from darks and lights on the floor. My goal is to make those 'nicer' hard to re-buy items last forever, so I follow the care instructions on the label. When I ruin clothing in the laundry, no matter how expensive, I always feel I've screwed-up. It's a relief when laundry accidents turn out well or can be fixed, because I think ruining clothing is wasteful. I find it difficult to throw clothes away, whether they are ruined, too small, or out of fashion because I might wear them again one day.
104	Feel Pretty	I am a model, and in this profession I must always look my best. I'm also 6' tall, which means to look my best, I need to bring my own clothes that fit me and flatter me to a shoot. The clothes that the stylist brings don't always fit me well. So, to be prepared, I do have a large collection of clothes--so large that I've had to buy a few storage cabinets to contain everything. I like things organized--mostly so I can find the items I'm thinking will be perfect for a certain shoot, but also because I like my place to look calm, not chaotic. It cheers me to see all my necklaces hung in order of color and metal, inspiring me to choose an outfit. I feel pretty when I wear the outfits I pull together. Of course, I do all my own laundry (except for the things like blazers, that are hard to iron), so when I buy clothes I make sure the fabric won't wrinkle and will be easy to take care of. And when I bring something home, I have a rule that something has to go, to make room. I take bags of clothes to the Goodwill every month.
105	The Preservationist	I love great design, and I choose everything around me with a great deal of consideration. That's true of just about everything but it's especially true of my clothes. I appreciate how those little details can make me look put together and sharp. It's like there's an added layer of specialness to what I'm wearing; I know that other people notice it too. That consideration extends to how I take care of them. My mom and grand-mother were both knowledgeable about clothing, and even though I don't have the same skill or knowledge of fibre, I really value what I learned, especially from my mom – she has so much expertise and knows how to care for any kind of clothing. I rely on that now as I spend a lot of effort to keep my clothes looking sharp and me looking well turned out. When the clothes I love start to degrade, either through wear, but especially through lack of care, I feel really sad. It's important to try to keep the sparkle of the design intact – that's what I paid for, and what I enjoy about having these special things.
106	Shuffling Festival Socks	My approach to doing laundry is based directly on the intensity and type of workout I am doing. For certain exercises the bar is resting on my chest or back and leaves a mark. I've changed the material and type of shirt I wear on those days to protect my skin. I'm also concerned with how those marks look to other people at the gym. Shirts that get marked up from doing that exercise I only wear for late night workouts. Brown stains that people can see. I also

## Geometric Explosion

I wish laundry was less complex. When I look at the washing machine I feel daunted by all the different possible combinations of options to launder clothes. I don't know which combinations are the best to choose, despite the fact that I have been doing laundry my entire life. We have our own washing machine so I can take my time to do laundry over several days. I spend time separating towels from darks and lights on the floor. My goal is to make those 'nicer' hard to re-buy items last forever, so I follow the care instructions on the label. When I ruin clothing in the laundry, no matter how expensive, I always feel I've screwed-up. It's a relief when laundry accidents turn out well or can be fixed, because I think ruining clothing is wasteful. I find it difficult to throw clothes away, whether they are ruined, too small, or out of fashion because I might wear them again one day.



first formula is for inner thinking and  
guiding principles:

**verb** + **key point** + **supporting detail(s)**

second formula is for emotional reactions:

**feel** emotion + **key point** + **supporting detail(s)**

ID Nickname	Inner Thinking	Emotional Reactions	Guiding Principles
<p>101 Single Mom with Toddler Wiping Fingers</p>	<ul style="list-style-type: none"> <li>- Avoid being my mom again, in 20 years, living with my grandparents</li> <li>- Wish there was a guarantee that a degree I earned would result in a full time job</li>   <li>- Decide not to pursue the Sullivan accounting degree because they told me I can't change majors because I failed the accounting class twice</li> <li>- Seek a degree where there are lots of job opportunities and I will get hired as a woman</li> </ul>	<ul style="list-style-type: none"> <li>- Feel frustrated that I have debt but no degree yet</li> <li>- Feel afraid of taking classes that will add up to half of about six different degrees</li>   <li>- Fear that I will get a degree, like my mom or my friend, and there will be no jobs</li> <li>- Feel fine being a gas station attendant full-time when I was single, but not now that I'm a mom</li> </ul>	<ul style="list-style-type: none"> <li>- Give undivided attention to my son so that he can learn and grow quickly</li> <li>- Believe, because everyone said it, that I have to get a degree to make a living</li> </ul>
<p>102 Yes Ma'am</p>	<ul style="list-style-type: none"> <li>- Aim for an firm ACT score that is right at the average for all students at UofL</li> <li>- Push out of my bubble to meet new people</li> <li>- Stay close to home so I can touch base with my family twice a week to keep up</li>   <li>- Make an effort to be eligbile for scholarships</li> <li>- Realize I need to manage my time better</li> </ul>	<ul style="list-style-type: none"> <li>- Feel interested in protecting my community</li> <li>- Feel close to my family</li> <li>- Feel afraid I'll miss something with my family if I am away for too long</li>   <li>- Feel inspired by the student who was from a strict religion, and how he didn't let go of his religion but adapted to open up to the rest of the world</li> </ul>	<ul style="list-style-type: none"> <li>- Respect the authorities around me</li> <li>- Do the best that I can</li> <li>- Go for the program/scholarship because there is always a chance it will work out for me</li> </ul>

# participant nickname

**purpose:** to help you remember this individual

**format:** 1–2 words, represent the context of the individual, not their thinking style, so you can tell them apart from other participants

NOT a thinking style label, which is a group name distilled from a set of individuals

nickname is a unique memorable context

# nickname is a unique memorable context

example nicknames not unique to this individual

- confident & mindful
- scientist at heart
- things happen for a reason
- the secret
- connect the dots
- clean answers

example nicknames with unique memorable context

- hootenanny pit
- rather be outside
- physicality of dance
- black octopus
- I wanna fight
- stronger, tougher, kinder
- I'm a tinkerer
- share my costs
- desire the bling

in this class,  
we skip the nickname

nickname was already created

# validity of data

from memory?! how do we know that we're not being biased?

in the end, we focus on only 2–4 strong guiding principles that a group has in common

- at that level we are certain that the participant strongly carries these 2–4 guiding principles
- the participant may also follow additional guiding principles that are different from others in this group
- if we don't know for sure the participant carries the guiding principles strongly, we drop them from group

# typical problem space study timeline

frame study

recruiting

listening sessions

participant sketches

transcripts

concepts & summaries

cultivate patterns

thinking styles

layer MMD

align capab.

gap analysis

priorities strategy

job stories

purpose metrics

this is just a reminder of each person

here is where you forge the deep understanding—cognitive empathy



draft thinking styles (validated after 2<sup>nd</sup> and 3<sup>rd</sup> studies)



a peek at one of the airline studies:  
a transcript & a combed sheet

(see how deep we usually go)

# homework

# typical problem space study timeline

frame study

recruiting

listening sessions

participant sketches

transcripts

concepts & summaries

cultivate patterns

thinking styles

layer MMD

align capab.

gap analysis

priorities strategy

job stories

purpose metrics



draft thinking styles  
(validated after 2<sup>nd</sup>  
and 3<sup>rd</sup> studies)

# homework logistics – Live class participants

**Live:** We will share a Google sheet with you, either **Group A** or **Group B**. (Links are on the Class page on [indiyoun.com](http://indiyoun.com))

- Create a tab in that sheet.
- Put your name on the tab plus one of the following indicators:
  - “wip Pat” if you are not finished yet (Work in Progress)
  - “r Pat” if you are ready for review
  - “\* Pat” appears when the reviewer has commented on it
  - “? Pat” if you have questions about the reviewer comments

		row 17, so I was happy to get us closer to the front of the plane. I was thinking we'll get off the plane sooner.				
6	808	I was able to pay for my luggage right on the computer, so I wouldn't have to worry about that. It was one less thing I had to do at the airport.	Emotional reaction	Feel relief, feel relaxation		
	808	it was a self-check-in kiosk it was called, so I've never used that before, so I was getting	Emotional reaction	Feel frustration, feel confusion		

+ ☰ \* Diana ▾ \* Sridhar ▾ R Greg H ▾ **WIP Claire S ▾** \* Cheri LZ ▾ 3 \* Pavel B ▾ \* Taher ▾ < > Explore <

# homework logistics – Live class participants

Group A homework due (for review) 16–May pm

Group B homework due (for review) 20–May noon

or earlier (yes!)

if you don't finish the homework by the next class,  
Indi will not review it (if you are aiming for the  
six–course certification, homework is required)

(it's too difficult to review homework retroactively)

# homework logistics – Live class participants

**On the platform:** Please find links to the homework materials, marked with HW. You can also download the answer sheet for self-review.

You are also welcome to look at other people's tabs.

If you want, you can partner for the homework. Solicit partners on Slack in the #4-thinking-styles channel.

\* means you have Reviewer Comments on your homework. You can check Reviewer Comments on other people's tabs, too.

# homework logistics – Follow–along participants

**Follow–along:** You will do your homework using the Excel spreadsheet on the platform (assuming you can open it). There will be no homework review by Indi, but there is an answer sheet you can use to check your work. There are also lots of other helpful materials up there, if you have extra time to build your skills.

## participant sketch

you write the sketch from memory

in our homework, you have transcripts instead of actually doing the listening sessions and concepts & summaries



(I didn't want to assign 8 hours of homework!)

from memory, not concepts & summaries with quotes



# homework background



An airline (real client study):

- What are we missing in terms of perspectives from frequent travelers?
- Can we validate the thinking styles?

**Purpose:** “what went through your mind during your recent day of air travel?”

There were 100 participants, of which these are close to the final set of 20.

The study had the recruiting attribute of some people with elite services, some people with fear of travel, people traveling in upper class, frequent travel; half travel w/kids or groups and half solo/couple.



I25 fx

	A	B	C	D	E	F
1	<b>ID</b>	<b>Transcript Name</b>	<b>Group A Reviewer</b>	<b>Group B Reviewer</b>	<b>Extra Reviewer</b>	<b>Extra Reviewer</b>
2	701	Give My Family the Good Seats	<your name here?>	<your name here?>	<your name here?>	<your name here?>
3	702	Make It Stress Free				
4	703	Independence as a Flyer				
5	704	Nirvana Metal Cocoon				
6	705	Watching Everything Get Smaller				
7	706	Everything Is a Potential Adventure				
8	707	Scared of Flying But Love to Travel				
9	708	Reader of Books and Magazines				
10	709	Flying Was Less Stressful in the 80's				
11	710	<missing>				
12	711	Pre-Check Loose-Group Organizer				
13	712	Youth Group Wrangler				
14	713	Bring The Whole Gang Along				
15	714	Don't Bring Drama Into It				
16	715	Nervous Flyer Trying to Cope				
17	716	Always Running Late to the Airport				
18	717	I'm With The Band				
19	718	<missing>				
20	719	Get Home Quickly Using My Status				
21	720	I'll Tell You When Something Is Wrong				
22	721	My Daughter Is a 6-Yr-Old Silver Elite				
23	722	Indi Goes to Beijing				

for live course participants

where is my focus of attention as I  
put myself out there in the airport  
and on the plane on the day of travel?

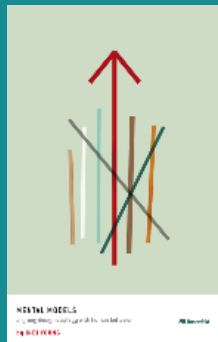
# homework write the participant sketch



1. There is a folder of transcripts shared on Google drive.
2. On the Sign-Up Sheet, put your name next one or two transcripts. (Let's try to cover all the transcripts between us.)
3. Read a transcript, which will take around 30 minutes.
4. On the 202105 Homework 1 Sheet, scribble down only ~10 strongest guiding principles & inner thinking for this person. You can recast as emotional reaction if helpful. Spend 15–20 minutes writing these concepts. (during or after reading)
5. (Write the concepts as **either** lists or paragraphs. **You do not need to do both**. You can play with the two formats to see what's comfortable.)
6. The idea is to represent the whole of this person with regard to the purpose of “day of air travel,” with special focus on which concepts represent them strongly.

# stay connected ... over the years

## ROSENFELD MEDIA ALL-BOOKS DISCOUNT:



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version

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- workshops for your team
- recorded talks
- diagrams, examples, books
- consulting
- research studies
- app: diagram-generator

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indiyoung



indiyoung



inclusive-software