THINKING STYLES

Advanced Training Course
Class #4
@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

homework review

homework describing & naming the thinking styles

Either together as a team working session, or asynchronously as paragraphs, edits, and comments:

1. First, describe each thinking style group we found in our working session today. Use first person, present tense. Put yourself in their mind on that day of travel, on that date, in that airport and airplane. Only write a few sentences. The description contains inner thinking and guiding principles. (Avoid any description of concepts that we set as "off–limits.")

2. Second, come up with a few suggestions for a label for this group. Make sure it's a label people would be happy to use to describe themselves.

3. Vote on a final label. (optional) Try these labels & descriptions out on people who fly, to see if your wording is reasonable, or if the groups themselves are off.

4. (optional) Pick a demographic you've heard inner thinking about and try forming a demographic lens.

our review will be:

- to converge the two sets of descriptions in the two team frames

- see how Group A and Group B compare

- to see how these thinking styles compare to the set I made from all 8 studies back in 2013 (later in this deck)

making thinking styles (the last bit)

check your work

steps for creating thinking styles

1. remember each person

review participant sketches

each team member represents a number of sketches

2. establish the focus

list what is "in" or "off-limits" based on your org's focus or priority (... or not!)

pare back sketches to what is pertinent for each person

separate out distinct contexts (if needed)

3. the TS working session

as a team, between 4–10 hours

move participants with guiding principles in common into groups

annotate each group by listing ~2–4 common guiding principles

highlight people by strength of match to the annotation

clear your mind

iterate to see if you can make each participant belong to a unique group

4. describe & label each group

briefly describe each group in first person, using inner thinking & guiding principles

then label the group with an adjective or noun phrase
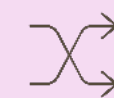
5. consider demographics

does discrimination, physiology, culture, or environment affect thinking?

6. check your work

check your descriptions with real people; maybe start over

compare to past segmentation work

shop your thinking-styles around

find new people who have actually done this purpose

(usually avoid participants because they are likely to pick at a group description until it only represents what they told you themselves)

potential bias in picking new people to ask:

… you can make this informal or you can formally recruit using your initial screener

… or you can do another study to corroborate (see later slide)

describe the thinking-styles, and see what their reaction is (stay away from the "off-limits" you specified in step 2)

"I've done some research about _____. Have you done this recently or a lot?"

if yes:

"I've come up with some persona groups, and I want to see if they make sense. Can I ask you if you belong to one? It will only take a minute."

if a person says they belong to multiple thinking-styles, find out if these are context-dependent (if so, that's okay)

example: airline, purpose of getting to the gate on time + taking the flight

context while on a business trip
context while bringing someone rambunctious, clumsy, or unaware of air travel "rules"
context while bringing someone who can't move around well

make needed edits to names & descriptions

or shift the way you grouped participants

Careful Planner – 104, 105, 106

Something I saw inspired me to cook a particular dish. I want it to turn out just like I imagine (or just like the photo). So, I like to have a simplified process, because there's always this climax in the kitchen when things need to be done and it can get stressful. To make sure I have everything I need and don't mess up any steps, I might get everything out on the counter or maybe write some notes. I refer to a recipe as I go to make sure I have the right cooking temperature and times. If things don't turn out the way I want, it can be disappointing.

Note: Some of the people that I validated this description with, outside of the study, mentioned that they aren't as disappointed as our participants were. Also, there are all levels of experience in this segment, from beginner to expert. The key is the concept of pursuing the thrill of new and unique dishes to cook. Some of our participants pursued this thrill more regularly than others. Our participant 104 had dietary limitations that kept him from exploring much these past couple of years.

do another study to refine & validate

first study, if well-framed:

- 10–20 participants: this is a first draft of thinking styles
- 20+ participants: this is a solid draft of thinking styles

then do another study with 10 participants (every year or so):

- choose the same purpose
- choose a new purpose
- choose a new neighborhood from the first study results
- choose a different lens (e.g. focus on physical disabilities, focus on low income, focus on high-transaction-buyers)

build a set of thinking-styles over time

corroborate, edit, or add to the thinking-styles with
every iteration, in each following study

you might find a couple new thinking styles after a few
more studies (cast of characters is slowly revealed)

compare before & after

steps for creating thinking styles

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each team member represents a number of sketches

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does discrimination, physiology, culture, or environment affect thinking?

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check your descriptions with real people; maybe start over

compare to past segmentation work

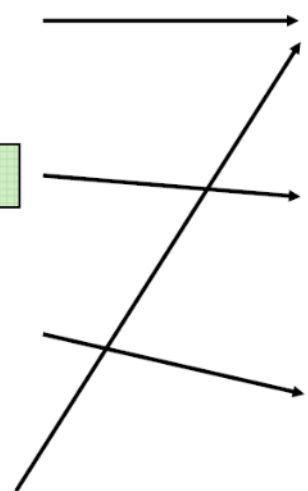# purpose: finding a person to date seriously

Original Hypothesis - Sep 2014

Adopter of Best Practices

I'm afraid of being stuck with something that won't work for me. I don't have time to waste messing around with stuff or setting things up. I know what I need to get done. If I'm not just getting a new version of what I've already had, I trust the store person, or my friend/family member, to tell me what will be the best choice for me.

Savvy with the Answers/Access

I have a reputation of being the person who can help or who can find the right person with the answer. I am the person people rely on to get things done. I'm also the first to verify/validate any statement that someone else makes. I'll find the full range of possible answers and usually recommend one that I think is the best. I love to have tools that can help me get these answers and make it look effortless.

Ahead of the Curve

When leaks of about new products start coming out, I try to read all about them because I can't wait to to own it. I never get caught with an old model or wearing last Fall's clothes. I'm a trendsetter, and I want to make sure those around me know it, and I'm always the first to try out a new restaurant and become a regular before it gets popular. By being first, people know that I think it's important to invest the time in discovering the latest things. (Since I change my phone so often, I never bother with the contracts.)

Initial Round (10 Participants) - Dec 2014

Express Myself

I'm a fashion-forward person who sees my purchases as an opportunity for self-expression and fashion accessorizing. My phone/watch are an important part of my overall look and I am captivated by aesthetically pleasing things. My shopping approach is intuitive and focused on envisioning how my phone will fit into my life. Having an abundance of connectivity to stay in touch with family and friends all the time is very important to me.

104, 108, 102

Rely on the Phone / Desperation / Get the Right One

I need to use the phone for extended periods of time, and I use work applications out in the field on my phone. Since a phone is one of my most important purchases, I don't rush into making a decision and avoid compromising what I need from a phone. I also seek out ways to save money on my contract, like calculating the cost of owning my phone instead of renewing my contract. It's important for me to have a reliable way to stay in touch personally and professionally, because I'm not a flaky person. I feel lost without my phone, so I troubleshoot problems that come up with it.

101, 105, 107, 110

Learn From Other People's Experiences / Distrust

I seek out unbiased reviews, so I get an honest picture of how my devices work and how people are receiving them before committing to purchasing. I don't know all of the technical terms, but I know what I need for my usage and will evaluate phones based on that. I worry that information from the manufacturer won't give me a realistic view of the device, especially the battery life. I like to use my phone for entertainment, so having enough memory for photos and videos is essential.

103, 106, 109

purpose: decide what to eat for lunch

hypothesis (personas)

based on data

My Fridge Is Unplugged (Joe)

Cost Matters Most (Amanda)

Have It My Way (Jeanne)

Watch What I Eat (Chris)

Don't Think Too Hard (Going by Rote)

Shake It Up

It's the Place that Counts

Food Is My Demon/Obstacle

our new sets are similar …

we've gotten more nuanced in making thinking styles since 2013

Engaged

I'm already planning my next trip.

I love travel. I'm entranced by places to go and people I might meet. I am intrigued by the plane and how pilots and crew pull everything together. I add a side trip to my business travel to check out a new place. A long layover means time to explore the airport. I get to chat with the employees. Travel helps me break out of the routine.

Unfazed

I'm prepared for anything to happen.

I want my travel to be stress free and drama free. I've arranged contingencies for all the scenarios I can imagine. Long security line? I show up an extra hour early. Flight delays? I brought stuff to do. Food? I bring something on board. You can throw anything at me. I will even extend my zen state of mind to others, helping them deal with any drama.

Frustrated

Travel isn't going as I had planned.

Everything that can go wrong will go wrong. There's always something: I get singled out in security or the flight is delayed or my luggage flies to a different destination than me. The airline drops the ball and I'm forced to remedy the situation. It takes hours that I'd rather spend doing what I had intended.

Get It Over With

I'm trying to minimize my travel time.

I want to accomplish everything, so I set up a tight schedule on my travel day. I have appointments or events I want to hit before and/or after the flight. Or maybe I'm uncomfortable on planes. Or I don't want to spend too much time away from my home and family. I'm prepared to bury myself in my work or another distraction while on board.

thinking styles from 2013

Engaged

Unfazed

Frustrated

Get It Over With

thinking styles from Group A 2021

Let's Do It Correctly

Keep Myself Moving (& Working)

Positive Experience for Everyone

Relaxed, Not Stressed

using thinking styles

stakeholders

get out of my sandbox!

when existing work makes stakeholders think, "conflict!"

1. market segments: market segments can be used in matrix with thinking styles to pinpoint important combinations

2. personas: on your own, test their personas so you can categorize what errors were made, if any

3. relationships: take time to build trust with your stakeholders & peers via listening sessions

when existing work makes stakeholders think, "conflict!"

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insurance market segments

Good Record Discount Seeker: Nora

I have had insurance with this company for 10 years, and I've been driving for over 20 years. I've only had one auto claim, where the fault was clearly not mine. My home is also insured with the same company, and likewise, I've filed no claims. I ought to be one of the people the company thinks is a "good bet." As such, I want to pay less in premiums than other customers who don't have such good records as mine.

New Record, Poor Record: Victor

I've moved to this country for a three-year period at my company's offices here. I have a driving record from my home country, but it does not transfer. Here I must start anew, so I am looking to establish auto insurance without proof that I am a careful driver. Of all the things involved with moving to a different country, this little detail feels unwelcome and distrustful.

Elevated Risk Circumstances: Anja

I am on the road constantly as a part of my job. Since the company I work for prefers that I drive my own car, they subsidize my costs-including insurance. The company allows me to add high-mileage coverage to my policy, and pays the difference. Since I found out about additional coverage, I want to look into getting better coverage for my house, since it is located in a hazardous zone.

Extra Protection Seeker: Azat

I drive a good car and want to have everything taken care of, no arguing, if something happens to it. I also drive in other countries, when I travel for business. I want my insurance company to cover me in these places as well, since I am familiar with them and with the process of filing a claim. They can deal with the international paperwork. At home, I have a small art collection which I would like to be covered, as well.

near-miss accident thinking styles

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 repairs, but also in terms of future insurance rates. I want to defend myself so that I am absolved of blame. I don't want people to think of me as guilty, nor high-risk in terms of insurance, because it wasn't my fault. I will work at proving myself right until the people at the insurance company trust me.

Downplay It

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 want the claim process to be quick. If the company asks for more and more documentation, pictures, and statements, then the process has gotten far too involved. I don't want to argue about who is to blame. 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.

matrix them together

highlight areas of priority to the org

focus on these areas for strategy work, scenarios, etc.

Behavioral Segments
(File a Claim: Auto or Home Insurance)

This matrix shows that the following combinations of segments are important to this insurance business:

Good Record Discount Seeker + Let This Be a Lesson; New Record, Poor Record + Troubled About It; New Record, Poor Record + Downplay It; Elevated Risk Circumstances + Troubled About It; and Extra Protection Seeker + Downplay It.

purpose: decide on a major for college

	Passionate About the Topic	Look Forward to the College Experience	Means to an End	Exploring Paths
low GPA		★	★	★
high GPA	★	★	★	★
older than 25	★		★	★
financial assistance needed				

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

when existing work makes stakeholders think, "conflict!"

1. market segments: market segments can be used in matrix with thinking styles to pinpoint important combinations

2. personas: on your own, test all existing personas so you can categorize what errors were made, if any

3. relationships: take time to build trust with your stakeholders & peers via listening sessions

tests of personas
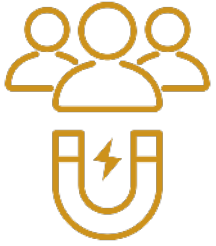
marketing-only test
do the personas only address the lead-up to the purchase/use?

lack of data test
does the data that was used to create the personas exist? can you access it?

quality of data test
does the data used to create the personas contain only surface concepts, without depth?

same persona test
are key guiding principles and inner thinking the same, and the demo-graphics different?

fortune cookie test
read the same fortune from the point of view of each persona; does each persona react similarly?

horoscope test
do the details of the personas extend beyond the purpose? into the off-limits?

reverse-engineered test
do the personas map directly to features of the solution without referencing people's larger purposes?

role-based test
do the personas map to roles? is it assumed that everyone in that role thinks the same?

when existing work makes stakeholders think, "conflict!"

1. market segments: market segments can be used in matrix with thinking styles to pinpoint important combinations

2. personas: on your own, test all existing personas so you can categorize what errors were made, if any

3. relationships: take time to build trust with your stakeholders & peers via listening sessions

it may appear that stakeholders intend to
undermine your research

this is rarely their actual purpose
(it is your perspective)

spend time, repeatedly, with each stakeholder

listen, listen, listen

understand their thinking style: their guiding principles, inner reasoning, and reactions

your own view of the research will change & your communication will be so much richer

… when a stakeholder passionately dismisses:

- building a relationship with you
- any perspective but their own (narcissism)

… that's when you have a problem

using thinking styles & measuring value

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

but first, you must …

layer thinking styles on the upper half of your opportunity map (the mental model diagram half)

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.
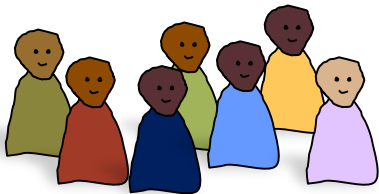
many answers & perspectives

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."
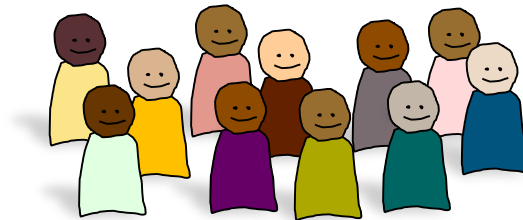
respected expert

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.

Feel Intrigued Exploring a Topic

Submit Response If I'm Intrigued by Conversation

Believe You Can't Help Learn Stuff Answering Qs

Start Convo on QQ for Topics That Interest Me
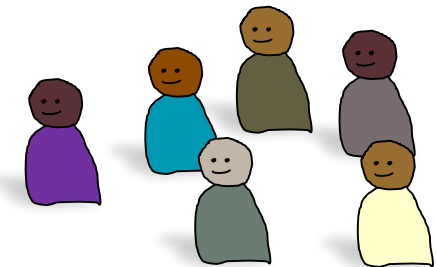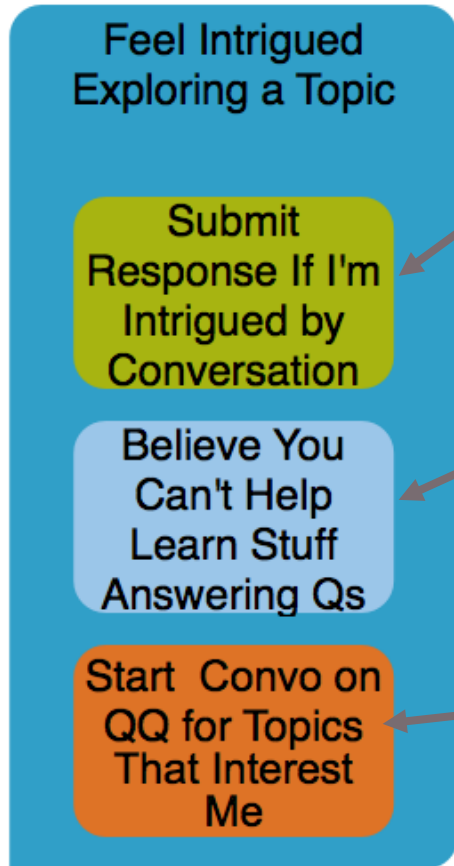
doing it the right way
I'll give what I know if it helps me somehow.

many answers & perspectives
Happy for the added benefit I get helping others

respected expert
I'll start the conversation and see where it goes

Legend:
- Doing It My Way
- Respected Expert
- Team & Crowd Player
- Blend
- Main Scope of Project
- Not in Project Scope

Ask Others for Input on Problem

Ask Colleague For Help Solving Something
- Worry I'll Not Think of All Scenarios Working Alone
- Reach Out to People in Other Company Locations
- Avoid Getting Up From Seat to Find Info If I Can
- Work Out Solution Sitting with Colleague
- Fear Being Perceived As Dumb by Colleagues

- Contact Expert I Don't Know Directly With Questions
- Look for People Who Are Talking About My Problem
- Contact Forum Posters Directly With Questions
- Feel Frustrated I Can't Chat w/ Developer at Vendor

- Ask Discussion Group at My Company for Help
- Believe Getting Solutions from Inside Company Safer
- Avoid Newsgroups bc Our Work Too Specialized
- Go Outside the Company If No Response

Ask Outside Group For Help
- Search for Users Group
- Join Groups After Running Into Problems
- Ask Question in Forum bc Help Not in My Language
- Post Question on Discussion Group
- Ask Vendor Users Group to Help Solve Problem
- Believe Community Triples My Knowledge
- Believe Partic in My Posting Solicits More Solutions

- Pick Forums w/ Lots of People for Better Response
- Visit Forum When I Can't Find Other Solutions
- Avoid Posting bc Can't Wait for Forum Response

- Raise My Issue at a Conference
- Raise My Issue at a Conference

Feel Surprised / Excited by Responses
- Rate The Answers by User's Level Of Expertise
- Respond to Offer to Share Code About Problem
- Feel Happy to Receive Fast Response from Forum Post
- Feel Happy to Get A Multitude Of Responses From My Post

Feel Let Down by Discussion Group
- Wait a Long Time for Response from Forum
- Feel Frustrated Links in Answer Blocked by My Company
- Feel Frustrated by Newbie Questions After a While
- Feel Waste of Time Reading If No Resolution
- Feel Irritated Forum Answerers Don't Get Q
- Feel Insulted If Answerer Says "Not That Way"
- Feel Frustrated Bc Problem Not Discussed In Spanish

- Avoid Discussion Groups With Poor "Housekeeping"
- Believe Moderated Forums Have Better Focus
- Ignore People In Groups Chitchatting
- Feel Sick of Anonymous Posts
- Feel Annoyed That People Post Diatribe / Rude Answer

Give Back to Community Who Helped Me

Feel Good Helping Others
- Feel Good by Helping People
- Feel Happy Making Someone Happy
- Try to Be Good Citizens in Dev Community
- Believe Comm Can't Survive If People Don't Give Back
- Enjoy Camaraderie Of Posting Q&A
- Believe If You Share Info It Comes Back To You
- Feel Proud My Expertise Is Recognized

Troll for Questions I Can Answer
- Open QQ To See If Anyone Is Talking
- Monitor Internal Group to See What Has Been Posted
- Check Groups Every Day to See What Comes Up
- Scan for Unanswered Posts
- Feel Frustrated I Don't Know if Answer is Complete
- Feel Frustrated I Can't Flag Flames
- Volunteer to Answer Posts, Calls

- Avoid Taking Too Much Work Time Answering Qs
- Hide My Presence on Group When I Am Busy

Decide Which Posts to Respond To
- Answer Posts Not Getting Attention
- Respond to Postings Without Good Faces
- Answer Questions in QQ If I Am Asked
- Respond If I Already Know the Answer
- Respond If I Just Solved the Same Problem
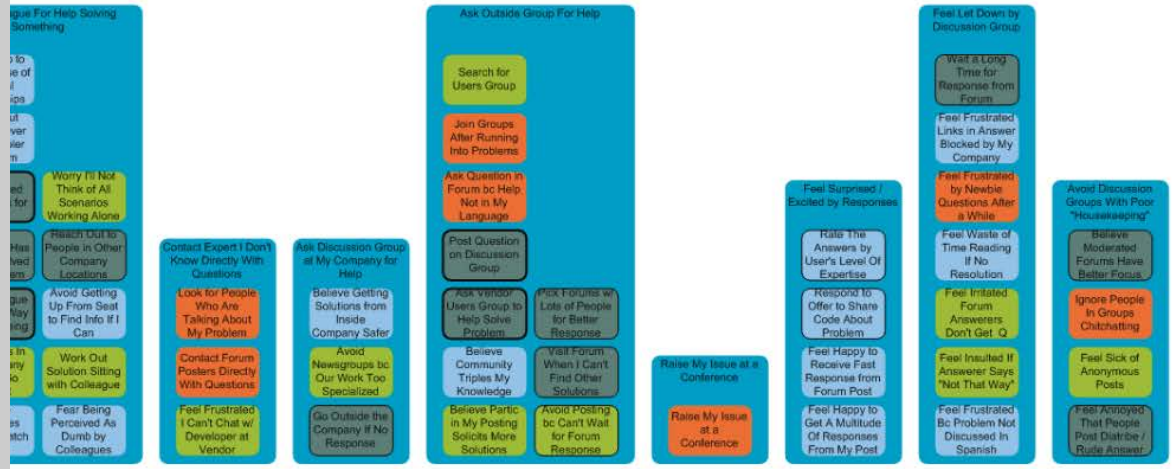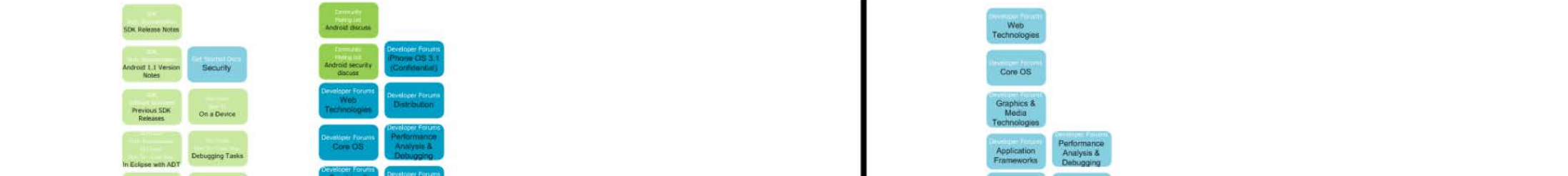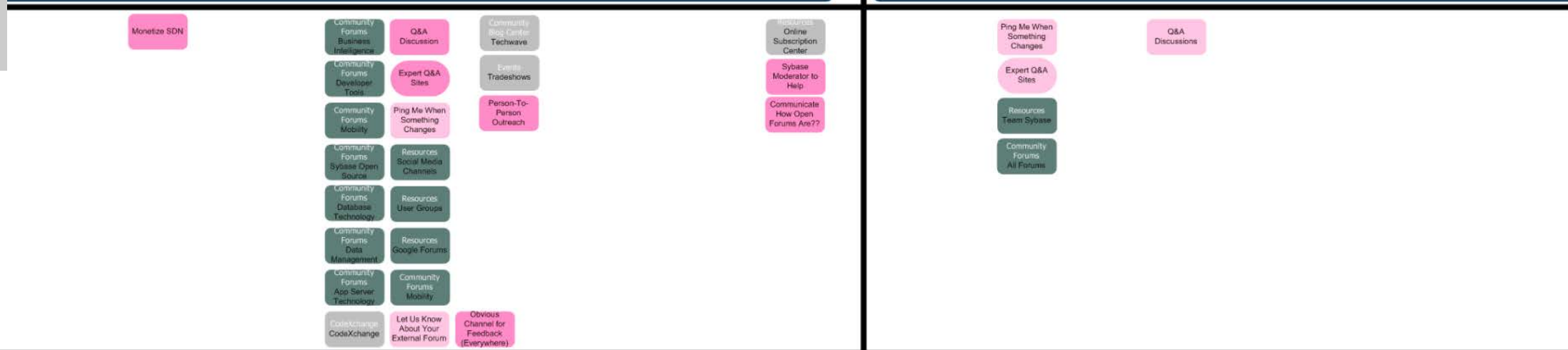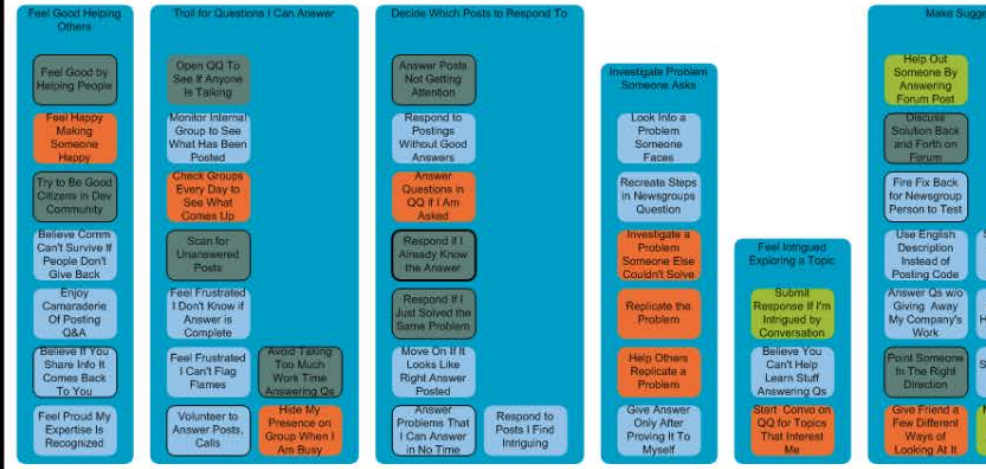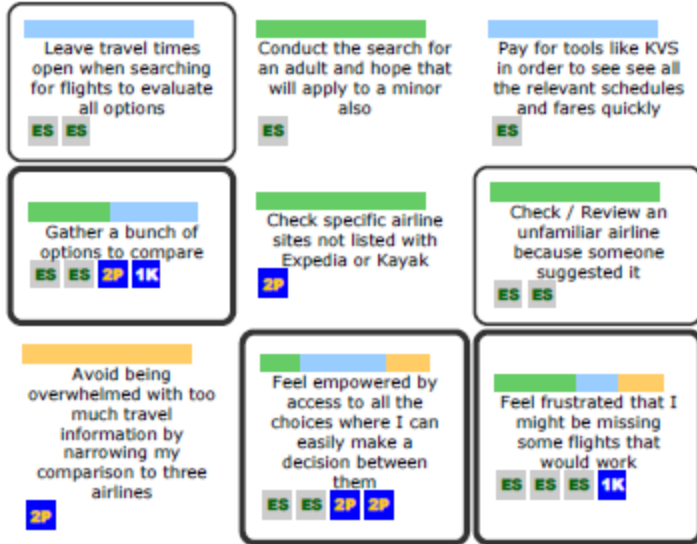- Move On If It Looks Like Right Answer Posted
- Answer Problems That I Can Answer in No Time
- Respond to Posts I Find Intriguing

Investigate Problem Someone Asks
- Look Into a Problem Someone Faces
- Recreate Steps in Newsgroups Question
- Investigate a Problem Someone Else Couldn't Solve
- Replicate the Problem
- Help Others Replicate a Problem
- Give Answer Only After Proving It To Myself

- Feel Intrigued Exploring a Topic
- Believe You Can't Help Learn Stuff Answering Qs
- Start Convo on QQ for Topics That Interest Me

Make Suggestions
- Help Out Someone By Answering Forum Post
- Discuss Solution Back and Forth on Forum
- Fire Fix Back for Newsgroup Person to Test
- Use English Description Instead of Posting Code
- Answer Qs w/o Giving Away My Company's Work
- Believe You Can't Help a Few Different Ways of Looking At It
- Point Someone In The Right Direction

Not in Project Scope (cards)

- Monetize SDN

- Community Forums Business Intelligence
- Community Forums Developer Tools
- Community Forums Mobility
- Community Forums Sybase Open Source
- Community Forums Database Technology
- Community Forums Data Management
- Community Forums App Server Technology
- CodeXchange CodeXchange

- Q&A Discussion
- Expert Q&A Sites
- Ping Me When Something Changes
- Resources Social Media Channels
- Resources User Groups
- Resources Google Forums
- Community Forums Mobility
- Let Us Know About Your External Forum

- Community Blog Center Techwave
- Events Tradeshows
- Person-To-Person Outreach

- Obvious Channel for Feedback (Everywhere)

- Resources Online Subscription Center
- Sybase Moderator to Help
- Communicate How Open Forums Are??

- Ping Me When Something Changes
- Expert Q&A Sites
- Resources Team Sybase
- Community Forums All Forums

- Q&A Discussions

- SDK Release Notes
- Android 1.1 Version Notes
- Previous SDK Releases
- In Eclipse with ADT
- Get Started Docs Security
- On a Device
- Debugging Tasks

- Community Meetup Android discuss
- Community Meetup Android security discuss
- Developer Forums Web Technologies
- Developer Forums Core OS
- Developer Forums iPhone OS 3.1 (Confidential)
- Developer Forums Distribution
- Developer Forums Performance Analysis & Debugging

- Developer Forums Web Technologies
- Developer Forums Core OS
- Graphics & Media Technologies
- Developer Forums Application Frameworks
- Performance Analysis & Debugging

airline mental model diagram with thinking styles + marketing segments

Compare Flight Options

Compare departure times, schedules across different carriers
ES ES 2P

Try to see schedules and prices for travel dates all at once
2P 1K 2P

Look at www.flightstats.com to find on-time performance for each flight I am considering
ES

Shop around to compare prices
ES 1K

Check for deals, prices on Kayak, Expedia, Priceline, etc.
ES 2P 3P ES 2P 1K

Check airline sites for better prices
1P 1K

Compare price when I have found several flights that meet my schedule needs
2P

Put agent on hold to check another airline's website for better price
ES

Double check other airline prices or schedules just in case before booking on my preferred airline
2P 1P 2P

Try to include checked bag fees in my comparisons, but sometimes forget
2P ES

Feel happy to discover a better fare
ES ES 1P

Feel pleased to find a really good price
3P ES

Feel upset by high prices
ES 3P 1P

Eliminate flights that are too expensive
ES ES

Write down / paste to text file flight information so I remember it
ES

Minimize the Travel Time

Select flights that represent the least travel time
ES ES 2P 2P 1K 1P

Pick shorter duration flights when prices are close
1K

Lo to

Pick direct flights regardless of price
ES

Trade off sleeping in New Year's morning for a non-stop
ES

Av an sh
2P

Eliminate a leg of the trip to avoid flying extra time
ES ES

Eliminate a short visit home because it means extra legs of travel
ES 1K

Fi dri o

Look forward to only one brief flight, then a car trip because I am sick of flying
ES

Feel relieved about taking direct flight
ES

F Sa n
1K

Gather a Bunch of Flight Options

Leave travel times open when searching for flights to evaluate all options
ES ES

Conduct the search for an adult and hope that will apply to a minor also
ES

Pay for tools like KVS in order to see see all the relevant schedules and fares quickly
ES

Gather a bunch of options to compare
ES ES 2P 1K

Check specific airline sites not listed with Expedia or Kayak
2P

Check / Review an unfamiliar airline because someone suggested it
ES ES

Avoid being overwhelmed with too much travel information by narrowing my comparison to three airlines
2P

Feel empowered by access to all the choices where I can easily make a decision between them
ES ES 2P 2P

Feel frustrated that I might be missing some flights that would work
ES ES ES 1K

Feel frustrated comparing over the phone because I can't see the flight information with my own eyes
2P

Feel confused by different flight costs for same destination, non-stop or with stops, for different days
ES

Worry the format of the tool hides things from me
ES 2P

Feel rueful that I was too busy to check if there was a nonstop
ES

Feel frustrated that flight options mean I fly, drive, out of my way
ES ES ES

Take a Preliminary Look at What It Might Cost

Take a preliminary look at the cost to get there
ES ES 1P ES 2P

thinking styles are used for

strategy

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ideas & design

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D. clarify the matrix of scenarios, with casts of characters based on different thinking styles

measure your success by their success

measure your success by their success

how people representing different thinking styles are each able to do their purpose in a manner that matches the inner thinking and guiding principles they have in common, without harm, workarounds, or frustration

rather than by Engagement, KPI, or Net Promoter Score

rather than by Engagement, KPI, or Net Promoter Score

how many people look through the glass at you

key performance indicators measure how well your org does (e.g. sales, process), not (usually) how well people can do their purpose

a number derived via nonsense math

NPS IS A WASTE OF TIME. USE THESE METRICS INSTEAD.

december 19, 2018, posted in uncategorized

Ask any executive what the top 3 metrics they watch in their company are and you'll get some combination of revenue and sales metrics and, of course, the company's NPS. Net Promoter Score, a measure of customer satisfaction and loyalty, is so widespread and common that over two-thirds of the Fortune 1000 claim to use it. It's popularity might lead you to believe it was introduced decades ago, forged in years of trial and error and scientifically tuned to become the "one metric to rule them all" in enterprise and startup alike. It turns out it was introduced in 2003 by Fred Reichhold in an HBR article called *The Only Number You Need to Grow*. In that article Reichhold rightfully sees

ARTICLES

Net Promoter Score Considered Harmful (and What UX Professionals Can Do About It)

by Jared M. Spool

In 2003, a marketing consultant named Fred Reichheld lit the business world on fire with the Harvard Business Review article The One Number You Need To Grow. He asserted that by asking a single question—a question aimed at determining the organization's customer's loyalty—management could take the pulse of their customers' feelings towards their business. He ended the article with *"This number is the one number you need to grow. It's that simple and that profound."*

For some reason, NPS thinks that a 6 should be equal to a 0. Nobody else thinks this. Remember, if you worked at a company like Intuit, all that hard work to get everyone to move from a 0 to a 6 would not be rewarded. Your executive would not get their bonus. It's as if you didn't do anything.

0 1 2 3 4 5 6 7 8 9 10

Not at all likely   **Sample Distribution**   *Extremely Likely*

Average = 8

NPS = 0

Of course, that's because you got everyone to select a six. What if you made the product better enough for each to put respond with an eight? 8, 8, 8, 8, 8, 8, 8, 8, 8, and 8.

The average is 8. Yet, NPS is now… 0.

Moving all of your users from zeroes to eights would be quite an achievement in any normal organization. But, if your organization isn't impressed with an NPS outcome of zero, no bonuses for you.

Source: https://articles.uie.com/net-promoter-score-considered-harmful-and-what-ux-professionals-can-do-about-it/

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two metrics here: harm & help (+ lenses)

1. for our priority thinking styles and key towers: how well does the solution help or harm each TS?

2. support outside our perspective: how well we are reaching outside of our unconscious bias to understand other perspectives and contexts?

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Empathetic Problem-Solver

proactively focused on interests of all employees, regardless of (dis)ability

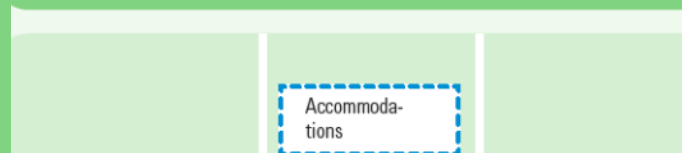I consider taking care of the people who work for me a critical part of my job. I can sense when an employee seems to be struggling professionally or personally and I reach out to them to see if there is anything I can do to help support them. I often go beyond what is in the standard "management/HR" handbook because I'm really invested in my employees and I want to do everything I can to keep them healthy and happy at work.

"The motto that I have is health and family first... you know, it's sort of nice to be able to help folks that way. And at least, you're not directly helping them but you're making their lives a little easier by not putting stress on them."

Organizational Implementer

reactive to requests of employees, focused on maintaining compliance with gov't requirements

I strive to contribute to my organization's mission and I work hard to follow its policies and processes. I maintain a professional relationship with my employees and I trust that they will let me know if they need something.

"We need to make sure what we're doing is based on the law. The challenging part is when employees with disabilities don't come forward and say something – we can't necessarily treat them differently when we would like to make sure that we're making reasonable accommodations."

DRAFT (4/20/2012)

MENTAL MODEL:

Employers and Disability in the Workplace[†]

Authors: Valerie Malzer & Sarah von Schrader
Design: Camille G. Lee
Employment and Disability Institute
ILR School
Cornell University

Project Scope Statement

Develop a model of how employers go about solving problems finding, recruiting, hiring, keeping, and promoting employees with disabilities.

Sample

This Mental Model is based on 8 interviews with Human Resource (HR) professionals (n=3), managers (n=2), and organizational leaders (n=3). Participants represented federal contractors (n=3), the federal government (n=2) and private businesses (n=2) as well as small (< 500 employees, n=3), medium (501-2,499 employees, n=2) and large (> 2,500 employees, n= 1) organizations. Private organizations were from the following industries: Manufacturing, Accommodation and Food Services, Professional and Technical Services, Finance and Insurance, Educational Services, Retail Trade.

Definitions

Mental Model: An affinity diagram of user tasks.
Tasks: Users' behaviors, feelings and philosophies.
Task Tower: A set of related Tasks.
Mental Space: A set of related Task Towers.
Mental Space Group: A set of related Mental Spaces.

LEGEND

Mental Model

Audience Segments
- Organizational/Employment
- Supervisor/Middle-level
- Self
- Regular Health (Translator)

Demographic Characteristics
- Federal Contractor
- Federal Employer
- Small Business

Current NETAC Content & Services

Product Type and Strength
- Webinar/
- Web
- Print/PDF
- eToolkit
- Training
- Tell Material
- Marketing Material
- WEAK Support
- STRONG Support

Improve Workplace Diversity

Recruit, Assess and Hire New Employees

- Recruit for Open Positions
- Assess Candidates for Open Positions
- Hire New Employees for Open Positions

Manage Employees

- Develop Employee Skills and Awareness
- Monitor Employee Performance
- Reward Employees
- Address Concerns, Performance, Misbehavior
- Accommodate an Employee
- Plan for Employee Leave
- Terminate an Employee

Address Workplace Health/Safety

Demonstrate Organizational Values

thinking style: Empathic Problem Solver

I can sense when an employee seems to be struggling professionally or personally and I reach out to them to see if there is anything I can do to help support them.

are we preferring to support one thinking style more than the other?

thinking style: Organizational Implementer

I maintain a professional relationship with my employees and I trust that they will let me know if they need something.

Realize there is a need for an accommodation to improve safety or productivity

Notice an employee seems to need an accommodation

Worry an employee with a disability might get further injured in the workplace

Realize we need an evacuation plan for an employee in a wheelchair

Worry that employees may feel uncomfortable telling me they need an accommodation

Wonder whether deaf, illerate employees understand safety policies, procedures

Talk to an employee about their accommodation request, needs

Decide who needs to be a part of conversations about accommodations

Talk to an employee about their accommodation request, need

Explain to an employee the boundaries of reasonable accommodations under the ADA

Discuss options with manager, employee, job coach, caseworker, etc.

Make sure that employees feel like I want to support them

Let employee know their request is being reviewed

Question an employee's need for accommodation

Feel skeptical about whether a particular employee's accommodation request is legitimate

Feel disgusted with wealthy employee whose only disability is addiction

Worry an accommodation might have data security impact

Accommodations

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thinking styles
purpose: personal identity change (initial study)

Spiral Up in the Thermal

My goal is clear to me, and others have established a path that I can follow. However, I have to keep fighting through barriers of self-doubt and negative comments from the people closest to me.

Escape And Explore

I am trying to get away from something uncomfort... I am exploring ... open... opportunity. I ... an identity goal, per ..., but I want to find a better way to *be*.

Chart My Own Path

I know the identity I seek, but it's a unique or uncommon goal. Thi... forging my ow... to make it happen, taking time to plan and pay attention to routes I can take.

after established success

never

thinking styles are different for every purpose

for first priority thinking styles

thinking style A

how are solutions
currently harming?

how are we helping?
how can we help more?

thinking style B

how are solutions
currently harming?

how are we helping?
how can we help more?

thinking style B

how are solutions
currently harming?

how are we helping?
how can we help more?

thinking style A

thinking style B

thinking style B

demographics lens 1

how are solutions currently harming?

how are we helping? how can we help more?

how are solutions currently harming?

how are we helping? how can we help more?

how are solutions currently harming?

how are we helping? how can we help more?

how are solutions currently harming?

how are we helping? how can we help more?

how are solutions currently harming?

how are we helping? how can we help more?

how are solutions currently harming?

how are we helping? how can we help more?

thinking style A

demographics lens 1

demographics lens 2

demographics lens 3

how are solutions currently harming?
how are we helping? how can we help more?

how are solutions currently harming?
how are we helping? how can we help more?

how are solutions currently harming?
how are we helping? how can we help more?

how are solutions currently harming?
how are we helping? how can we help more?

thinking style B

demographics lens 1

demographics lens 2

demographics lens 3

how are solutions currently harming?
how are we helping? how can we help more?

how are solutions currently harming?
how are we helping? how can we help more?

how are solutions currently harming?
how are we helping? how can we help more?

how are solutions currently harming?
how are we helping? how can we help more?

thinking style B

demographics lens 1

demographics lens 2

demographics lens 3

how are solutions currently harming?
how are we helping? how can we help more?

how are solutions currently harming?
how are we helping? how can we help more?

how are solutions currently harming?
how are we helping? how can we help more?

how are solutions currently harming?
how are we helping? how can we help more?

data from studies of how we harm/help first-priority thinking styles + lenses

HARM

ejhroe eikxj cfoiewrcefnjcf oi
djernertoifdjd vkdfg oifdiguj

kjl kenfiosdue
verif e
rficioenc

jjsjdoir vriece
xchkzcs
sdcs dcnksjd
vdvjdsfv adfja

xchkzcs
sdcs dcnksjd
cznkd vkj
vdvjdsfv adfja

kkenfiosdue very
kjlkjf e rficioenc
very kljkl
lkas werc erc wr

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fiosdue verif e rficioenc

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djernertoifdjd vkdfg oifdiguj
ejhroe eikxj cfoiewrcefnjcf oi
djernertoifdjd vkdfg oifdiguj

kenfiosdue
verif e
rficioenc

kjl kenfiosdue
verif e
rficioenc

cvaswf ewe
kenfiosdue
verif e
rficioenc

ioiuio ikjk dfseie
rnwefh sodiufkjnwlk
ef wef lkjlkjqe

systemic serious mild

systemic serious mild

HELP

kken lkj
mondu tkhewq cdsoi
oisu jasdo dos

kken lkj
fiosdue verif e rficioenc

bene rficioen
dkj lkdfie kjwmn
ljdc

lkjdf adsfj alsd
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purpose: trying to lose weight

Resigned

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.
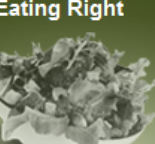
Emotions, Stress & Food	Thoughts & Self-Image	Feeling Stuck
○ Start »	○ Start »	○ Start »

Exercise Your Way	Eating Habits
○ Start »	○ Start »

Stressed

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.

Making Diet Programs Work	Barriers and Slip-Ups	Eating Right
○ Start »	○ Start »	○ Start »

Food Habits	Getting Active
○ Start »	○ Start »

Sidetracked

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.

Eating In	Eating Out	Slipping Up
○ Start »	○ Start »	○ Start »

Beating Stress	Reaching for Your Goal	Staying Active
○ Start »	○ Start »	○ Start »

Segments: Healthwise, Becky Reed

adjustable support (e.g. using machine learning)
(searching for examples of this)

digital maturity in 10 years?

machine learning: match a person
with an experience designed for an existing
thinking style

(or admit to the person this is a "generic"
experience) (… which is what most
experiences are right now, without letting
the user know)

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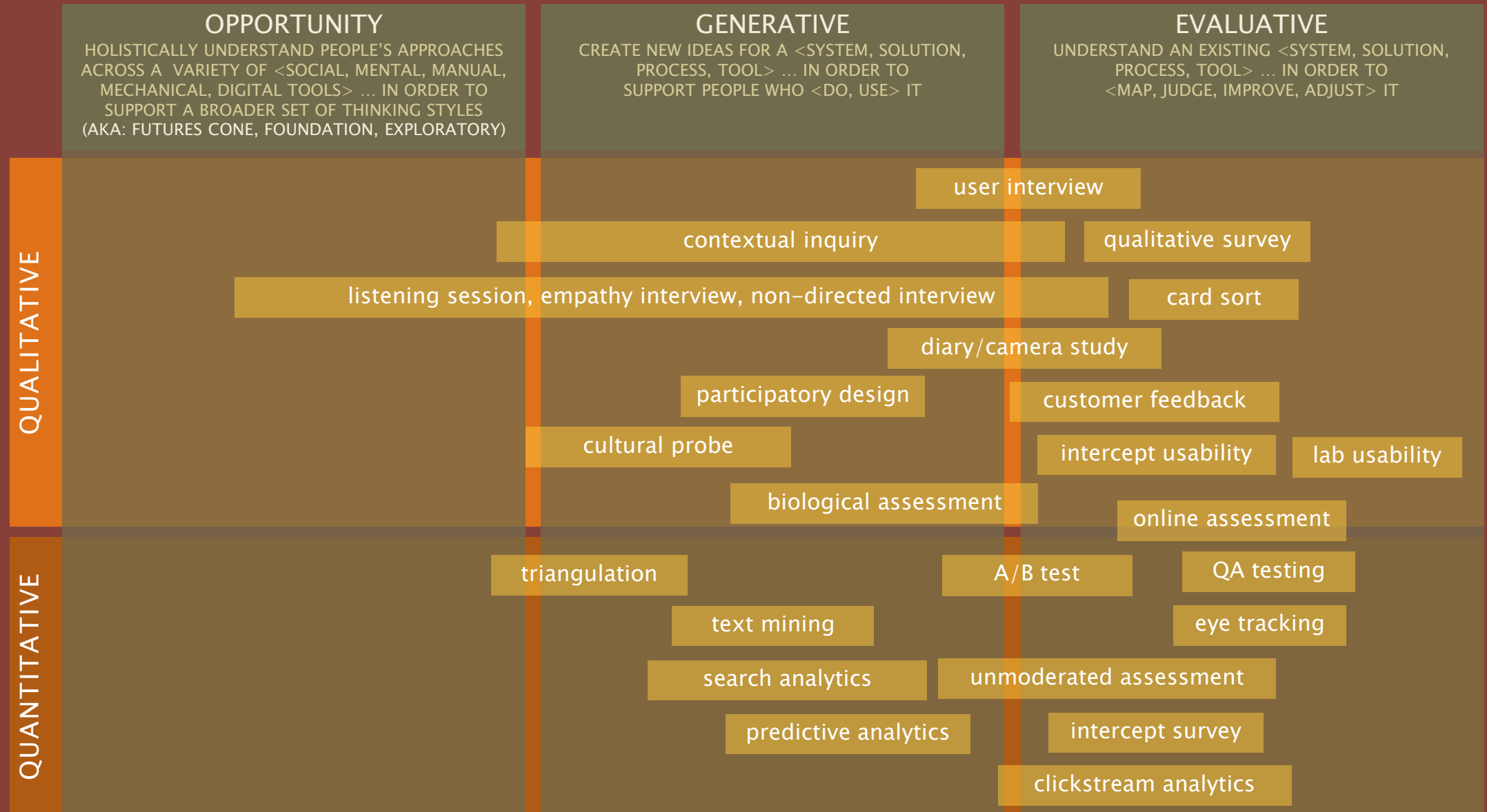
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values (measurements) for the metrics come from:

1. (strong) frame other studies by tower + thinking style (usability tests, surveys, data models, etc.) and map to the opportunity map
2. (strong) ask study participants (by thinking style) what went through their mind (harm & help) as they did their purpose using your solution, and for which parts of their purpose your solution was not used
3. (strong) put the demographics lenses in front of the thinking styles for half the studies

Source: Guillermo Ermel, posted in Slack channel #ongoing-project-discussions

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KNOWLEDGE CREATION (data collection techniques)

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

OPPORTUNITY
HOLISTICALLY UNDERSTAND PEOPLE'S APPROACHES ACROSS A VARIETY OF <SOCIAL, MENTAL, MANUAL, MECHANICAL, DIGITAL TOOLS> … IN ORDER TO SUPPORT A BROADER SET OF THINKING STYLES
(AKA: FUTURES CONE, FOUNDATION, EXPLORATORY)

GENERATIVE
CREATE NEW IDEAS FOR A <SYSTEM, SOLUTION, PROCESS, TOOL> … IN ORDER TO SUPPORT PEOPLE WHO <DO, USE> IT

EVALUATIVE
UNDERSTAND AN EXISTING <SYSTEM, SOLUTION, PROCESS, TOOL> … IN ORDER TO <MAP, JUDGE, IMPROVE, ADJUST> IT

QUALITATIVE

- user interview
- contextual inquiry
- qualitative survey
- listening session, empathy interview, non–directed interview
- card sort
- diary/camera study
- participatory design
- customer feedback
- cultural probe
- intercept usability
- lab usability
- biological assessment
- online assessment

QUANTITATIVE

- triangulation
- A/B test
- QA testing
- text mining
- eye tracking
- search analytics
- unmoderated assessment
- predictive analytics
- intercept survey
- clickstream analytics

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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

the problem with most scenarios

which thinking style?

which purpose?

storyboard

the problem with most scenarios

which thinking style?

which purpose?

1 Child's Doctor / Emergency

However you come to Children's, know what kind of care you can expect, how to find us and who to talk to first.

2 Scheduling

Schedule your appointment in just one phone call, at a time that works for you.

3 Clinic visit

Expect that your visit goes smoothly and that you're in and out without waiting.

4 Before Surgery

Receive and understand all the information you need before your child's surgery.

5 Surgery

We'll start the surgery right on time.

9 Follow-up visit

Your appointment will begin on time.

8 Going Home

Have all your questions answered and get clear instructions on how to care for your child.

7 Inpatient Care

Know when you can go home.

6 After Surgery

Your child will move to a hospital room or go home as soon as they are ready.

the problem with most scenarios

which thinking style?

which purpose?

be aware: solution space

CUSTOMER JOURNEY MAP THROUGH "RED & WHITE"
This journey map documents the experience of an irregular shopper
at the Red & White Grocery Store in Habersham Village.

PROMPT: Need for Food | PARKING | ENTER | SHOPPING THROUGH AISLES | CHECKOUT | EXIT | TAKEAWAYS Groceries, Receipt
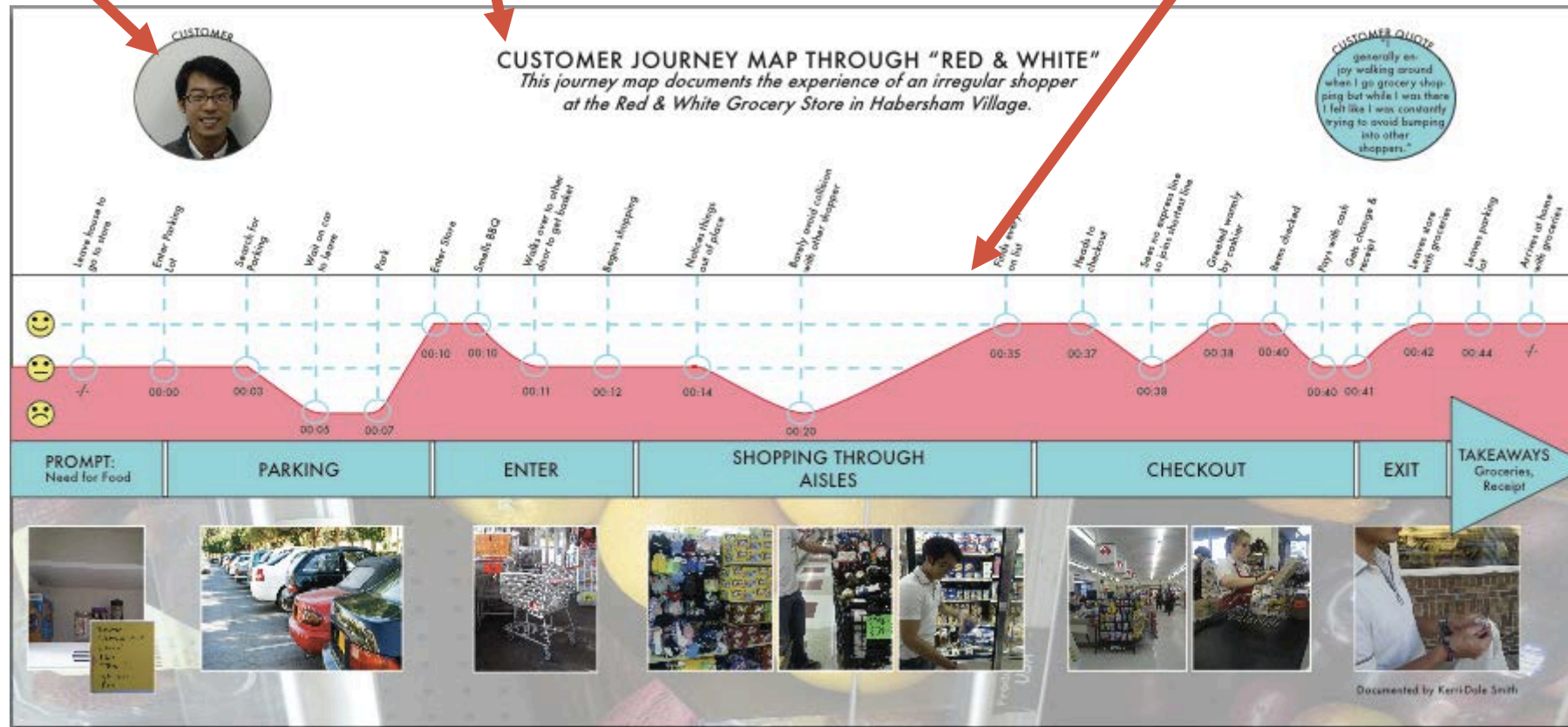
"I realized the user story maps, scenario based workflow ... were arbitrarily produced. Where was that data at? ... I didn't like that we were conflating research and what was our own ideas. I brought on the idea of mental models."

-Mathias Burton

scenarios are about purpose, not usage

problem space

person = has their own way to achieve the purpose that you can support

strategy

bridge to other methods

solution space

user = someone with a relationship/potential to your org

mental model diagram
(aka "opportunity map")

+

thinking styles

scenarios live here

ABOUT ONCE A YEAR

find patterns

listen

PEOPLE

develop empathy
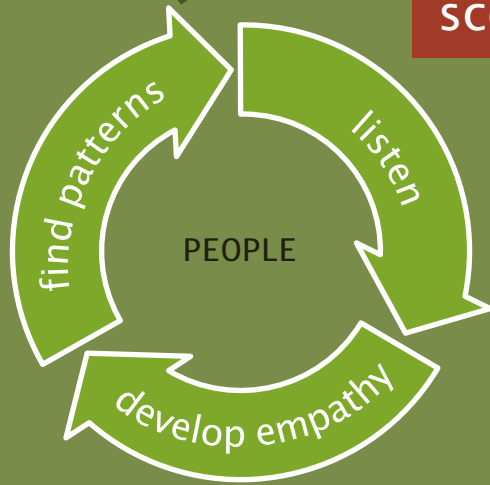
Create a single source of knowledge (and potential futures) across units.

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.

CONTINUOUS DUAL TRACK

prototype

PRODUCT DISCOVERY

hypothesis

ideas
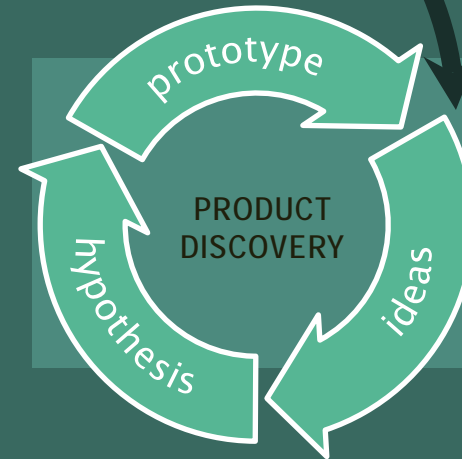
product backlog
validated user story
+ prototype

plan

PRODUCT DEVELOPMENT

review

sprint
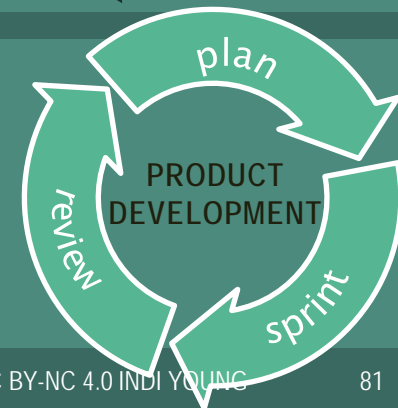
like an extensive cast of characters
in an episodic tv show

locations

apartment scene

characters:
- Penny
- Leonard
- Sheldon
- Amy

work cafeteria scene

characters:
- Leonard
- Sheldon
- Raj
- Howard

comic book store

characters:
- Stuart
- Leonard
- Sheldon
- Raj
- Howard
- Captain Sweatpants

allow the cast of characters to grow over time

for stakeholders across the org:
- release a minimum subset of thinking styles as scenarios, only for the for high priority market segment + thinking style combos

for the strategy & design team:
- curate all the thinking styles and scenarios

scenario =
     tower(s) + thinking style + context

scenario =
     tower(s) + thinking style + lens +
market segment + context

scenario =
    tower(s) + thinking style + context

part of the approach
to the purpose

might use character
name

the background of the story
(time of day, weather,
location, other people, etc.)

Engaged

I'm already planning my next trip.

I love travel. I'm entranced by places to go and people I might meet. I am intrigued by the plane and how pilots and crew pull everything together. I add a side trip to my business travel to check out a new place. A long layover means time to explore the airport. I get to chat with the employees. Travel helps me break out of the routine.

Unfazed

I'm prepared for anything to happen.

I want my travel to be stress free and drama free. I've arranged contingencies for all the scenarios I can imagine. Long security line? I show up an extra hour early. Flight delays? I brought stuff to do. Food? I bring something on board. You can throw anything at me. I will even extend my zen state of mind to others, helping them deal with any drama.

Frustrated

Travel isn't going as I had planned.

Everything that can go wrong will go wrong. There's always something: I get singled out in security or the flight is delayed or my luggage flies to a different destination than me. The airline drops the ball and I'm forced to remedy the situation. It takes hours that I'd rather spend doing what I had intended.

Get It Over With

I'm trying to minimize my travel time.

I want to accomplish everything, so I set up a tight schedule on my travel day. I have appointments or events I want to hit before and/or after the flight. Or maybe I'm uncomfortable on planes. Or I don't want to spend too much time away from my home and family. I'm prepared to bury myself in my work or another distraction while on board.

scenario =
minimize the travel time +
get it over with +
one day business trip

scenario =
    figure out how to get there +
    engaged +
    international business trip

scenario =
agonize over finding the best choice +
engaged +
trip of my daydreams to Vietnam

scenario =

weave some of the inner thinking, reactions, and guiding principles from the boxes marked as "engaged" in the tower "agonize over finding the best choice" on the warp of the context of the Vietnam dream trip

walk in shoes

first person, present tense

mental space, towers
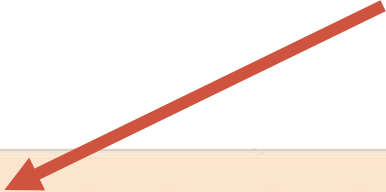
	Decide/Agree to Take a Trip		Figure Out Dates, Duration, Destination, Activities, Participants										Choose How I Will Get The
	Seek Out Unique, Memorable Experiences	Agree to Business Travel	Pick Dates for the Trip	Decide How Many Days for the Trip	Research Some Activities There	Consider Whether to Fly or Not	Decide When to Spend Time Making the Reservation	Gather a Bunch of Flight Options	Compare Flight Options	Minimize Travel Time	Factor in Enough Time on Day of Travel	Maximize Usable Hours Before / After the Travel	Choose Particular Airline to Have Access to Better Seats, Privileges because of My Status
Engaged Bargain Hunter	yellow		yellow	yellow				yellow	yellow			yellow	
Unfazed Luxury		yellow	yellow		yellow						yellow		
What About Me? Almost Elite		yellow			yellow		yellow	yellow	yellow				yellow
Get It Over With Schedule Sensitive		yellow	yellow			yellow	yellow	yellow	yellow		yellow	yellow	

yellow means scenario

thinking style + marketing segment (explained earlier)
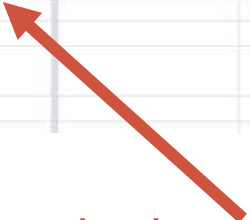
airline scenarios matrix

mental space, towers

	A	B	C	D	
1			Decide/Agree to Take a Trip		
2	*These cells are whe*	Character N	Seek Out Unique, Memorable Experience:	Agree to Business Travel	Pick Dates f
3	Engaged Bargain Hu	Amy	I've finally decided to just do it and book a		I start lookin
4	Unfazed Luxury	Isaac		I am walking down the hallway in the after	
5	What About Me? Aln	Ethan		I find out this morning that my application	
6	Get It Over With Sch	Dominique		My supervisor told me I have to attend a t	
7					

here is where you can add character names

airline scenarios matrix

	A	B	C	D	
1			Decide/Agree to Take a Trip		
2	*These cells are whe*	Character N	Seek Out Unique, Memorable Experience:	Agree to Business Travel	Pick Dates f
3	Engaged Bargain Hu	Amy	I've finally decided to just do it and book a		I start lookin
4	Unfazed Luxury	Isaac		I am walking down the hallway in the after	
5	What About Me? Aln	Ethan		I find out this morning that my application	
6	Get It Over With Sch	Dominique		My supervisor told me I have to attend a t	
7					

I am walking down the hallway in the afternoon when my boss steps out of his office and says, "Hey Jeff, you wanna go to Palm Springs to check up on that construction project there?" I ask, "When are you thinking I should go?" "Tomorrow," says my boss. I pause, because I am really looking forward to a golf game I have scheduled for tomorrow in the late afternoon. It is the "championship" of my informal group of friends. I know my boss loves golf, and we have a solid working relationship, so I go ahead and ask him, "Well, I've got an important golf game tomorrow. Would Friday morning work?" My boss cocks and eyebrow and looks steadily at me. "Okay, tomorrow. It's one of our important projects," I concede. No problem, I think. Golf games are always getting canceled. Also, it will be good to talk to Karl out in Palm Springs about that vendor he's had trouble with. Maybe while I'm out there I can go talk to that vendor, himself, and try to find a solution to the problem they're having.

A	B	O	P	R	T
		Choose How I Will Get There			
These cells are whe.	Character N	Choose Particular Airline to Have Access	Choose Particular Airline to Earn N	Agonize Over Finding the Best Choice	Choose the Cheapest Transportation F
Engaged Bargain Hu	Amy		I'm happy that United is one of the	Why isn't there a cheaper Star Alliance or	So I look up on Kayak a date in mid-Oc
Unfazed Luxury	Isaac	My travel specialist has all my information			
What About Me? Alr	Ethan		I fly a lot on United, so I look at the		
Get It Over With Sch	Dominique			I feel sure the Delta flight will get me there	

I'm happy that United is one of the options Kayak lists, which would mean I can add the miles to my account. Someday I'll have enough miles to bring my mother along with me. She has always w much of a chance. But, the United option is not the least expensive. Scanning the list, it looks like Korean Air has the cheapest fare. I wonder if they are a member of the Star Alliance, so the milea Star Alliance member airlines, and they aren't on the [list. Singapore Airline and Air China seem to be the only Asian airline. The do both appear in the Kayak results, but the United fare is cheaper. [Flight Options paragraph]

Why isn't there a cheaper Star Alliance option? Is Korean Air a good airline to fly on, worth the $200 cheaper price? I spend more time looking up the reputation of Korean Air. ... The only dates this Wed 17-Oct and returning on Wed 31-Oct. Oh no, that would mean more than 11 days. [skip to Choose Cheapest paragraph]

So I look up on Kayak a date in mid-October and get the range of prices a few days before and after that date. I turn off all the options that result in higher prices. In the matrix, it looks like Tuesda Thursdays are cheaper than the other days. [skip back to Choose Particular Airline paragraph] ... [continue here after Agonize paragraph] No wait, it's exactly 11 days! Perfect! Okay, I will go with K savings. Let's see if it's even cheaper tomorrow, when the fares are posted. ... It's Tuesday morning and I'm checking the fares again on Kayak. A lot of these prices haven't changed. Korean Air is Book Directly paragraph]

Thinking Styles
Engage
Values
Purpose
Dark Over Here

Data Layers

Travel hours accounted for- effecting time one has to take off from work, or not if on a weekend, overnight travel or daytime, inactive trip daylight

Covid related info-safety; travel restrictions, flight length, time exposed, quarantine on arrival, arrival transport options

Weather- delays arrival/departure, considerations of what to do, what can be done while there

MM The general approach was to find opportunities to innovate in terms of business strategy or brand along with the product changes/improvements.

Opportunity Stories

Frustrated: I have to fly to Houston. TX to see an important client on Friday morning and I want to get home as soon as possible. My daughter's birthday party is on Saturday and I have to pick up the food, decorate the house, plus catch up on work that I missed while I was gone. I've never flown out of Houston, but I'm worried because I've read there are often flight delays because of the weather and the weather reports say it's usually stormy this time of year. Everything better go according to plan or else I'm going to lose it! I'm scheduled to arrive on Thursday night and leave on Friday evening, right after the meeting. It's the last flight out that day and if I miss it, it will ruin everything!

Capability (Ideas+Gap Analysis)

NB -This solution can fit all thinking styles

"I need to unwind for a day before my departure flight"

"I just need to easily figure out days I am away and days I need to quarantine and days I have to take off"

Lauren

Thinking Style: Engaged

Gap Analysis
The necessary collaboration involved with group travel appears to be most underserviced on email threads, text messages, having to follow up with the people you travel with. It seems to become a small project management tool.

Org: Startup with a consumer product, as well as a B2B offering that they sell to their service.

making thinking styles from existing data

you can try to use existing data sources to create thinking styles:

- user interview transcripts
- call center / customer service transcripts
- essays or diary entries people have written about their inner thinking
- ethnographic notes from field research (but these will be in third-person)

never use survey data—answers are pre-invented

few of those sources have as much depth as a listening session:

listening session: 40–120 concepts
    user interview: 4–16 concepts
        ethnography: 20–90 concepts (depends on skill)

be aware: you will probably need to rely on implied concepts

(implied concepts are summaries created from what you guess the person meant to communicate, which has to be a solid guess based on how well you understand this person's inner thinking, etc.)

how to use existing data to create thinking styles:

1. choose a purpose to focus on

2. then select parts of transcripts across studies depicting that purpose

3. look for inner thinking, emotional reactions & guiding principles in the transcripts

4. write participant sketches (~10 strongest guiding principles & inner thinking)

5. do the thinking styles working session

6. compare the sketches to current segments and personas

or you can try converting existing personas by a re–shuffling & re–write

only if they were based on good data … that you can get your hands on to check the quality

(see the test for this a few slides back)

"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
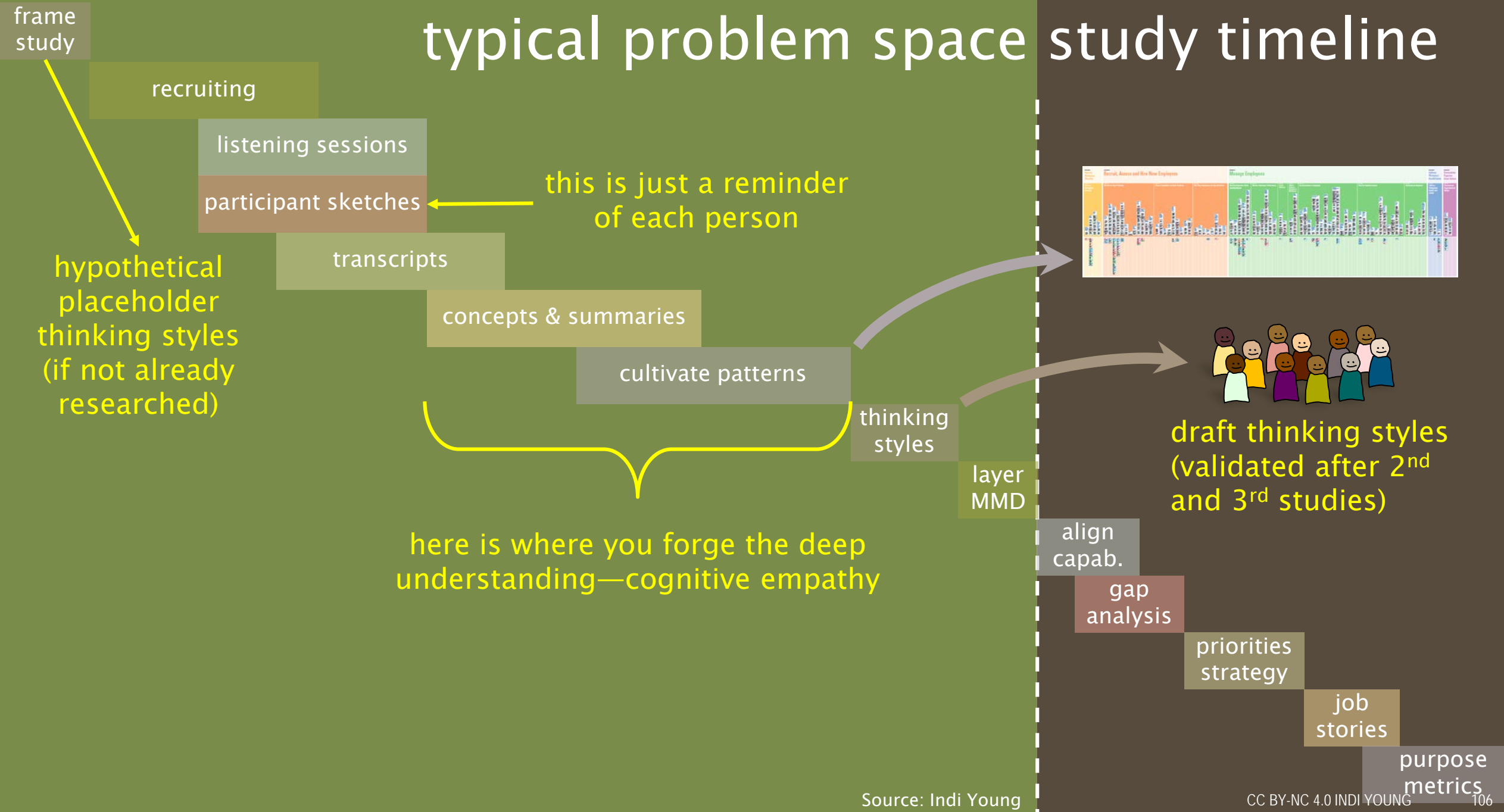+ Retire and have the option to settle wherever she wants

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

it's better to just do the listening sessions because you will not be guessing about what is implied, and you will have richer depth in the transcripts

some logistics

typical problem space study timeline

frame
study

recruiting

listening sessions

participant sketches ← this is just a reminder
of each person

hypothetical
placeholder
thinking styles
(if not already
researched)

transcripts

concepts & summaries

cultivate patterns

thinking
styles

layer
MMD

here is where you forge the deep
understanding—cognitive empathy

draft thinking styles
(validated after 2nd
and 3rd studies)

align
capab.

gap
analysis

priorities
strategy

job
stories

purpose
metrics

Source: Indi Young

typical problem space study timeline

frame study

recruiting

listening sessions

participant sketches

transcripts

concepts & summaries

cultivate patterns

thinking styles

layer MMD

IF YOU ARE UNDER DEADLINE/TIME PRESSURE
you can skip to thinking styles directly
you will try to record high priority concepts

… meaning your filter bias will skew the
thinking styles, so you must constantly check
for it and review which concepts you selected
… and validate with further studies

draft thinking styles

in this case, adding more studies is key to validation

align capab.

gap analysis

priorities strategy

job stories

purpose metrics

Source: Indi Young

recap

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

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

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

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

43 articles   + Follow

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

Source: Megan Davis "The Customer Is Always a Character: Characters for Personas https://www.linkedin.com/pulse/customer-always-character-characters-personas-megan-davis/

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

build awareness
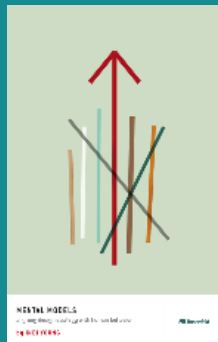
build intentionality

build relationships

model it for others

feedback for indi:

https://goo.gl/forms/6CvKjFk9VZjuRK5l1

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