



CONCEPTS & SUMMARIES

PART 1: UNDERSTANDING WHAT WAS SAID

Advanced Training Course
Class #1
@indiyong

concepts & summaries

session 1: building blocks

bias-free understanding of people
recognize a concept
introducing summaries

session 2: it's complicated

write a clear, concise summary
concepts get repeated

session 3: but not impossible

clarify the summary
recasting & traps to avoid
tangled concepts & implied concepts

session 4: some logistics

merging, splitting, pruning
team work
lightning-quick and from-memory

housekeeping

Slack channels in the indiyoung workspace:

- # 1-listen-deeply
- # 2-summarize-concepts
- # 3-cultivate-patterns
- # 4-thinking-styles
- # 5-mmd-oppmap-usage
- # 6-frame-your-study

- # chat-and-intros
- # indi-announcements
- # language-culture-differences
- # ongoing-projects
- # persuade-your-stakeholders

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

indi-announcements

language-culture-differences

#2-summarize-concepts ☆

Add a topic



112



Hi, @Cindy Merrill! Glad to see you here

Friday, February 5th ▾



3 replies Last reply 1 day ago

Saturday, February 6th ▾



indiyoung 10:18 AM

Hi everyone, and welcome!! 🎉 I would love to know more about where you're coming from, with respect to qual data analysis. What's your context? Vote for as many emoticons as you like, and add comments in this thread.



My org doesn't trust/do much qual research



I've been doing qual research for 10+ years



And I find myself still having to explain its value



And I've empowered a team/stakeholder or two with qual data insights



And I'm in need of a better way to explain it



And I'm frustrated by how "random" the affinities/insights feel



And I'm leading a team



And I'm good at this!



14 replies Last reply today at 4:57 PM

prerequisites for Concepts & Summaries:

- understanding of listening deeply
- understanding of listening sessions for data collection
- watch one of Indi's latest recorded Talks
- listen to one of the latest Other Recordings

recommended reading for Concepts & Summaries:

- chapter 5 in *Practical Empathy*

Wed classes will be recorded:

- Indi asks your permission at start of each class
- if you would rather not, please attend the Fri/Sat class

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

each week you can choose either class meeting:
Group A (Wed) or Group B (Fri/Sat)

according to your own shifting schedule

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

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

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 certification if you do the homework)

I will stop at certain points to ask for questions

the follow-along recording is hosted on the indiyoung.com platform under My Courses/...

- I upload it to the 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: 3 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

(too difficult to review homework retroactively)

building blocks

unconsciously biased understanding of people

Whew! The hard part is over. Now that we finished the interviews, let's synthesize our insights.



Wait, I thought we *did* that during the interview itself?!

After completing the final interview in a study, most teams feel a sense of triumph ... and exhaustion.

The *first* hard part is over.

Now it's time for the *second* hard part: qualitative data analysis.

three ways to allow bias, miss patterns, and ignore externalities in qualitative data analysis:

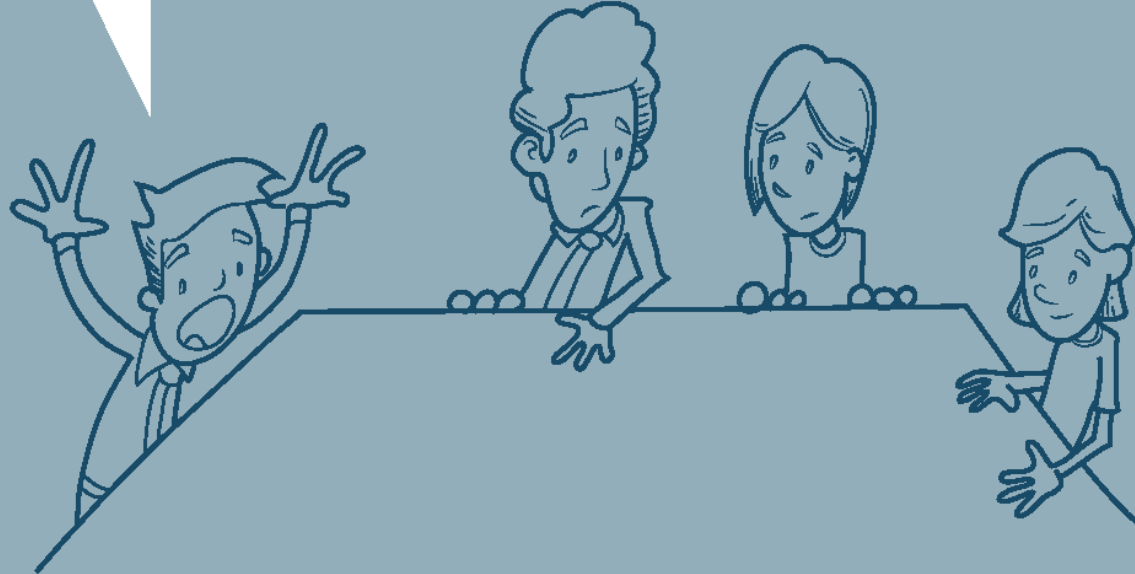
1. insights that stood out
2. lens of the solution
3. coding the transcript

three ways to allow bias, miss patterns, and ignore externalities in qualitative data analysis:

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We have to work within our development cycle. We're running quick, lean & mean.

Give me the key pain points. I need some quick insights. Some trends.





Get started



HOME

CAREER

RESOURCES

TRENDS

ABOUT

AR

individual pieces of data.” In Human-Centred design, the goal is to make the individual learnings group knowledge.

HOW TO DO IT?

One way of starting to make sense of your data is to share with your team the most inspiring stories you’ve heard from the people you’re designing for. Think about user stories or experiences that have stuck with you: stories which surprised you, made you curious, or verified or falsified your assumptions. As you listen to your teammates’ stories, write down notes and observations on Post-its.

By the end of this step, you will have hundreds of post-it notes on the wall organized around each research activity.

many teams share out anecdotes ...
... things that resonate
... things they heard frequently

when creating this list, it takes a well-trained
mind not to fall prey to **cognitive bias**

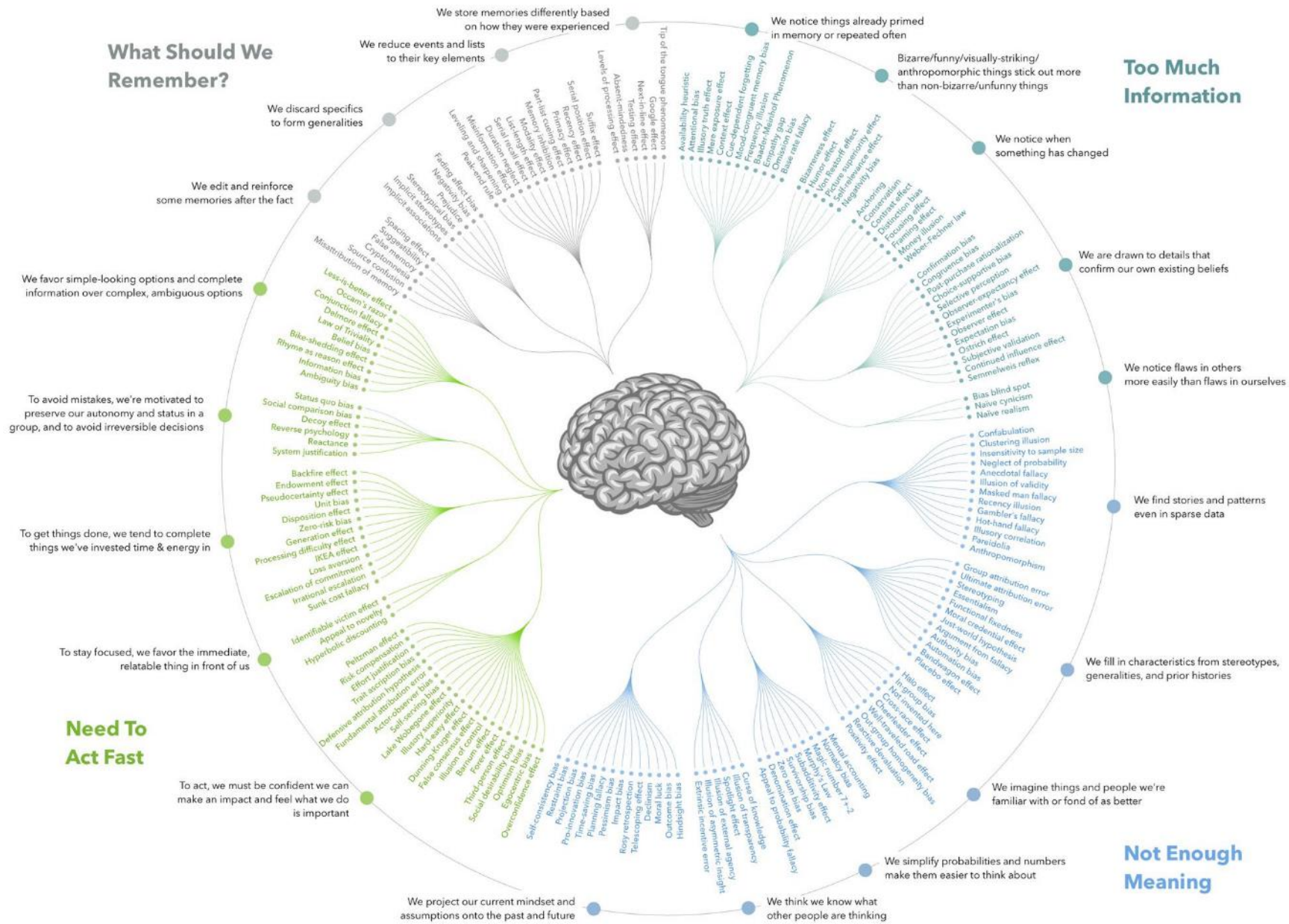


your brain picks out patterns in data

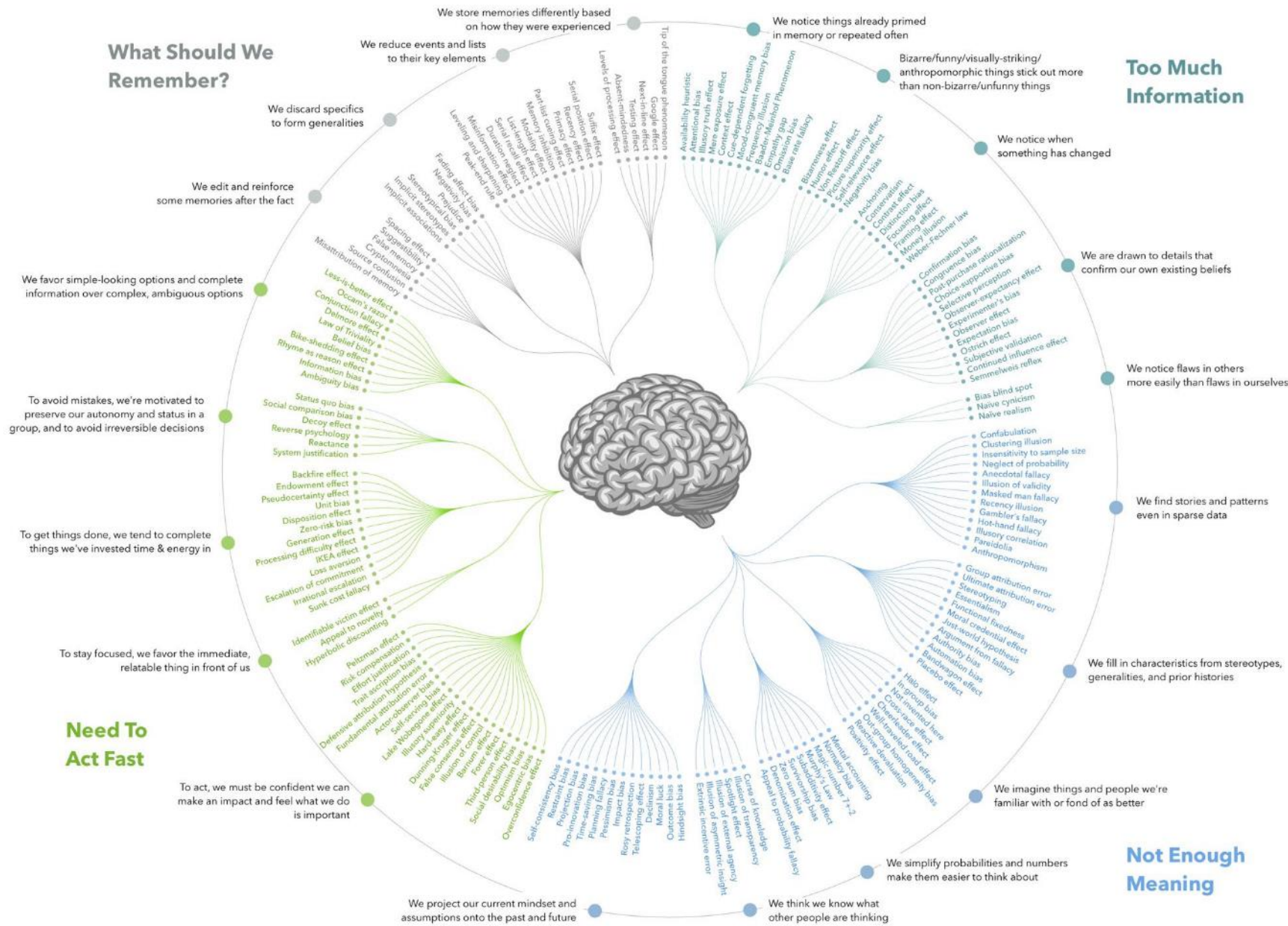
assuming what you see is true



COGNITIVE BIAS CODEX, 2016

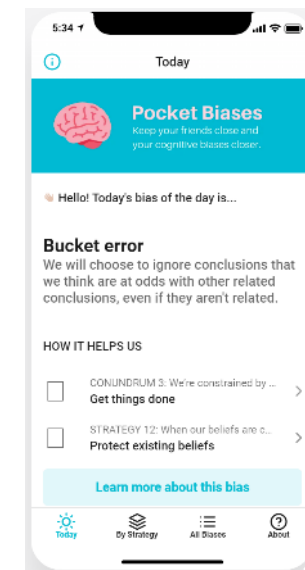


COGNITIVE BIAS CODEX, 2016



apparently he has changed it to three categories since 2016

... and he's made an app, Pocket Biases, that helps you recognize your biases in the moment



it's also because of

nouns

many teams share out anecdotes ...

... things that resonate

... things they heard frequently

when creating this list, it takes a well-trained
mind not to fall prey to **cognitive bias**

it's also because of

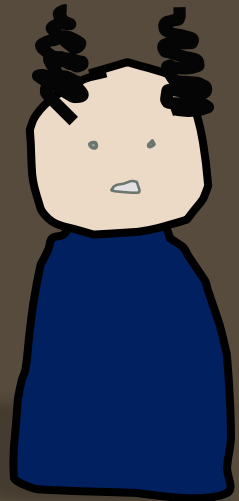
nouns

the “things” on the minds of the team ... tend
to be the “things” the org is focused on

usually described with **nouns and adjectives**
... from the org's perspective

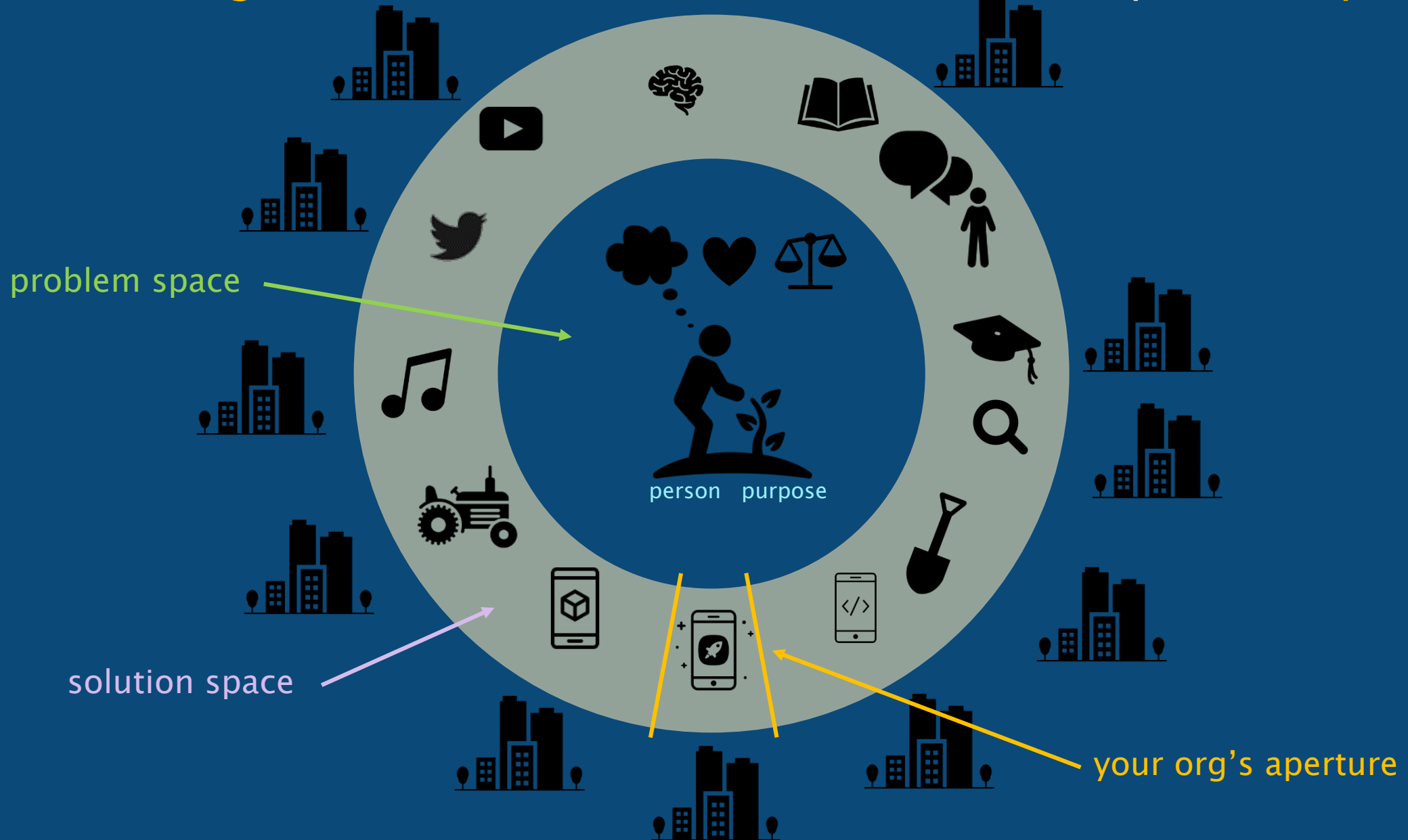
three ways to allow bias, miss patterns, and ignore externalities in qualitative data analysis:

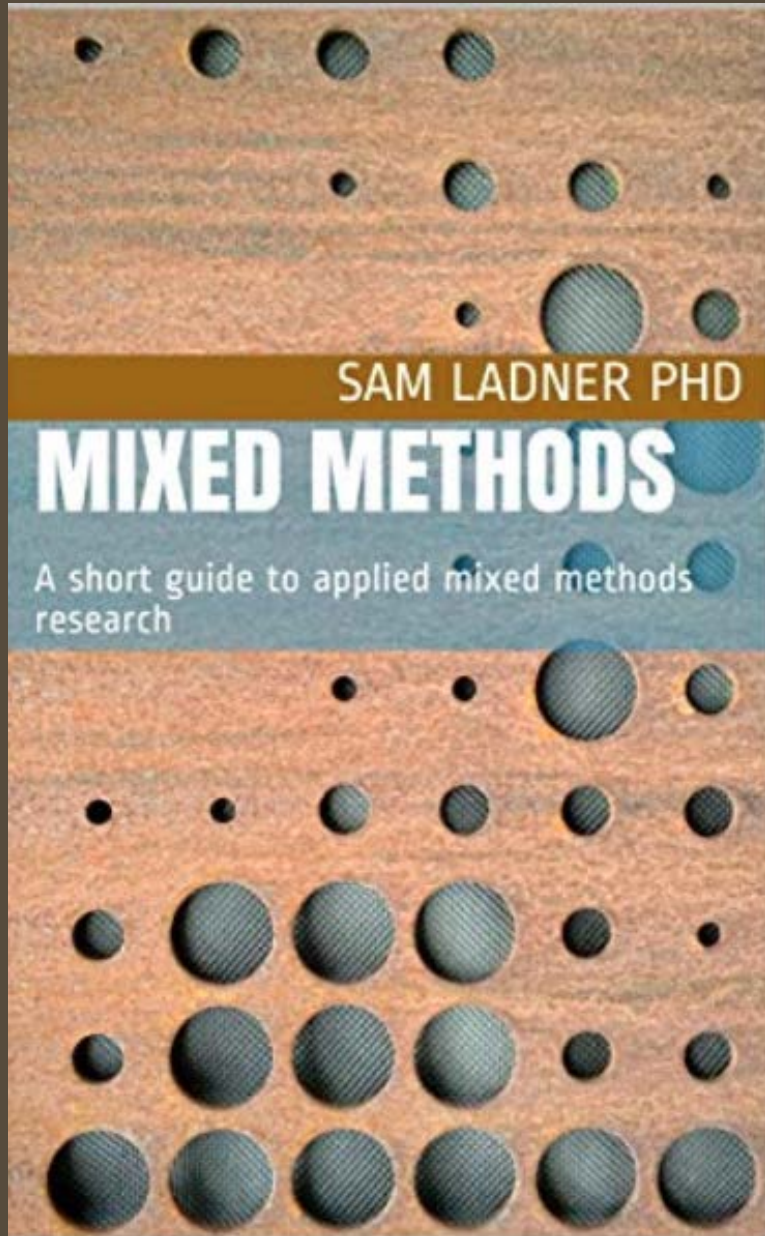
1. insights that stood out
2. lens of the solution
3. coding the transcript



for anyone coming at the purpose-driven space from a career of focusing on users, ideas, and solutions, **it's tough to think about a person's world** without the lens of the products

there is an **org** behind most of the **solutions**, which compete with **your org**





“Our stakeholders are unfamiliar with the **constructivist** perspective and ask only for **scale and causation.**”

“If you are a **qualitative** researcher, you should double down on the strengths the **constructivist** approach provides.”

actual definitions



quantitative

subjective = perceived
(NPS, satisfaction survey)

quantity, amount, scale

empirical = verifiably observed
(cart abandonment, GPS trace)



qualitative

subjective = perceived
(stories, anecdotes)

pattern consistency,
participant focus,
inner thinking

empirical = verifiably observed
(patterns of thinking in context)

cyclic
renewal



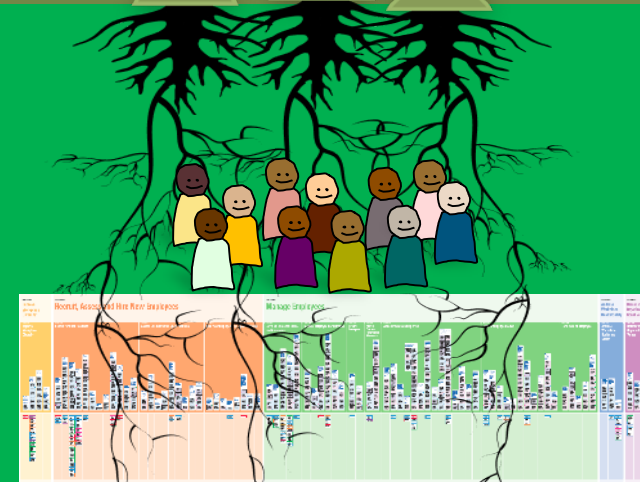
yearly
growth



business wants to be risk-free, so they reach out to “science” to feel more certain

... but they think only quant data is empirical

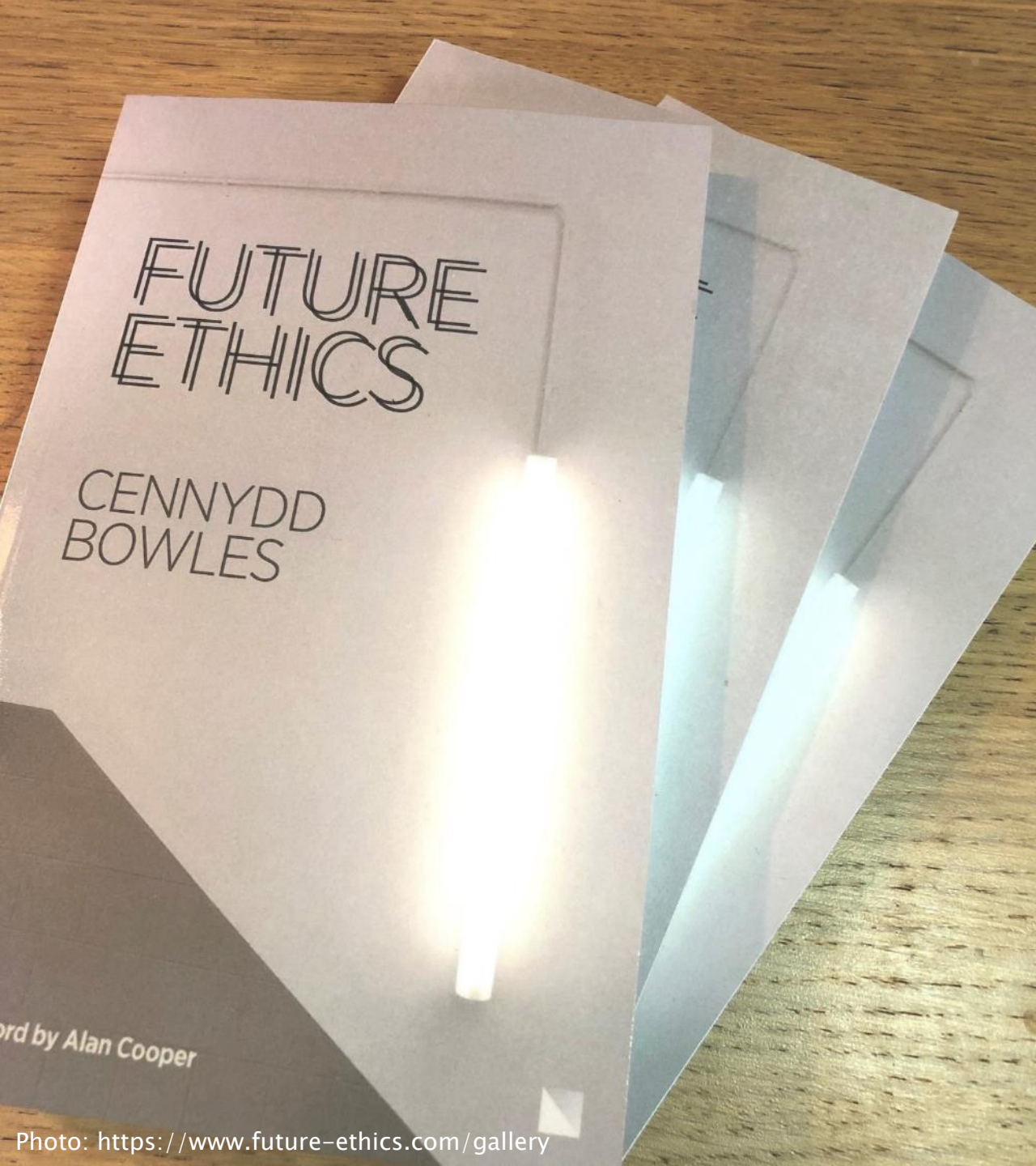
to be risk-free, business must deeply explore the people they hope to support, once a year or two



thinking styles
+ mental model
(aka “opportunity map”)

listening deeply





in the tech world
experimentation *is their research*

“An institutional review board (IRB) would rebuff academic research this sloppy ... Users are given no right to withdraw from studies. Children are routinely included in experimental populations. Informed consent is brushed aside, supposedly replaced by an excusatory sentence in the terms of service...”

ord by Alan Cooper

Photo: <https://www.future-ethics.com/gallery>


unintended consequences – outcomes you overlooked or decided not to foresee ... affecting “familiar” people

externalities – an effect that happens to someone outside the system ... happening to people we ignored

nonetheless, stakeholders want outcomes/insights they can feed directly back into the idea/solution cycle

so you analyze transcripts into lists of:

- attributes
- behaviors
- motivations
- frustrations
- beliefs
- goals
- needs



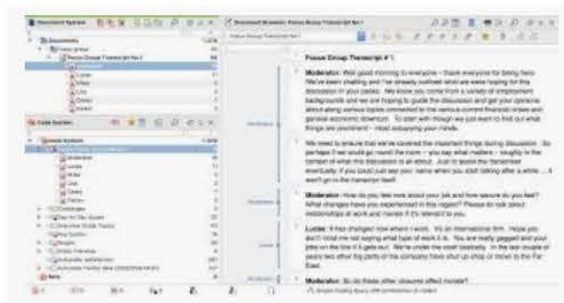
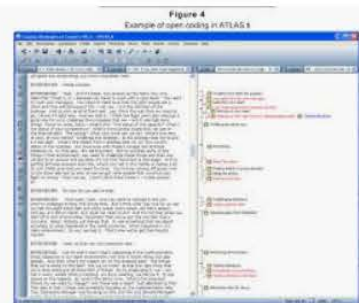
feels like the best way of framing these is to use aspects of the existing solution

three ways to allow bias, miss patterns, and ignore externalities in qualitative data analysis:

1. insights that stood out
2. lens of the solution
3. coding the transcript

Story fragment	Student's response	Coding
1. The three friends	[Reads aloud] The three friends. [Laughs] The little pig. Like those comic characters: Harry, Dewey and Louie.	OTM ASSO ASSO
2. Once upon a time there were two friends who found a third. Liking no one better in the whole world. They vowed to live in one palace, sail in one ship, and fight one fight with equal arms.	[Reads silently] [Laughs] It is not really a nice beginning. [Reads aloud] "Two friends who found a third". A palace. So they must be rich. [I was thinking ... [invisible words]	EKO EVA OTM INFER OTM

Excerpt from transcript (quoting by interviewee)	Interpretation	Category	Theme
Q How do you go about the documents you receive from the management and the programers, do you make your own documents or use just the documents given to you? A 1. We get each document and compare it that is the design documents from the programers and the original documents from the management. We will check for what is missing and add something to it such as comments, change and so on. 2. Though I have to go through anything on the original document from the beginning for proper understanding to ensure that the design part from the programers matches the original documents which is the program requirement description (PRD). 3. Our communication channel is from the programers to the users and from users to the project managers.	1. How testing process is conducted 2. Tester/CA depends heavily on the document passed to them. 3. Communication of test process to user.	1. Testing Strategy 2. Documentation 3. Communication	1. Information 2. Problem 3. Problem



1	2	3	4
1. I am very happy to be a volunteer. I am very happy to be a volunteer. I am very happy to be a volunteer. I am very happy to be a volunteer.	2. I am very happy to be a volunteer. I am very happy to be a volunteer. I am very happy to be a volunteer. I am very happy to be a volunteer.	3. I am very happy to be a volunteer. I am very happy to be a volunteer. I am very happy to be a volunteer. I am very happy to be a volunteer.	4. I am very happy to be a volunteer. I am very happy to be a volunteer. I am very happy to be a volunteer. I am very happy to be a volunteer.

Example of a coded transcript fragment ... researchgate.net

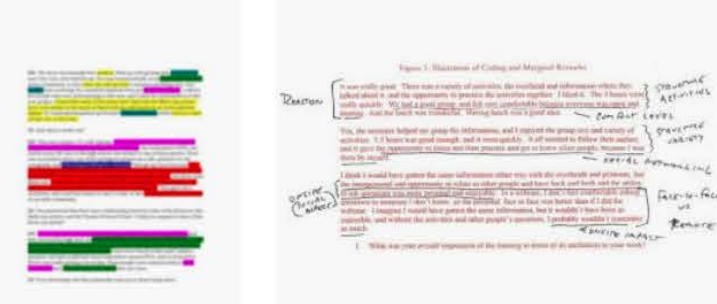
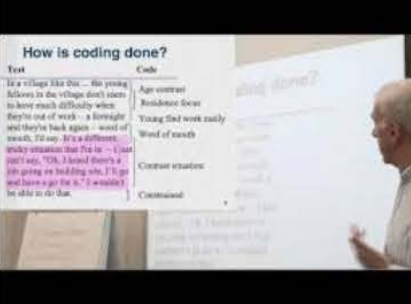
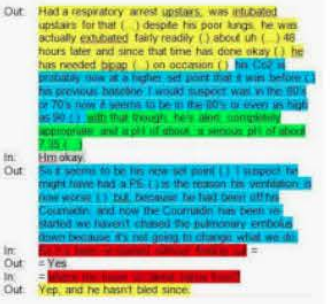
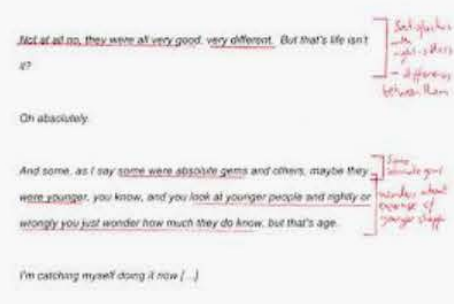
CODING APPROACH EXAMPLE USED IN... researchgate.net

NVivo 10 for Windows ... forums.nvivoqsr.com

Focus Group Transcripts - MAXQDA - The ... maxqda.com

NVivo 11 for Windows Help - About ... help-nv11.qsrinternational.com

Table 4. Comment examples.	Example comments [hit?]
Magnitude coding	• you are so nice. i hope this year goes great for you • i LOVE your videos
Positive (supported)	• Miss great vid. It's definitely interesting to hear about these differences from a first hand account. • Do you own A horse because it looks like you cut its hair and put it on or head. • wow or a loser • This video only exposes your own reality... i can only hope that with increased age your will grow in maturity.
Negative (nude or critical)	• What's freshers Friday! • You start school already! • lol too bad u have to start school in august. i start september =D lol
Neutral (opinion or statement)	• I am funny and pretty but i think i r a little weird just like my best friend keep doing those videos r rock • Hahaha. You think high school has hard teachers? wait til you get to college. lol i grew Amer. Government in High school was a job. Always nice blog. • Your aunt is a beautiful person. i think the video is horrible.
Mood (combesation)	



Coding examples from SAGE journals ... study.sagepub.com

Sample transcript and coding ... research.hud.ac.uk

coded transcript according to S... researchgate.net

Coding Part 2: Thematic coding - YouTube youtube.com

Coded Transcript Exam... coursehero.com

Data Coding & Scoring in Marketing ... study.com



Interaction/Code example	Example quote
Tier 1 Code: User/Topic Tier 2 Code: Facilitation Tier 3 Code: Patient Report, Reference (The subject makes a statement regarding the assist to assist the patient report is personally relevant.)	RESPONDENT I feel that for the one with the book, that I don't see through. Use how it's passed... I have 8 [patient report] with me at a restaurant. I would like to see how it's passed... I kind of made me think about that.
Tier 1 Code: User/Topic Tier 2 Code: Facilitation Tier 3 Code: Question, Language (The subject indicates that the language used by the survey question is not appropriate, familiar to the user.)	RESPONDENT Okay, I don't understand this one "some form of dining that is eating coffee from the way you totally eat for the sake of being weight". MODERATOR Is that question difficult? Is that answer difficult to understand? RESPONDENT That's difficult to understand, yeah.
Tier 1 Code: User/Topic Tier 2 Code: Facilitation Tier 3 Code: Experience, Dating (The subject reflects upon a personal experience related to eating habits when completing the questionnaire.)	RESPONDENT When I'm finishing on the last or starts, I consume a lot of coffee, and then I would feel satiated. So when I'm drinking a lot of coffee it stops as I have to stop eat, I have to reach my point right now.
Tier 1 Code: User/Topic Tier 2 Code: Facilitation Tier 3 Code: Technology, Experience (The subject indicates that their experience with a technology may impact their ability to "share" accomplish the goal.)	RESPONDENT I guess, I'm used to PC, more and I always look for the scroll bar on the side. MODERATOR You know, you can skip up the this. Two fingers [motions on the keyboard]. RESPONDENT Oh, okay.

Identified Issues	Notes from Interviewees
Softwareability	• I don't see how I can do this with the platform. I think I'm not generally that I have developed a habit of using it. It's something I use to help me to do things. So I don't know what you can do to do that. I don't know what you can do to do that. I don't know what you can do to do that.
Teamwork skills	• Leadership to practice - identifying cognitive ability (C)
Personal and professional development (C)	• I don't see how I can do this with the platform. I think I'm not generally that I have developed a habit of using it. It's something I use to help me to do things. So I don't know what you can do to do that. I don't know what you can do to do that.



Example of a Coded Transcript	
[11:47] respondent000001: Where would I start to look if I were looking for information on how to use a scanner?	Information-seeking
[11:48] moderator: Are you looking for current information or more historical info?	Information-active
[11:48] respondent000001: I'd like to see current information and also see what's been done in the past.	Information-seeking
[11:49] moderator: Are you familiar with the concept of a database?	Information-seeking
[11:50] respondent000001: Somewhat, I have used the sociology one.	Information-seeking
[11:50] moderator: OK. Now where the Sociology one is, under S, is a database called "Spots/Access".	Information-seeking
[11:51] respondent000001: OK. I'm thinking of the "Spots/Access" one.	Information-seeking
[11:52] moderator: You're welcome. Thanks for using the IM Reference service!	Information-seeking

From the Past into the Future. How ... qualitative-research.net

transcript quotes based on three-tier ... researchgate.net

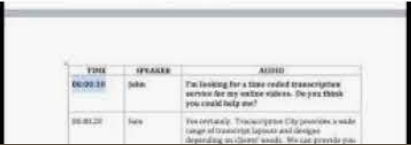
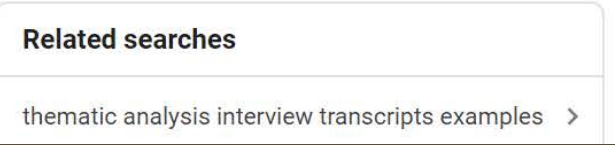
Comparative Thematic Analy... methods.sagepub.com

focus group coding using ATLAS.ti ... atlasti.com

example of coded transcript in atlas.ti ... researchgate.net



3. Manual or Electronic Coding	
Manual Coding	Electronic Coding
Tools Pencil, pencil, pen, note cards, hard copy of the transcripts or documents, artifact to be coded	Computer-Aided Qualitative Data Analysis Software (CAQDAS) such as NVivo, Atlas.ti, and Transana
Word document (using comment or "Insert Endnote" function), excel spreadsheet	



two types of coding:

pre-defined set of codes:

- **top-down**, only uses pre-defined codes
- usually too high-level to be helpful
- biased to existing framework and knowledge
- **noun-forward**
- **jumps to outcomes/insights**

concept-generated set of codes:

- can be more specific, depending on analyst
- analysts bend codes toward **uniformity**
- **noun-forward**
- **jumps to outcomes/insights; high level**

*concepts & summaries
is part of this family*

Code Types: Descriptive and Interpretive

Codes can be:

- **Descriptive:** They describe what the data is about
- **Interpretive:** They are an analytical reading of the data, adding the researcher's interpretive lens to it.

To see examples of descriptive and interpretive codes, let's look at a quote from an interview I performed with a UX practitioner earlier this year (as part of our UX Careers research, to be published in our [UX Careers report](#)).

“I was petrified about facilitating a meeting and my company offered a day-and-a-half– long course. So, I went in there and the instructor did something that I felt was horrible at the time, but I've since really come to appreciate it. The first thing that we did was we filled out a sheet of paper with our name and wrote down our worst fear of moderating or facilitating and we turned it in and then he said, okay, tomorrow you're going to act out this situation (...) the next day we came back and I would leave the room while the rest of the team read, they read my worst fear, figured out how they'd act it out, and then I'd walk in and facilitate for 10 minutes with that. And that really helped me realize that there isn't anything to be afraid of, that our fears are really in our head most of the time and facing that made me realize I can handle these situations.”

Here are possible descriptive and interpretive codes for the text above:

Descriptive code: *how skills are acquired*

Rationale behind the code label: Participants were asked to describe how they came to possess certain skills.

Interpretive code: *self-reflection*

Rationale behind the code label: The participant describes how this experience changed her beliefs about facilitation and how she reflected on her fear.

(mostly) bias-free understanding of people

concepts & summaries

identify and untangle the concepts a person mentions, then re-state (summarize) each concept in a clear way

- it is a form of coding
- truly hear the person's perspective
- keep a neutral mindset & avoid cognitive bias

in this course, what we will learn is how to comb all the concepts out of a transcript, then summarize each concept

- we carefully pick which **concepts** to summarize: inner-thinking, reaction, or guiding principle
- concepts are the person's inner landscape, **not outcomes nor insights (avoid bias)**
- the **summary** is verb-forward & spoken like the participant

why comb all the concepts out of a transcript?

so that we can separate the steps of analysis:

1. separate the list of **concepts** from the rest of the transcript
2. **understand** someone **deeply**
3. find **patterns** across different people's lists of **concepts**
4. find **insights** in the **patterns** (with much less bias)

why summarize each concept?

1. so you don't have to go back to the transcript
2. so the concept is easy to understand; you don't have to re-untangle it or re-collect it
3. so the concept is easier to compare for patterns across other people's concepts
4. so you easily understand the concept later (this data is often very long-lived; you will be re-encountering the concepts for years)

why use concepts instead of outcomes/insights?

- to have knowledge that lasts decades, which we add to once a year or two; it is **long-lived**
- this knowledge is a diagram to keep other short-term knowledge, which gets updated as solutions change
- keeping knowledge allows **intentional product strategy**
- we can use the **patterns** and **insights** to improve our **ideas & solutions**
- in support of the **patterns** that represent deep understanding of the people

before

- has done extensive research on wikis and reddit
- uses a special bag to wash his wife's satin bra
- washes his adult blankey in a special bag
- abandoned buying clothes that would fit if he lost weight after wasting \$5,000 in his 20's
- feels proud of accomplishing the laundry – a small amount of effort for such a satisfactory results

after

- Research how to best wash my wife's special satin bras by reading for tips on wikis, reddit
- Decide to buy a special washing bag sized just for a bra, because it will help clean better
- Decide to wash my favorite blanket that might fall apart in a special bag
- Realize that buying clothes smaller than I am now does not work as a motivation for me to lose weight after spending \$5000 and not changing
- Feel satisfied by accomplishing the laundry because only a little effort results in perfectly clean clothes

before

- loves doing laundry
- enjoys the feeling of productivity he gets from doing laundry
- likes the process of doing laundry more than he cares about the clothes... the clean clothes are secondary
- enthusiastic about laundry... didn't talk this way about anything else really... it's HIS thing
- the care that he takes with laundry has nothing to do with the value of the clothing

- likes the standardization of clothing: same socks, undies, things matching

- thinks the colors and sensors on his new machine are so cool

after

- Enjoy the feeling of productivity I get from doing laundry because I can see the empty laundry bins and all these nicely folded clothes

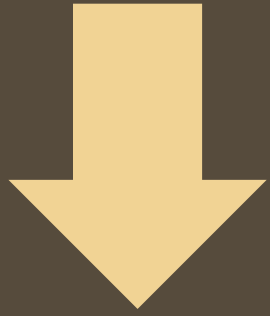
- Feel pleased to see things that are matching: same socks, undies, etc.

- Feel thrilled with the sensors, colored lights, and song that my new washing machine makes

“combing a transcript”

going through a transcript looking for concepts,
and pulling those concepts to summarize in a
separate list

this is **bottom-up analysis**

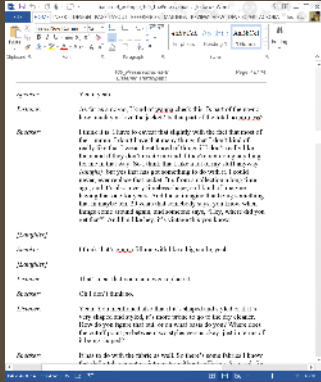


when you come at data from a top-down approach, the concepts that *you've already become interested in* get emphasized (true of much coding)

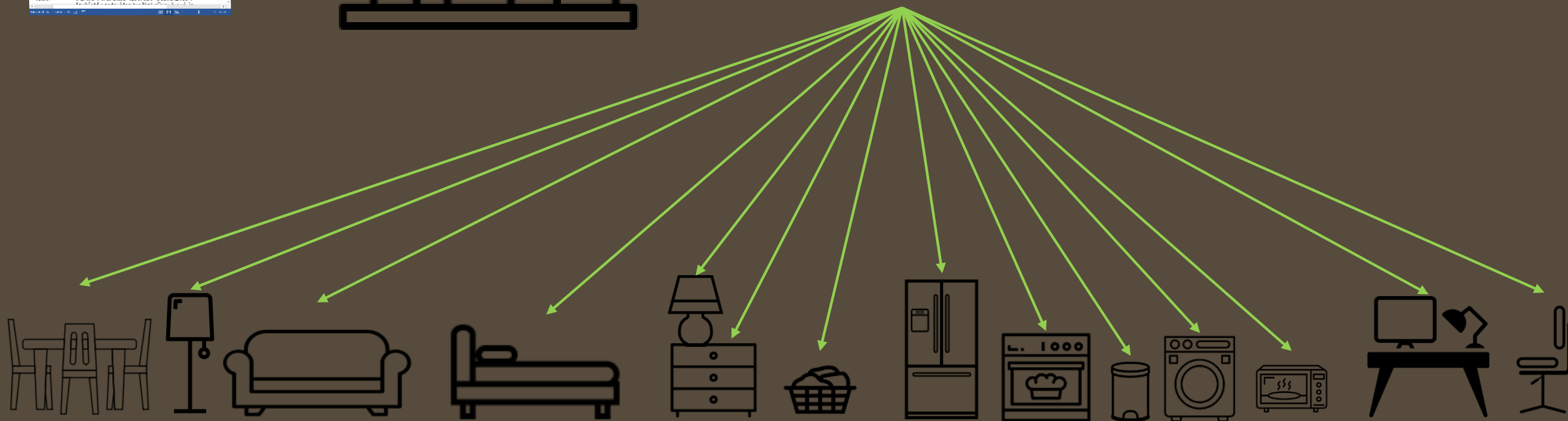
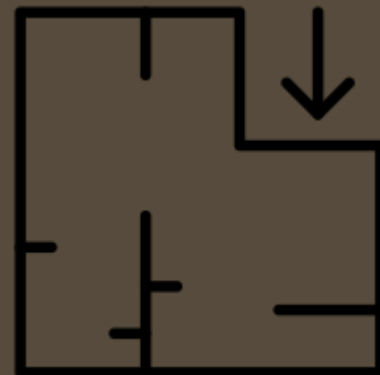
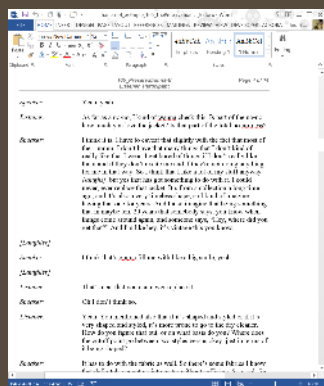
bottom-up analysis is the way to avoid cognitive bias and let the data tell you what it really means (true of combing for concepts)



a transcript is like an apartment



a transcript is like an apartment



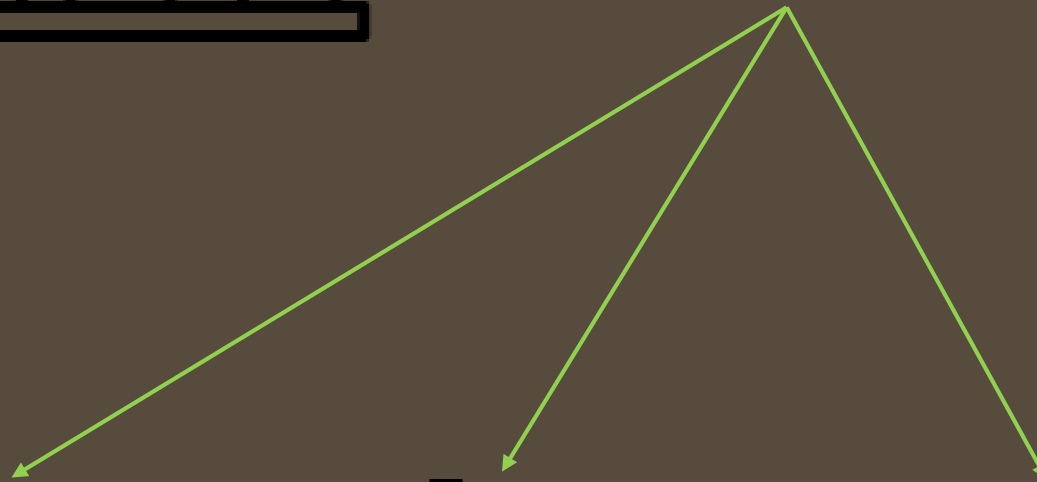
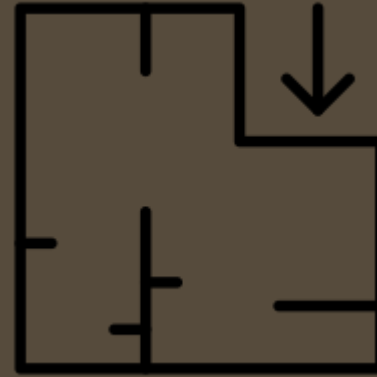
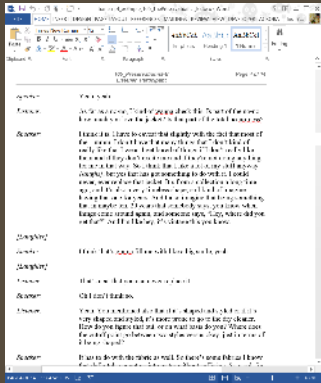
we can all recognize/agree on what's inside it



FOREST

\$39
Malawi





sofed



lamper



stovensher

identifying concepts & writing summaries,
working from the bottom-up, allows you to

- keep a neutral mindset & avoid cognitive bias
- provide solid, lasting knowledge about people

unintended consequences – outcomes you overlooked or decided not to foresee ... affecting “familiar” people

increase depth of understanding – go deeper into people’s reasoning to strengthen and possibly differentiate the ways you support them

externalities – an effect that happens to someone outside the system ... happening to people you ignored

reach more breadth of awareness – go beyond current conventions of your discipline to support additional thinking-style segments and their purposes

what is the problem space? what is a purpose?

KNOWLEDGE CREATION

source: Indi Young



MARKET RESEARCH

GENERATIVE

EVALUATIVE

KNOWLEDGE CREATION

source: Indi Young



MARKET RESEARCH

OPPORTUNITY

GENERATIVE

EVALUATIVE

KNOWLEDGE CREATION

source: Indi Young



MARKET RESEARCH



PEOPLES PURPOSE

OPPORTUNITY

GENERATIVE

EVALUATIVE

MARKET RESEARCH

PEOPLES PURPOSE

OPPORTUNITY

GENERATIVE

EVALUATIVE



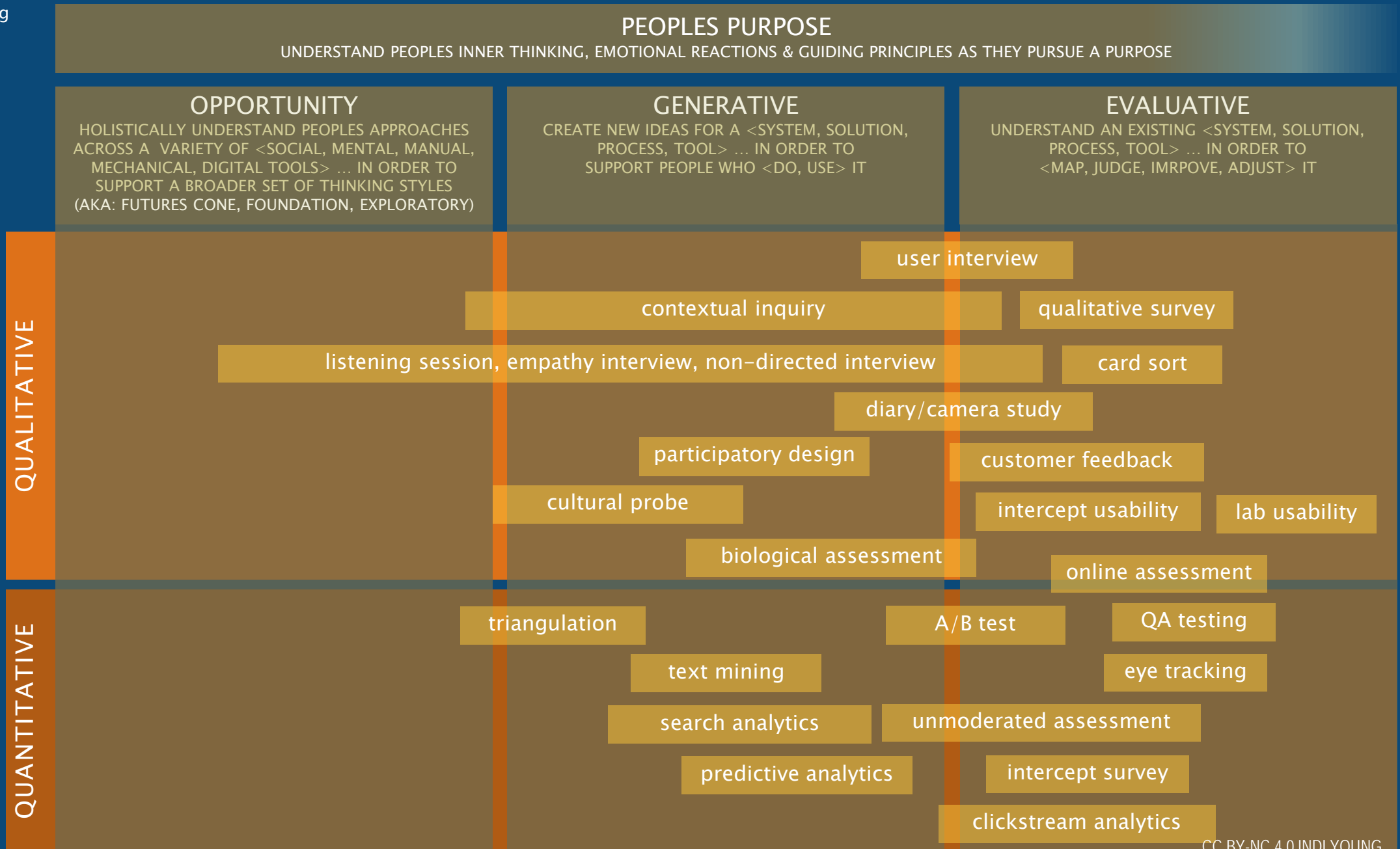
targeting



lessen frustration; lessen harm to people
reduce team's bias; give broader perspective
create differing support for differing thinking styles
increase your market without being disruptive

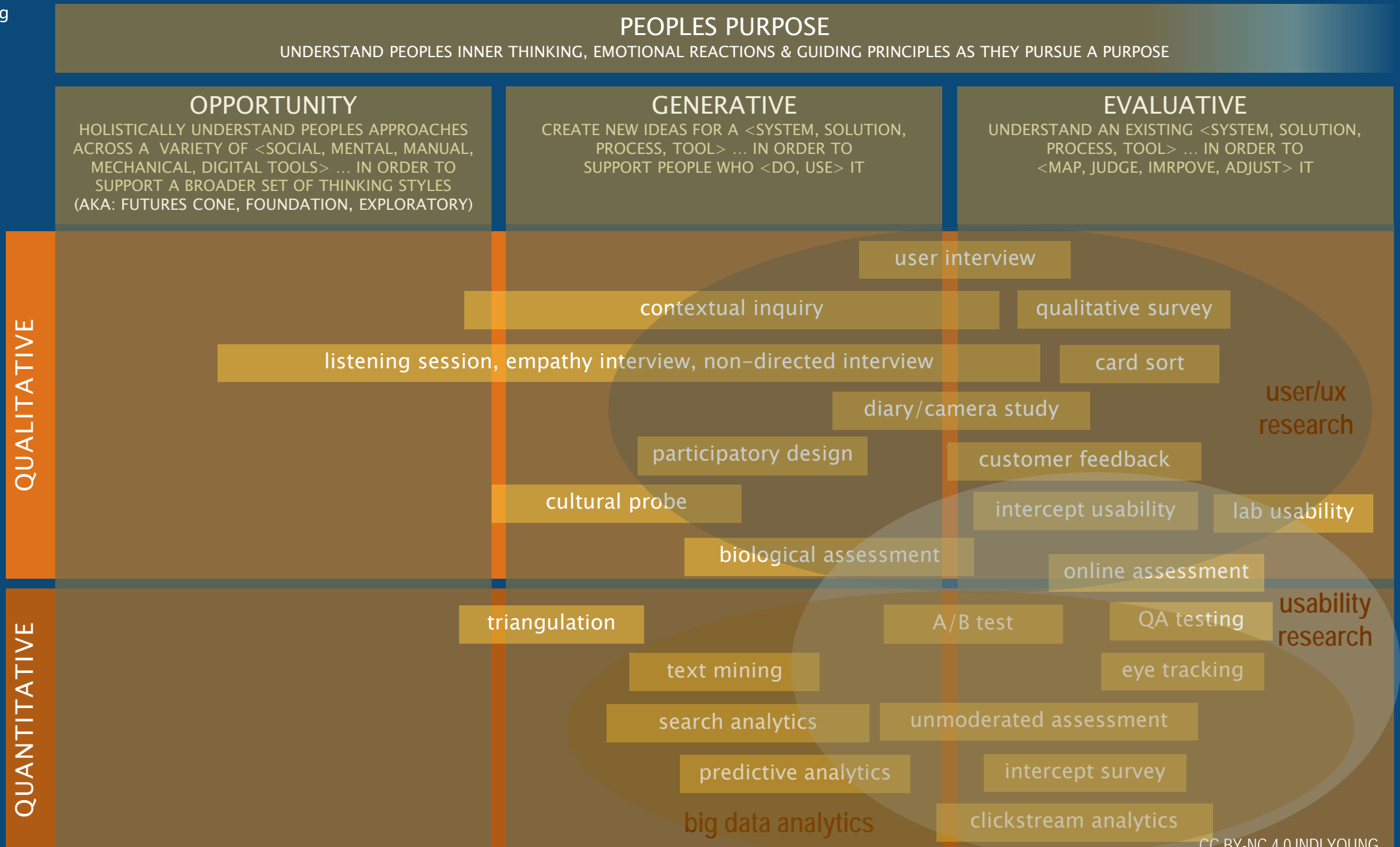
KNOWLEDGE CREATION (data collection techniques)

source: Indi Young



KNOWLEDGE CREATION (data collection techniques)

source: Indi Young

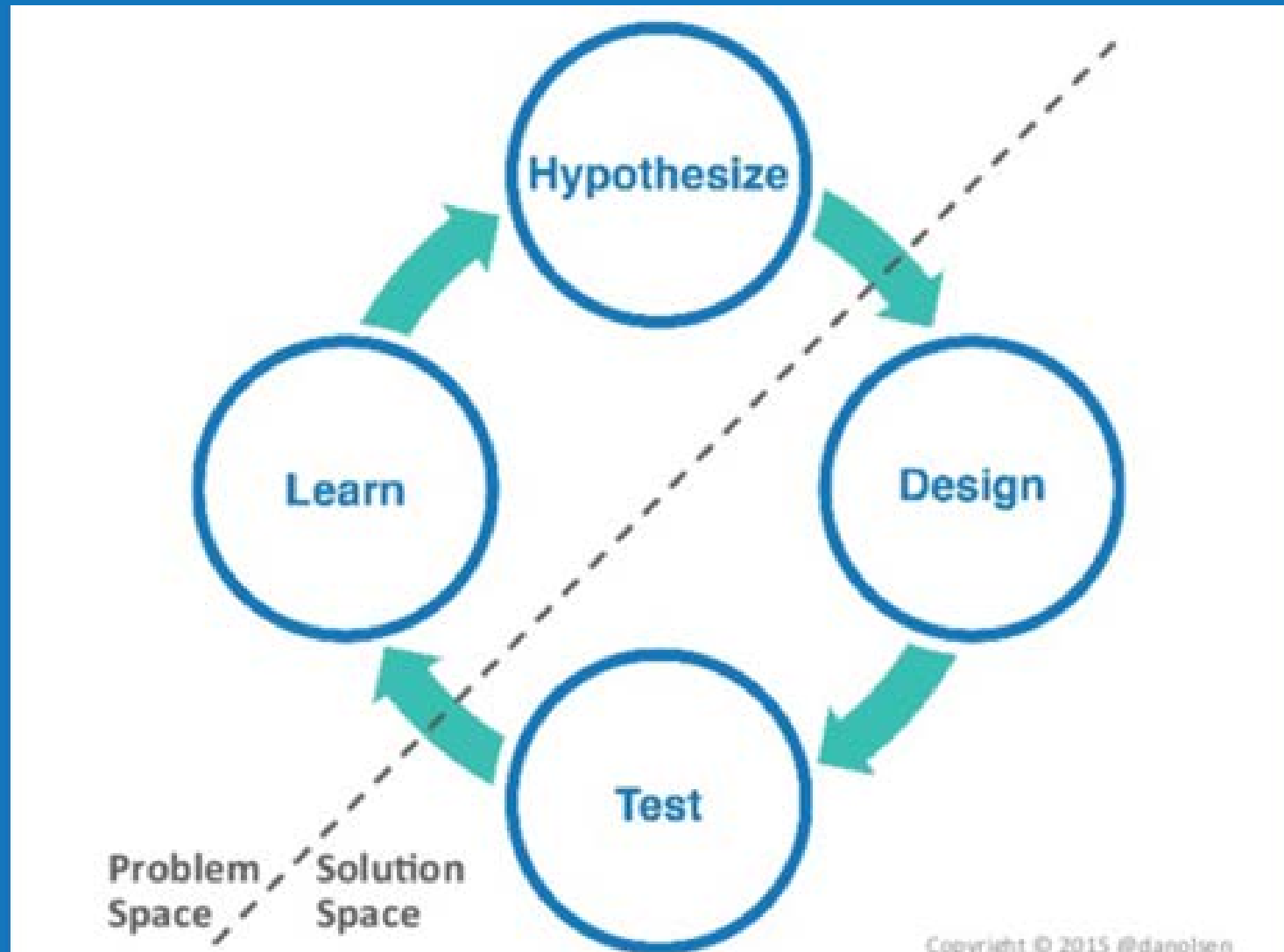


the problem space is not about
generating ideas to solve the problem

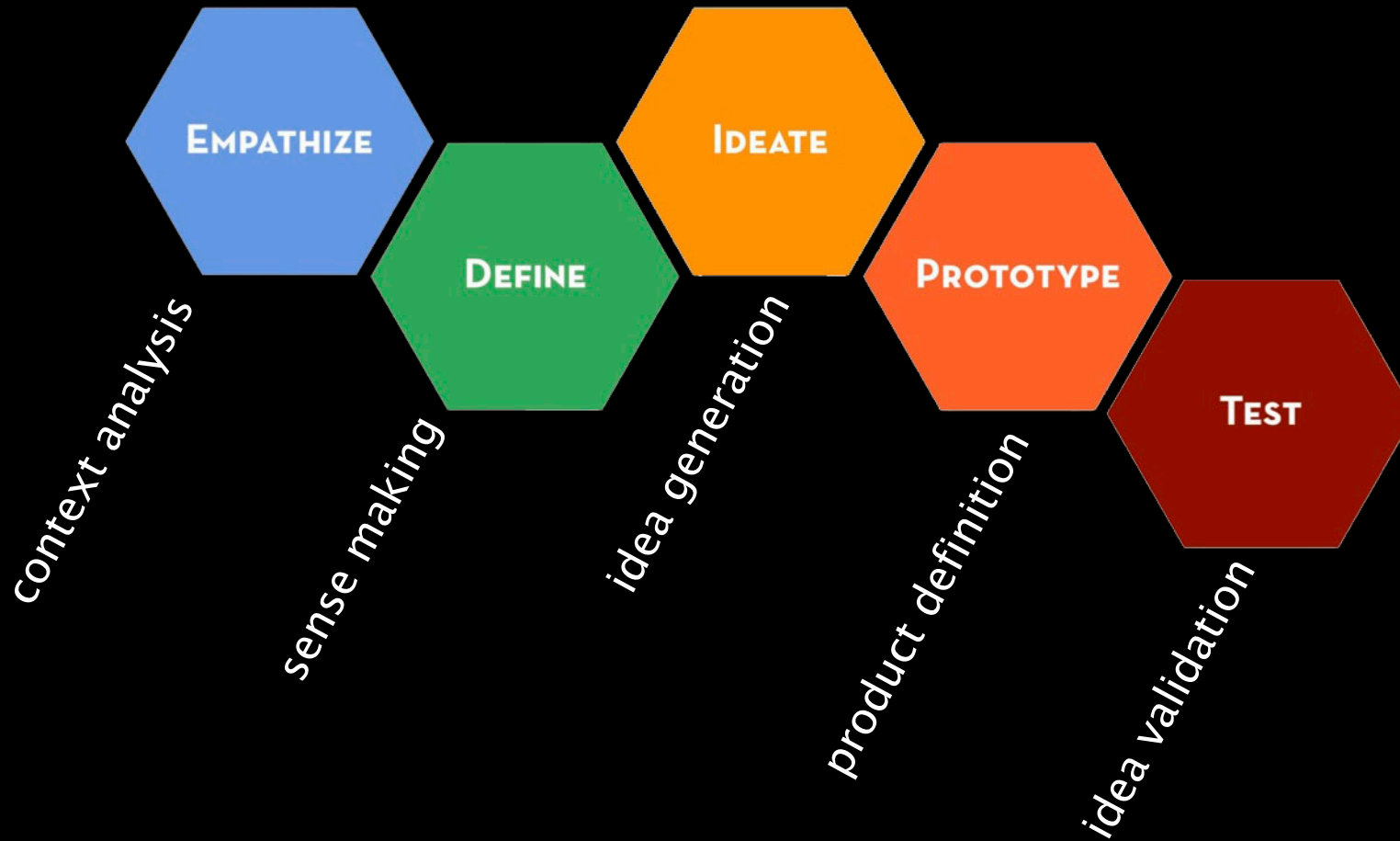
it's not about your solutions

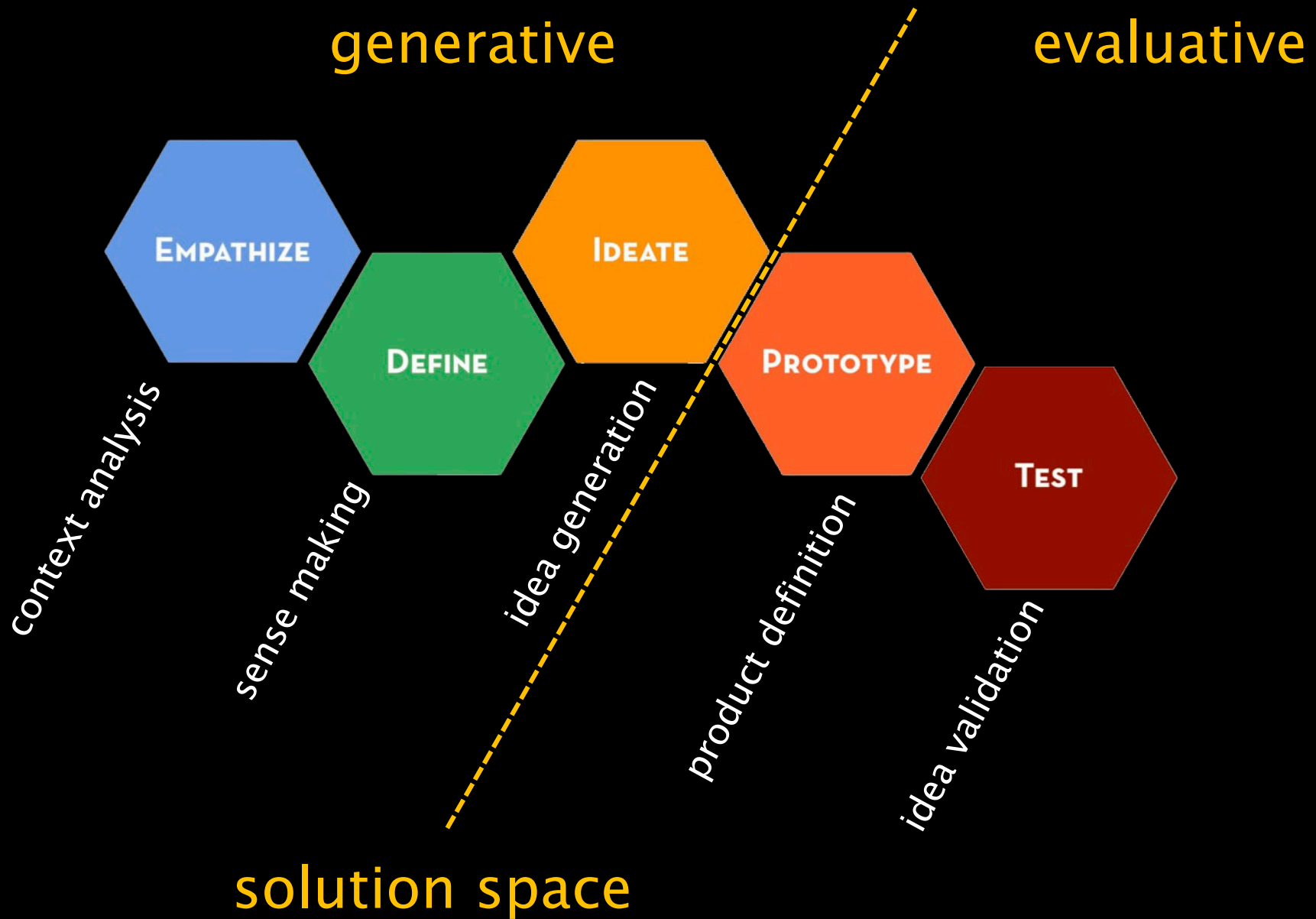
it's about understanding how different
people approach a purpose

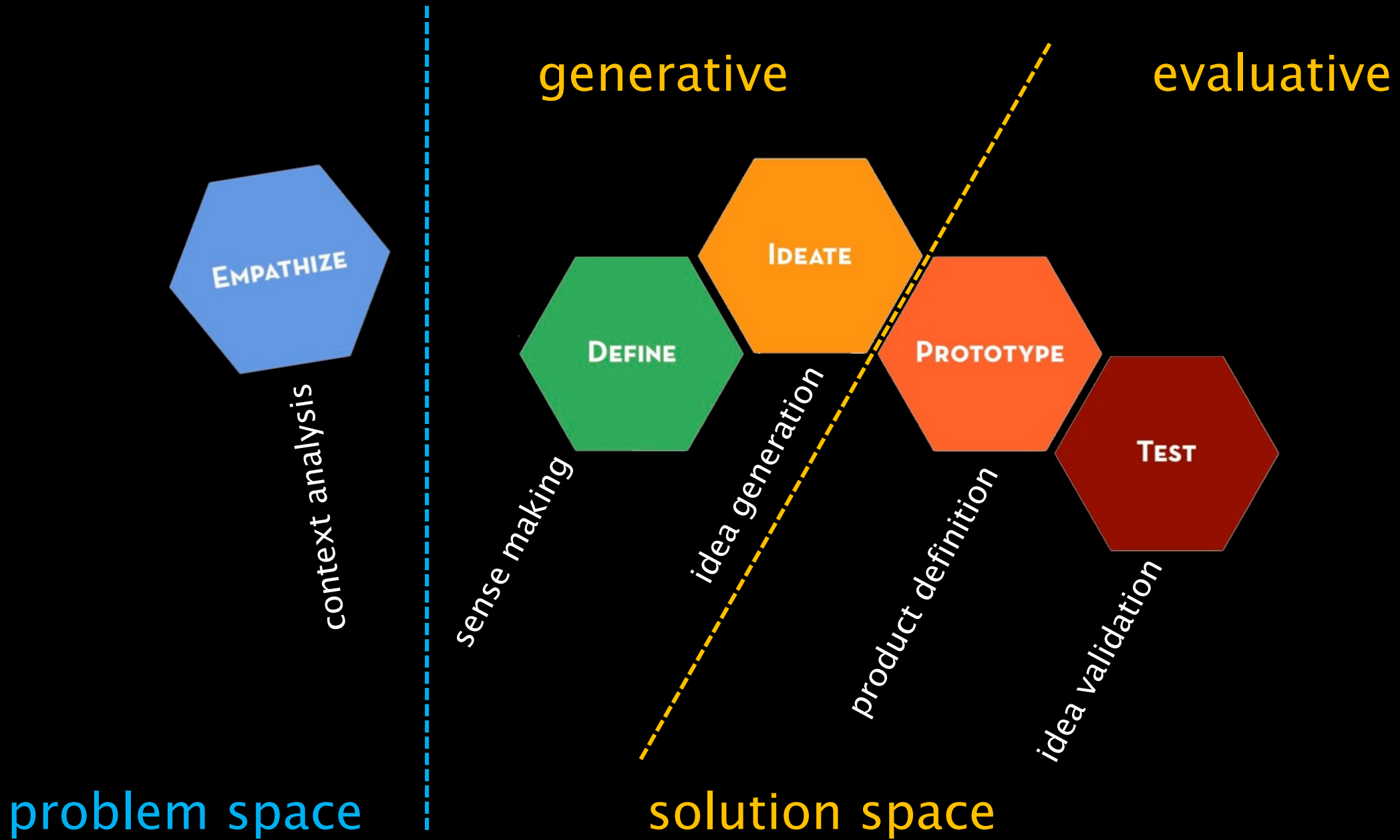
Discovery,
Definition



Design,
Delivery







problem space

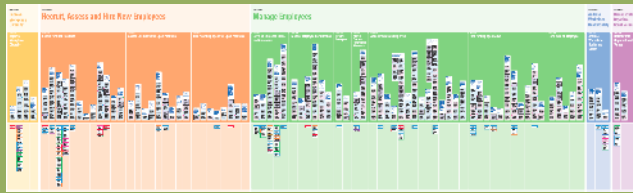
person = has their own way to achieve the purpose that you can support

strategy

transition

solution space

user = someone with a relationship/potential to your org



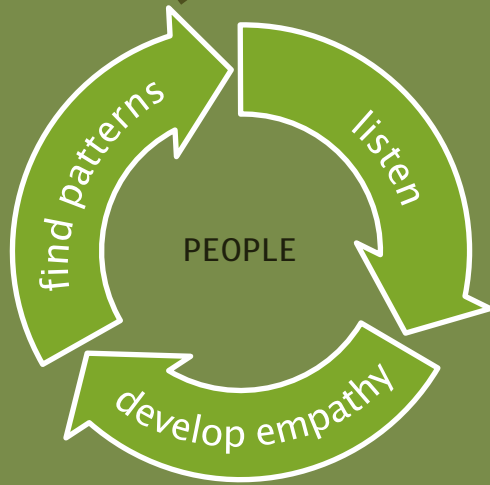
mental model diagram
(aka "opportunity map")



thinking styles



ABOUT ONCE A YEAR

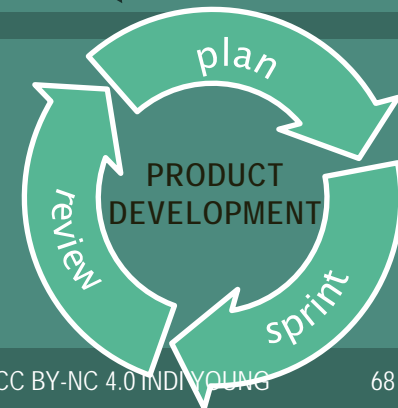
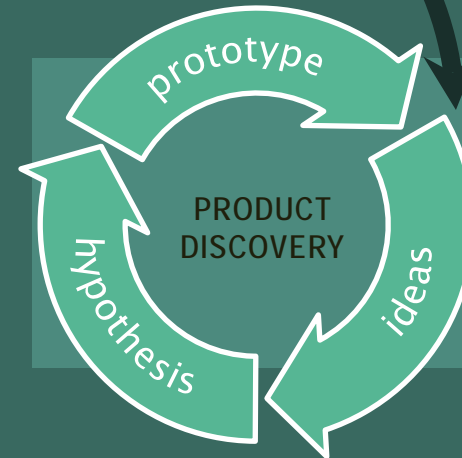


Create a single source of knowledge (and potential futures) across units.



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

CONTINUOUS DUAL TRACK



thinking styles

neighborhood

block

towers

windows

(summary of a person's inner thinking, reactions or guiding principle)

DRAFT (4/20/2012)

MENTAL MODEL: Employers and Disability in the Workplace[†]

Authors: Valerie Malzer¹ & Sarah von Schrader
Design: Corinne 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 9 interviews with Human Resource (HR) professionals (n=2), managers (n=2), and organizational directors/leaders (n=2). Participants represented federal contractors (n=2), the federal government (n=2) and private businesses (n=1) as well as small (< 500 employees, n=1), medium (501-2,499 employees, n=2) and large (> 2,500 employees, n=2) organizations. One organization was 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.
Task: 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.



[†]This work was supported in part by Department of Labor Cooperative Agreement 02-10021-0014-0-01. The opinions expressed herein do not necessarily reflect the position or policy of the U.S. Department of Labor. For a list of the names of the commercial products, or organizations imply the endorsement of the U.S. Department of Labor.

¹Corresponding author. Email: vsm2@cornell.edu

LEGEND

Mental Model

- Analysis Segments
- Operational Implementation
- Deployment Problem Solving
- Task
- People Skills (Crossed)

Demographic Characteristics

- Federal Contractor
- Federal Employee
- Small Business

Current NETAC Content & Services

Product Type and Strength

- Minimal
- Weak
- Partial/PPH
- Full/Link
- Strong
- Technical
- Marketing Material
- Minimal Support
- STRONG Support

IMPROVING STEP
Improve Workplace Diversity

MENTAL SPACE
Improve Workplace Diversity

MENTAL SPACE
Recruit for Open Positions

MENTAL SPACE
Assess Candidates for Open Positions

MENTAL SPACE
Hire New Employees for Open Positions

MENTAL SPACE
Develop Employee Skills and Awareness

MENTAL SPACE
Monitor Employee Performance

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

capabilities of org to support different thinking styles

gaps (by tower & thinking style)

purpose: a person's aim, intent, objective

what a person wants to accomplish or achieve
or plan or make progress on

what they are thinking about & planning for

→ across problem space & solution space

purposes in the
problem space

can be achieved using a
variety of solutions,
including your org's:

- manual tools
- social tools
- mental tools
- mechanical tools
- digital tools, etc.

purposes in the
solution space

are achieved using your
org's solutions

“lens of the solution”

“big box” store

problem space purposes: solution space purposes:

- it’s an emergency—something broke that I have to replace fast (refrigerator, phone ...)
- get a “feel” for a thing in person before I maybe buy it online
- I am excited about the brand–new release and want to go check it out in person

- order online and pick up in store
- find who sells this thing I want (or a related thing)
- set up a subscription to this item at this store

long-distance transit (airline, train)

problem space purposes:

solution space purposes:

- get to the gate/station on time
- remain productive (and available) on my day of travel
- get to [an event] in [far away location] and return in time to attend [another event]
- make my day of travel smooth and enjoyable (or luxurious)
- allocate my budget wisely

- search for flights on these dates
- compare the options available for the dates
- set up my seating, meal, service preferences for this carrier

use a person's purpose to frame any study

you will get richer data, at depth
patterns will arise across participants

(as long as you've recruited people who
have done a lot of thinking toward this
purpose)

sometimes you have to switch your perspective
to see from the lens of people's purpose

from "performance review" → help my direct
report (or my manager) improve

from "managing the ERP system" → keep my
client's warehouse orders flowing on time

two part analysis

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 course

works for any qualitative data depicting a person pursuing their purpose (if the transcript goes to depth: inner thinking, reactions, guiding principles)

concepts & summaries

- comb through the transcript
- select what to include
- figure out what the person means to be conveying
- summarize

What do I skip?

What were they trying to tell me?

Is something implied?

How do I clarify it?



cultivating patterns

- how do concepts fit together across transcripts?

What goes with what?

Are the focuses the same?

Is the summary unclear?

Do I have to split the summary up?

Is it relevant to the scope?

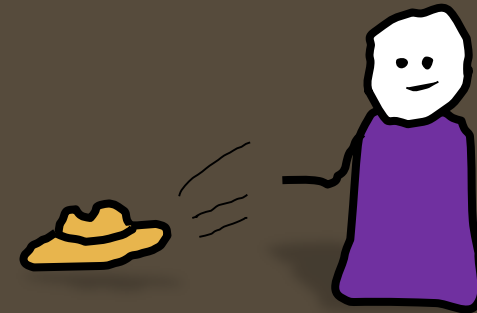
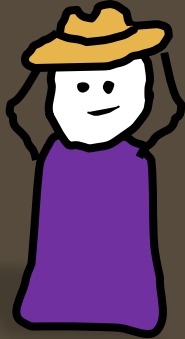
identify concepts

find patterns

concepts & summaries



cultivating patterns



so you can **develop stronger cognitive empathy** with the person

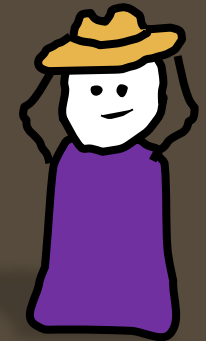
so you **won't have to re-understand concepts** later on

work **bottom up** so you can **cultivate** the patterns, **rather than curate** them (avoid **unconscious bias**, avoid **lens-of-the-solution categories**)

combing for concepts & summaries
is not analysis nor synthesis *wait, what?!*

combing & summaries is the period of time
when you must forget your role
as a researcher or an employee

it is simply figuring out and summarizing
what was said ... CliffsNotes for the transcript



surprise!

knowing the study scope (what purpose the person is trying to accomplish) is NOT necessary for combing & summaries

neutral mindset: you are not working for an org, but simply trying to understand what was said

some of the concepts may eventually form a pattern across participants that is unexpectedly in scope

knowing the purpose is imperative for the listening session

clean up the transcript (copy) to:

- correct words, catch typos
- get rid of um's, you-know's, etc.,
- fill in "inaudible" blanks
- add [tone of voice] notations where it is important to a concept
[sarcasm] [laughs] [irritated]

as I said, we need to scan these sheep as they come through. Often you'll miss scans. You'll have a sheep run off in the other direction. You're like, "Well, no, it's supposed to be **in this pin and it's not in this pin** ready to be sold. So, what do we do?"

an AI transcript is only a first pass!

you can hire a human to do the fixes, but
there will still be some things that only you
can do

summaries

concepts (quotes from the transcript)

Try to calm myself down from the anger by concentrating on my freestyle stroke

101 I tried to calm myself down by concentrating on my freestyle stroke.

Pull off the road to let myself shake because I know the fear and adrenaline will hit me after the fact

112 Being scared comes after the fact ... After the car stopped at the bottom of the hill, I moved off to the shoulder a little ways and sat there and shook. All the adrenaline came then.

Calm myself down by breathing deeply for a while in the parking lot

119 parked in the lot, and breathed deeply for a long while

Stay where I am safe for the rest of the trip, in right hand lane behind semi, because I just used my one free shot to avoid an accident

123 after I got over, I stayed in the right hand lane instead of the left. I was gripping the steering wheel, driving behind one of the semi-trucks. I was thinking, "You only get one free shot."

	41		Walk normally, even though I'm late, so if the guy decides to	106	I was about to be late, but I was almost there. So I slowed to a	Thinking
	42		Get people in the train car to look up by making a crinkling s	107	I crinkled the plastic water bottle because it's a nice, distractin	Thinking
	43	Find out if anyone was hurt				
-	44	Feel relieved I was / others were not hurt				
	45		Feel grateful I wasn't hurt, physically, because it could have l	102	I wasn't hurt; just wanted to get home at that point. ... Physica	Reaction
	46		Feel relieved that my son seems fine and is wiggling on my la	105	And it did! Half an hour later, he was starting to wiggle in my la	Reaction
	47		Feel thankful no one got hurt and there was no damage	112	I felt really thankful that no one got hurt. There were no other	Reaction
	48		Feel lucky not to have swerved because the deer that came	114	So there was a series of things. First, I actually hit a deer ... in a	Reaction
	49		Feel lucky the tire bounced entirely over my car, since it is a	114	it bounced in front of me, then clear over my car and landed in	Reaction
	50		Feel lucky I saw the stopped car in my lane early enough to h	116	someone was stopped in the first lane of the highway, and I w	Reaction
	51		Feel grateful that the tempered glass windshield saved me a	117	Boy am I glad for tempered glass. If this had happened 50 year	Reaction
	52		Feel grateful that my husband is such a good driver that he c	120	We had all five kids in the car. A black car came across the cen	Reaction
	53		Feel lucky that my husband was there to catch our daughter	121	My daughter was two, and I was carrying her in one arm, with	Reaction
	54		Feel relieved that my daughter had stopped crying because i	121	she had stopped crying, so she wasn't hurt that bad ...I looked	Reaction
-	55	<i>Worry I might have hurt someone</i>				
	56		Feel worried about the possibility the person I rear-ended is	116	I was so upset at the time, about rear-ending the car in front o	Reaction
	57		Feel scared I'm in trouble because I hurt my sister with the s	122	When she screamed, I thought, Oh no, I am in deep trouble.	Reaction
-	58	<i>Reassure people I am not hurt</i>				
	59		Reassure my brother that he didn't hurt me	104	I stepped back and said, "All right. Everything's fine."	Thinking
	60		Reassure my wife that I'm okay, not hurt by the planes	109	I also realized I need to call my wife and let her know I'm okay	Thinking
	61	Feel relieved it's over				
-	62	Spend some time getting the adrenaline out of my system				
	63		Try to calm myself down from the anger and shaking	101	I tried to calm myself down by concentrating on my freestyle s	Reaction
	64		Shake with adrenaline for a while after I stopped at the bott	112	Being scared comes after the fact ... After the car stopped at tl	Reaction
	65		Breathe deeply for a while in the parking lot to calm down	119	parked in the lot, and breathed deeply for a long while	Reaction
	66		Stay in right hand lane behind semi, gripping the wheel, for th	123	after I got over, I stayed in the right hand lane instead of the le	Thinking
-	67	Feel grateful to the person who helped me get out of the dangerous situation				
	68		Realize that my husband's absorption in driving is what saved	120	He replied, "I'm thinking about driving." So when the black car	Thinking
	69		Feel grateful the semi-truck driver is paying attention and slc	123	I heard a honk, and I looked up. There was a semi-truck, and h	Reaction
	70		Praise the woman's rescue directions, since she sounded cor	124	She was happy to have a chance to practice in a real situation.	Thinking


these are grouped patterns of summaries, which is Part 2

as you add more voices (about this purpose), the patterns stabilize

41	Walk normally, even though I'm late, so if the guy dec	106	I was about to be late, but I was almost there. So I slow	Thinking
42	Get people in the train car to look up by making a crin	107	I crinkled the plastic water bottle because it's a nice, dis	Thinking
43	Find out if anyone was hurt			
44	Feel relieved I was / others were not hurt			
45	Feel grateful I wasn't hurt, physically, because it could	102	I wasn't hurt, just wanted to get home at that point. ... Ph	Reaction
46	Feel relieved that my son seems fine and is giggling o	105	And it did! Half an hour later, he was starting to wiggle in	Reaction
47	Feel thankful no one got hurt and there was no damag	112	I felt really thankful that no one got hurt. There were no c	Reaction
48	Feel lucky not to have swerved because the deer that	114	So there was a series of things. First, I actually hit a deer	Reaction
49	Feel lucky the tire bounced entirely over my car, since	114	it bounced in front of me, then clear over my car and lan	Reaction
50	Feel lucky I saw the stopped car in my lane early enou	116	someone was stopped in the first lane of the highway, a	Reaction
51	Feel grateful that the tempered glass windshield save	117	Boy am I glad for tempered glass. If this had happened E	Reaction
52	Feel grateful that my husband is such a good driver th	120	We had all five kids in the car. A black car came across	Reaction
53	Feel lucky that my husband was there to catch our da	121	My daughter was two, and I was carrying her in one arm,	Reaction
54	Feel relieved that my daughter had stopped crying bec	121	she had stopped crying, so she wasn't hurt that bad ...!k	Reaction
55	<i>Worry I might have hurt someone</i>			
56	Feel worried about the possibility the person I rear-en	116	I was so upset at the time, about rear-ending the car in fi	Reaction
57	Feel scared I'm in trouble because I hurt my sister with	122	When she screamed, I thought, Oh no, I am in deep trou	Reaction
58	<i>Reassure people I am not hurt</i>			
59	Reassure my brother that he didn't hurt me	104	I stepped back and said, "All right. Everything's fine."	Thinking
60	Reassure my wife that I'm okay, not hurt by the planes	109	I also realized I need to call my wife and let her know I'm	Thinking
61	Feel relieved it's over			
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63	Try to calm myself down from the anger and shaking	101	I tried to calm myself down by concentrating on my free:	Reaction
64	Shake with adrenaline for a while after I stopped at the	112	Being scared comes after the fact ... After the car stopp	Reaction
65	Breathe deeply for a while in the parking lot to calm d	119	parked in the lot, and breathed deeply for a long while	Reaction
66	Stay in right hand lane behind semi, gripping the wheel,	123	after I got over, I stayed in the right hand lane instead of	Thinking
67	Feel grateful to the person who helped me get out of the dangerous situation			
68	Realize that my husband's absorption in driving is wh	120	He replied, "I'm thinking about driving." So when the bla	Thinking
69	Feel grateful the semi-truck driver is paying attention	123	I heard a honk, and I looked up. There was a semi-truck,	Reaction
70	Praise the woman's rescue directions, since she sou	124	She was happy to have a chance to practice in a real siti	Thinking
71	<i>Feel relieved the danger is over</i>			
72	Feel thankful to reach the street I recognized from the	106	thankfully I came to the street I needed. I felt relieved to	Reaction
73	Feel safer because the guy won't try to steal my bag o	106	The sidewalks were wider, and it was less crowded, so th	Reaction
74	Feel relieved I didn't have to figure out how to get his	116	I was also concerned about getting him off the shoulder	Reaction
75	<i>Feel surprised I reacted this way</i>			
76	Feel surprised I'm not taking his rage personally perha	102	Oddly, I'm not taking it personally. Though my person w	Reaction
77	Feel amazed how much the shock and daze slowed di	109	even later in the afternoon, I contacted my parents, who	Reaction
78	Realize my message to my wife was not clear, becaus	109	my communication was not clear. I realized this later. W	Thinking
79	Feel angry at the other person involved			
80	Feel angry at the person who could have avoided causing this			
81	Feel angry that the big guy with the plastic hand padd	101	Why did he just jump in and endanger me without asking	Reaction
82	Feel annoyed the driver forced me out of the crosswa	102	a driver pulls into the crosswalk, even though I had the v	Reaction
83	Feel angry while thinking of all sorts of things to say t	117	My mind kept thinking of things I should tell him. Like, "F	Thinking
84	Feel upset that their neglect has put me out in a big w	117	"You've put me out in a big way!" ... I was thinking, "Can	Reaction
85	Feel annoyed at my team for putting me in the positio	119	annoyance at my team whose performance out in me in	Reaction
86	Feel angry at the guys for accusing me when they cou	123	After he was safe, the guys asked me why I didn't jump ii	Reaction
87	<i>Confront the other person (or not) so he knows he put me out</i>			
88	Make the life guards feel remorse for not paying atten	101	"Hey, guards!" I yelled at them. "This fellow just nearly c	Reaction
89	Struggle to decide whether I should remain my non-oc	117	Should I run up there and tell him what just happened? O	Thinking
90	Try to enlist the help of an official looking car to flag c	117	There was some sort of a service car, or some sort of	Thinking
91	Realize that my crazy impulse to get the driver of the c	117	they just looked confused. ... That impulse didn't last ve	Thinking
92	Decide to drive home because there was nothing I co	117	Finally I drove home ... I decided I guess there's nothing	Thinking
93	Hope I can yell at them because I need to direct my ag	117	I wanted to get on the phone and yell at them. "There we	Reaction
94	Confront the person so he won't do it again to anyone else			
95	Decide it is my public service to go up there and tell th	117	It's a guy working on a house up there ... He's going to b	Guiding Principle
96	Remind awful drivers that we pedestrians exist so the	102	drivers are often awful at respecting pedestrians' safety	Thinking
97	Make sure someone knows the rules, if he acts in a s	101	He needed to learn better lane etiquette, or he could hur	Guiding Principle
98	Feel angry that he is so offhanded about making assu	101	He replied offhandedly, "I thought you saw me," and pus	Reaction
99	Try to defuse the tension between me and the other person involved			
100	Try to try to downplay the fact that I got angry	101	I touched him on his right shoulder. He stopped. I look	Thinking
101	Show the guards I could see their point of view, as a s	101	talk to the guards and tell them I could see how they hac	Thinking
102	Keep the situation from escalating by using a calm to	102	I'm surprised and relieved that my instincts served me a	Thinking
103	Avoid adding tension to the situation by not accusin	124	I didn't accuse him of being over the line. ... I thought it w	Thinking
104	Wonder what the other person involved was thinking			
105	Attempt to see things from his point of view, as some	101	While I swam, I noticed the other guy seems to have cer	Thinking
106	Wonder what drives the kind of anger that causes a pe	102	While lying in bed sleepless much of the night, I kept thin	Thinking
107	Realize based on her story, the guard was paying atten	101	I thought about it for a second and realized the guard wc	Thinking
108	Assume the guy who jumped in the deep end could sw	123	I went over my thinking. Usually adults don't jump in the	Thinking
109	<i>Feel upset that the person who did this probably wasn't paying attention, doesn't care</i>			
110	Feel astounded the life guards were chatting, not payi	101	They were not paying attention and let this fellow endan	Reaction
111	Feel frustrated that the driver and occupants of the w	117	I look over and it's four men, and three of them are asle	Reaction
112	Imagine the young guy was not paying attention beca	117	He just wasn't paying attention ... He's a young guy ... He	Thinking
113	Feel angry replaying the scenario from his eyes and se	101	how could he endanger me with such a stupid assumpti	Reaction
114	Doubt the guy cares about what others think about hi	101	I felt doubts that the big guy would actually listen to then	Reaction
115	Feel upset again replaying the scenario and words in r	101	I replayed the scenario and the words over in my head. E	Reaction
116	Feel upset with myself			

recognize a concept

emic perspective – follow what the participant brings up as important (not on your own goals)

A person is hiking on a dirt trail. The person is wearing dark shorts, blue socks, and grey sneakers. They are holding a small object in their right hand. The trail is surrounded by green grass and some rocks. The text is overlaid on the image in white font.

follow wherever they go, even if it doesn't
seem associated to the topic you asked about
... because that is associated 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/acting

purpose: decide whether to attend
a performance

inner thinking

“I justify spending \$30 for a not-cheap movie night because our financial advisor reassured us we are doing alright and we can afford to spend extra money.”

emotional reaction

“I feel irritated that here, predictably, is the car chase scene in this Marvel Comic movie, because they all follow the same format ending with superheroes duking it out.”

guiding principle

“I value doing outdoor activities when it is summer and the sun is out because, unless it is a special performance, I will opt to spend time outside.”

let's try it! – surface or depth?

“I actually took Delta from Toronto back to Saint Louis, and it wasn't quite as pleasant as American Airlines. I just had a very annoying lady. ... She just, for some reason, she just felt the need to keep on telling me about her personal business.”

“I wasn't raised to be disrespectful to my elders, so I let her talk but I kind of like ... I wouldn't say nothing so she would get the hint that I'm not interested.”

“The waiting to board the plane, besides me getting lost twice, was very simple. After I actually got there, I sat down for a while because I was early ... even though I managed to get lost twice. But the waiting to board, once I got to the right gate, she told me I was 15 minutes early.”

“I sat down for like 10 or 15 minutes to gather myself, because I was running around the airport. So, I got my thoughts together and calmed down a little bit, and that was just, that was fine.”

“On the way back – we were there for a week – on the way back, we got hit big. We got hit with a bad snowstorm, like the night before. ... they kind of know what to do with the snow, and so – but they weren’t letting you through the pass unless you had a four-wheel drive, and it was kind of creeping along, creeping along.”

“I got to the airport two and a half hours before hand because of the international booking. You know how you have to, basically, for the international ... because there was luggage.”

look for **surface vs. depth**, not concept meaning

don't derive insights as you listen

forging **meaning** as you scan will bias you and
introduce assumptions

more definitions of depth

inner thinking
emotional reaction specific to one event or time
guiding principle ongoing & (mostly) constant

inner thinking
emotional reaction specific to one event or time

guiding principle ongoing & (mostly) constant

what about an **opinion??**

a **guiding principle** is **not** an **opinion**

an **opinion** is a judgement/appraisal of something
... or a belief or guess about something

a **guiding principle** is **not** a **preference**

a **preference** is wanting or liking one thing more than another, comparatively

a **guiding principle** is **not** a **generalization**

a **generalization** is applying specific inner thinking
or reaction to every instance of a context

a **guiding principle** is a foundational instruction
for making decisions

is a description of how I make
decisions/act/react in this kind
of case

a **guiding principle** is **not** the same as a value

(though it might have a value way down at its root)

example **values** from a list of 100:

belonging

comfort

fitness

God's will

humor

imagination

industry

moderation

non-conformity

openness

patriotism

popularity

power

rationality

responsibility

safety

self-control

spirituality

tolerance

wealth

world peace

(or it could have superstition at its root, etc.)

surface vs depth is the important part

which type of surface or depth is less important

if it's depth, and you label it as inner thinking
but it's really a guiding principle, it doesn't
matter ... the concept will get put into a pattern
with similar concepts no matter what its type

example

purpose: what went through your mind during a near-miss accident?

Speaker: So near our house, the main street takes a left turn, but there's a little street that continues straight, which goes up this hill where there are more houses. There's a crosswalk there. I was walking the dog. I was just about to use the crosswalk, and this pickup whizzed by and blasted up the hill, going about 30-35 miles per hour. Suddenly there was a lot of adrenaline in my system. It's a guy working on a house up there. What if he didn't see me?! He could have run over me, or run over my dog! Should I run up there and tell him what just happened? Or should I just keep walking and try to ignore it? I walked two or three more steps, turned, and went up there to tell him what he did. And this is so not like my normal, non-confrontational self. "Is this your truck?" I asked. "Yeah," he said. "You should be more careful. You almost just ran me over!" He did say he was sorry. My mind kept thinking of things I should tell him. Like, "How would you like to take a dead dog to your kids and tell them what happened?" You think of all sorts of things you could say, because of the adrenaline. He just wasn't paying attention. I remember this one quite clearly because there was real internal tension deciding whether I should go up there and tell him, or just keep going and ignore it. If I had turned into the crosswalk immediately instead of going to the actual corner, or been 5 steps ahead of myself, he would have hit me! He's going to be working up there another 5 months. I should go up there and say something. He's a young guy, 25. They don't know better. He was probably listening to music or something. It was my public service.

Listener: Now I have goose bumps. I mean, that was close!

Speaker: Yeah. I did hesitate just a second, wondering what kind of a guy was I going to run into. You never know. There are people dying from altercations on the sidewalk. Someone hits their head on the concrete, and they're done for. It doesn't take much.

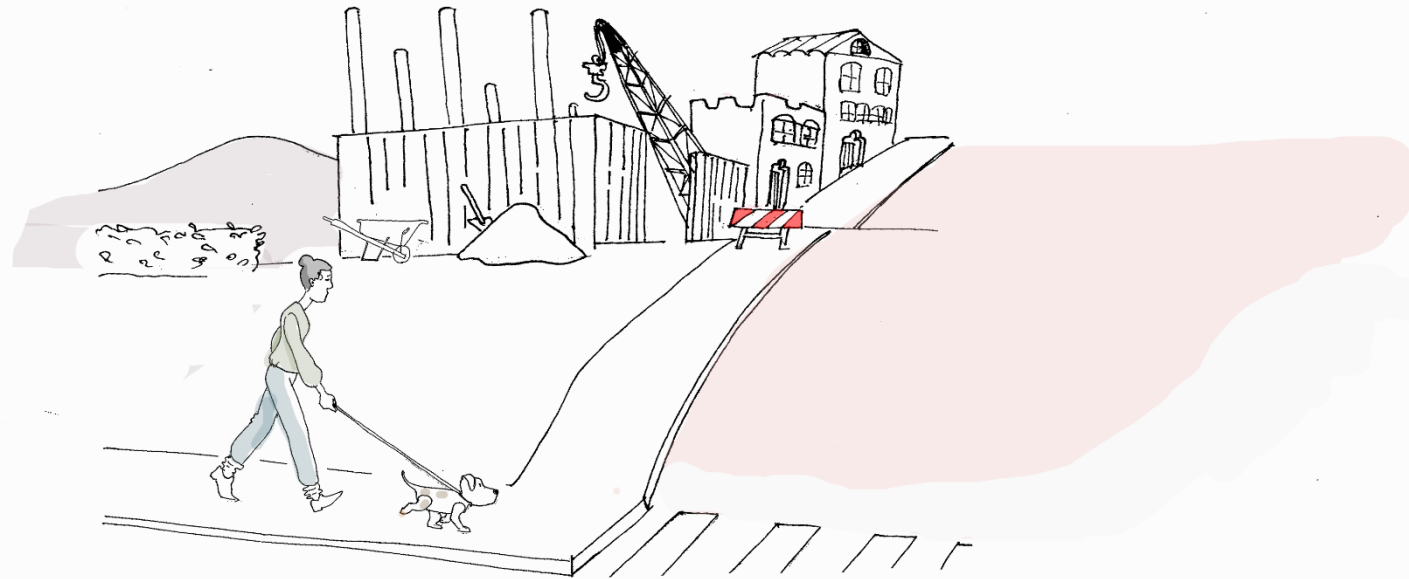
Listener: Totally! It's scary how some people react.

Speaker: He came that close! He should know what kind of horrible thing could have happened. We're teaching my daughter to drive now, and it's so important to pay attention, not get distracted, when you're driving. They're doing a good job with the PSA's—the Public Service Announcements—about not texting or reading texts when you're driving. They're showing clips of the family of the victim. It's called "It Can Wait." I saw these clips on the website for a phone app, but also on AT&T and other websites. They're shot like PSA's, little 30 second clips. You hear their stories and you're pretty much in tears by the end of the first one. They have managed to get some drivers who have killed someone on camera. They say, "The guilt lasts forever."

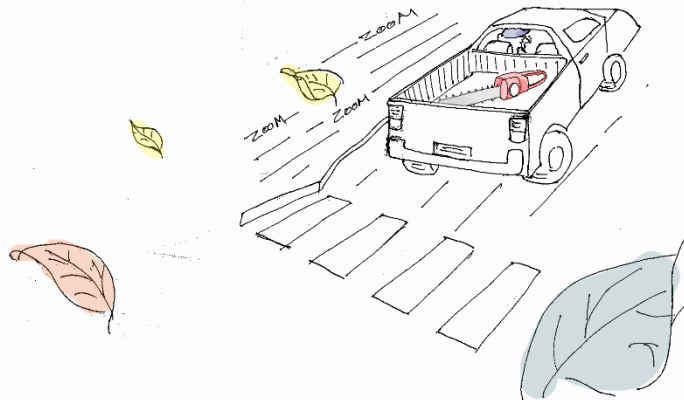
Listener: Seriously. I'll have to check out those clips, although it will be hard to watch them.

a comic to help you visualize the difference between concepts and the surface-level elements:

- concepts = thought-bubbles
- surface-level = background drawings (context)



I was walking the dog in my neighborhood, where there is a construction site.



Feel alarmed by the pickup that whizzed by me at 35 mph when I was at the crosswalk.

let's start finding concepts

(here each concept is a different color,
but I don't do colors in real work
because you run out of colors quickly)

Speaker: So near our house, the main street takes a left turn, but there's a little street that continues straight, which goes up this hill where there are more houses. There's a crosswalk there. I was walking the dog. I was just about to use the crosswalk, and this pickup whizzed by and blasted up the hill, going about 30-35 miles per hour. **Suddenly there was a lot of adrenaline in my system.** It's a guy working on a house up there. What if he didn't see me?! He could have run over me, or run over my dog! Should I run up there and tell him what just happened? Or should I just keep walking and try to ignore it? I walked two or three more steps, turned, and went up there to tell him what

the first four sentences are scene-setting ...
then there's a *reaction* where the concept is
feeling the adrenaline or alarm

think of all sorts of things you could say, because of the adrenaline. He just wasn't paying attention. I remember this one quite clearly because there was real internal tension deciding whether I should go up there and tell him, or just keep going and ignore it. If I had turned into the crosswalk immediately instead of going to the actual corner, or been 5 steps ahead of myself, he would have hit me! He's going to be working up there another 5 months. I should go up there and say something. He's a young guy, 25. They don't know better. He was probably listening to music or something. It was my public service.

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next you see a statement of fact setting the context, then *inner thinking* ... these are thoughts racing through this person's mind immediately after the feeling of alarm

tension deciding whether I should go up there and tell him, or just keep going and ignore it. If I had turned into the crosswalk immediately instead of going to the actual corner, or been 5 steps ahead of myself, he would have hit me! He's going to be working up there another 5 months. I should go up there and say something. He's a young guy, 25. They don't know better. He was probably listening to music or something. It was my public service.

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a different concept appears next: *inner thinking* where the concept is wondering whether or not to go talk to the guy about the near-miss

...when deciding whether I should go up there and tell him, or just keep going and ignore it. If I had turned into the crosswalk immediately instead of going to the actual corner, or been 5 steps ahead of myself, he would have hit me! He's going to be working up there another 5 months. I should go up there and say something. He's a young guy, 25. They don't know better. He was probably listening to music or something. It was my public service.

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another concept appears: *inner thinking* about deciding to go ahead and confront the guy (this concept is implied; more about this in class #3)

ignore it. If I had turned into the crosswalk immediately instead of going to the actual corner, or been 5 steps ahead of myself, he would have hit me! He's going to be working up there another 5 months. I should go up there and say something. He's a young guy, 25. They don't know better. He was probably listening to music or something. It was my public service.

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and now the speaker returns to the concept of wondering whether or not to go talk to the guy about the near-miss; this goes together with the earlier sentences (this is a tangled concept; more on that in class #3)

something. It was my public service.

Speaker: So near our house, the main street takes a left turn, but there's a little street that continues straight, which goes up this hill where there are more houses. There's a crosswalk there. I was walking the dog. I was just about to use the crosswalk, and this pickup whizzed by and blasted up the hill, going about 30-35 miles per hour. **Suddenly there was a lot of adrenaline in my system.** It's a guy working on a house up there. **What if he didn't see me?! He could have run over me, or run over my dog! Should I run up there and tell him what just happened? Or should I just keep walking and try to ignore it? I walked two or three more steps, turned, and went up there to tell him what he did.** And this is so not like my normal, non-confrontational self. "Is this your truck?" I asked. "Yeah," he said. "You should be more careful. You almost just ran me over!" He did say he was sorry. My mind kept thinking of things I should tell him. Like, "How would you like to take a dead dog to your kids and tell them what happened?" You think of all sorts of things you could say, because of the adrenaline. He just wasn't paying attention. I remember this one quite clearly because there was real internal tension deciding whether I should go up there and tell him, or just keep going and

here's *inner thinking* about how to make the driver realize what could have happened ... (possibly the concept is about making the driver realize how much he has scared this speaker)

and here is even more inner thinking about whether or not to go talk to the guy, even though it's couched as explanation (this is a repeated concept which goes together with the two earlier mentions in the gold color; more on this in our class #2)

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this
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next the speaker refers back to their earlier thinking about what a close call it was (this is a repeated concept; more on this in class #2)

...tension deciding whether I should go up there and tell him, or just keep going and ignore it. **If I had turned into the crosswalk immediately instead of going to the actual corner, or been 5 steps ahead of myself, he would have hit me!** He's going to be working up there another 5 months. I should go up there and say something. He's a young guy, 25. They don't know better. He was probably listening to music or something. It was my public service.

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He
additionally, there are two more mentions of the *inner thinking* about making the decision to go confront the truck driver (this is a repeated & implied concept; more on this classes #2 & #3)

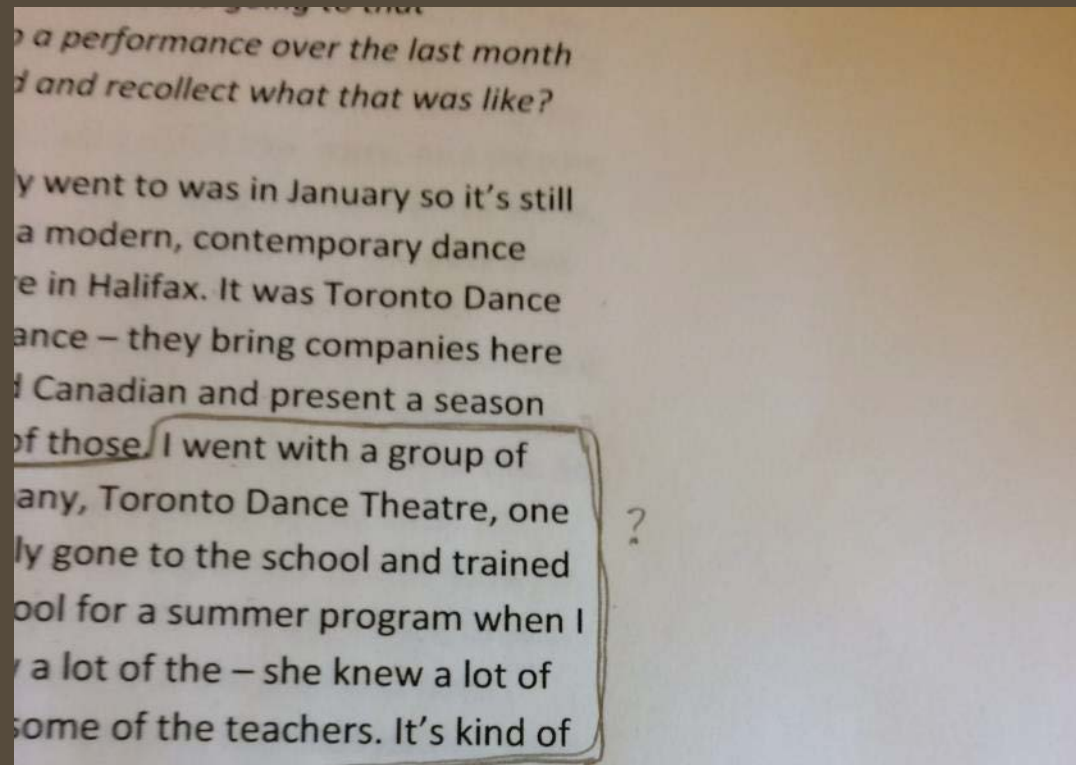
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Quote	Type
<p><i>I was just about to use the crosswalk, and this pickup whizzed by and blasted up the hill, going about 30–35 miles per hour. Suddenly there was a lot of adrenaline in my system.</i></p>	<p>emotional reaction</p>
<p>What if he didn't see me?! He could have run over me, or run over my dog! ... If I had turned into the crosswalk immediately instead of going to the actual corner, or been 5 steps ahead of myself, he would have hit me!</p>	<p>inner thinking</p>
<p>Should I run up there and tell him what just happened? Or should I just keep walking and try to ignore it? ... And this is so not like my normal, non-confrontational self. ... I remember this one quite clearly because there was real internal tension deciding whether I should go up there and tell him, or just keep going and ignore it.</p>	<p>inner thinking</p>
<p><i>It's a guy working on a house up there</i> ... I walked two or three more steps, turned, and went up there to tell him what he did. ... He's going to be working up there another 5 months. I should go up there and say something. ... It was my public service.</p>	<p>inner thinking</p>
<p>"You should be more careful. You almost just ran me over!" ... My mind kept thinking of things I should tell him. Like, "How would you like to take a dead dog to your kids and tell them what happened?" You think of all sorts of things you could say</p>	<p>inner thinking</p>

marking up transcripts

any way you want to, digitally or
physically, or not at all

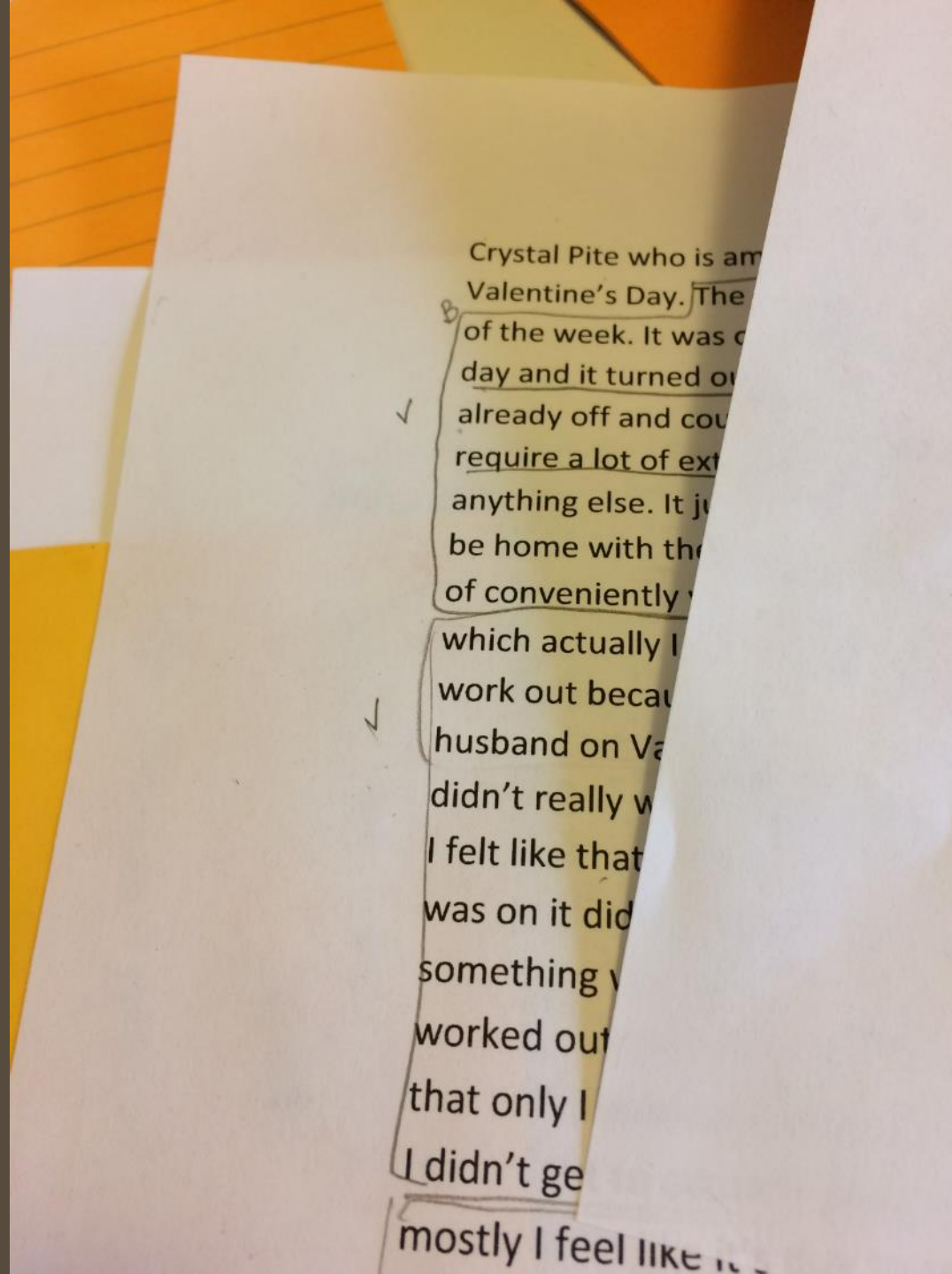
“I print the transcript with wide margins to make it easier to mark up. I also find it easier to read with fewer words per line.”



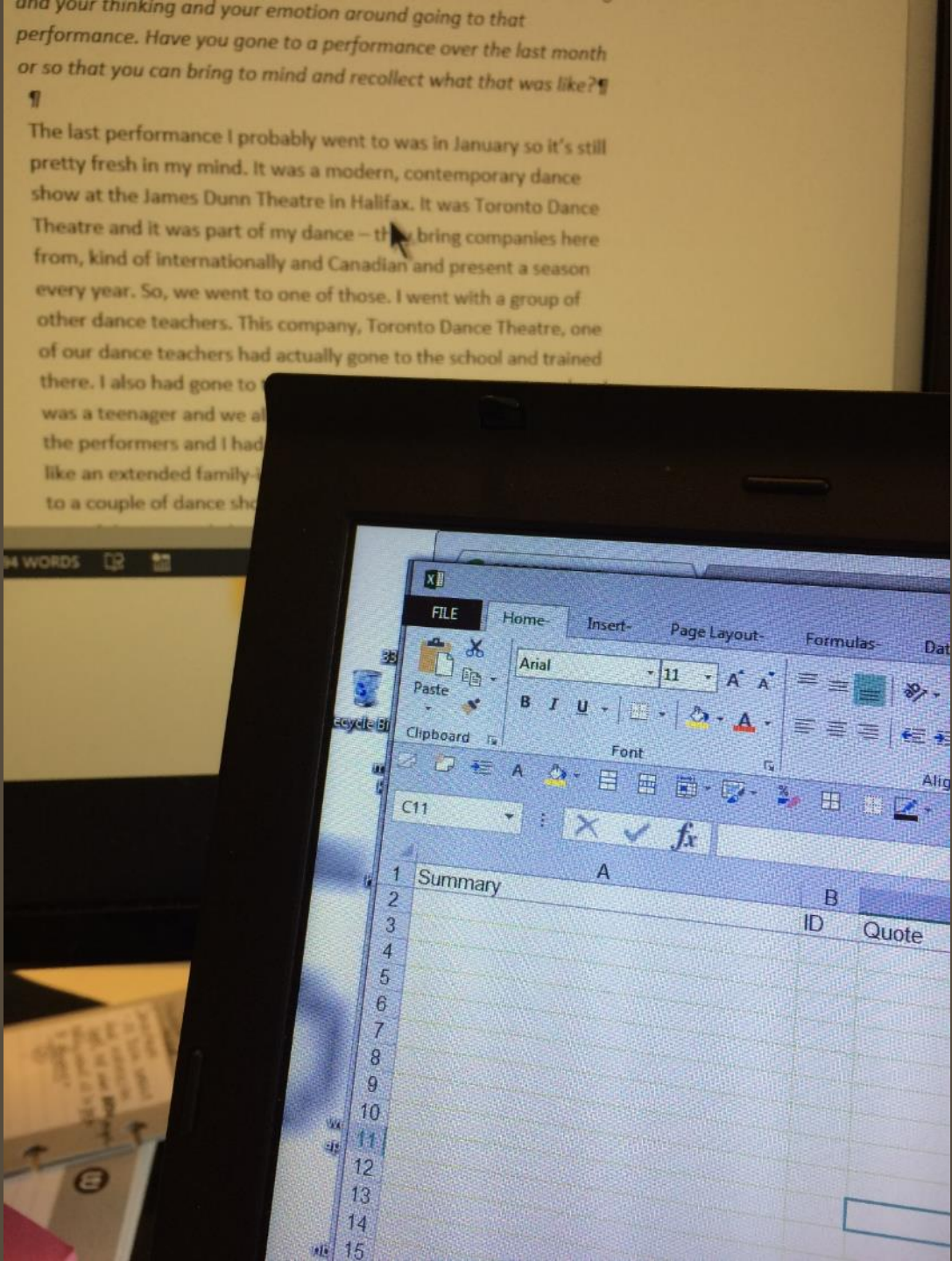
“I mark up the document with some initial reactions. For example, when I read something I'm unsure of, I mark it with a '?' so that I can return to it.”

“Another example of marking up the transcript. Notice I'm not entering the quotations into a list at this point.”

“I try to underline some specific phrases within the quote to prompt what might be the main focus of the summary.”



“When I’m ready to move to the excel sheet, I have the transcript on one screen and the list on the other.”



Perhaps linear thinking, reaction, guiding principle

Listener

All right, so can you tell me just a little bit about yourself and your job role? Your responsibilities? [P]: This is selling for optimization, which might be okay, but there's a better way to get to depth. And already you know the answers to those questions from the recruiting survey and the spoken screener. I'd jump right in with "Okay, so as we chatted about last time we spoke, I'm interested in your thought process as you"]

Speaker

Yep. So, I'm as the thread probably suggests, I'm Australian, I live in a relatively rural area, which somewhat limits development opportunities. I'm actually working at the moment at a start-up based in Ag Tech, So, the livestock industry. Basically we create sheep [unclear]

Oh, yeah, it's digitizing a paper workflow. So, tens of millions of dollars get transacted around livestock. So, someone is selling sheep to the supermarket. Most of that is currently still paperwork flow, which is just crazy. ~~part~~ part of a, part of the fact that it's the industry it's in. So, we're digitizing that workflow, which it's a... You didn't need to know that.

I'm actually the senior where... We're deliberating on what we introduced as roles at the moment, but I'm the... I'm the senior tech there, it's a team of three at the moment. We're bringing on an intern next month. So, it's a lot of supervisory, but being a start-up, I'm still very much involved in the development. And that was your issue, if I got to a point where I'm not developing, I think I would probably move on.

Listener

Yeah, why is that? ~~So, you said you have, if you weren't interested at the development you would probably move on. Why is that? What appeals to you about development?~~

Speaker

I'm a strong believer in doing what you're good at and what you enjoy doing as a job. I've always enjoyed and I've always found it frustrating that good people that are good at their job may doing their job, and manage other people doing that job. Whether management is actually a skill they're good at, versus, I mean it's a skill can be learned obviously, but I personally prefer developing to managing people and I feel I'm better at developing than I am at managing people. Which is... and it goes for every industry. You know, if you're a... You're good welder, you start welding and you become a welder supervisor. Which yeah, it's around pay scales and stuff like that obviously, but it's just what happens in every industry, I think.

Listener

Yeah, so what do you enjoy about developing? What appeals to you about it? [P]: It's a little early yet to be doing this. Yes, it's going to depth, but we don't have a framework yet. What is the block that you asked about at the top of the listening session? "Your linear thinking as you"]

Speaker

Perhaps... I have a set of tools that I have available to me, and I have an outcome that I need to achieve, and working at the path to that. It's not, I mean that can be used of most jobs as well. But this particular set of tools, I enjoy working with.

Listener

Maybe so, ~~So, how do you imagine your role kind of changing from what position things come to the point from some time around you like we mentioned [P]: Never ask about the future—that's conjecture about what I can't think, and I prefer my data to be based on what he actually did think in the past. We haven't covered any of that yet.]~~

Speaker

Almost the same, I mean I'm speaking as me now, I mean, I'm like 30, I've been a developer for... I finished school, I went to ~~university~~, I've been a developer for 15, almost 20 years. I was... I developed as a... like in New University. So, most of, I've always enjoyed it and I figured it was going to get level of it, I'd probably be level of it by now. So, I'm actually enjoying the spot I'm in at the moment. Where it is, I mean a start-up which is enjoyable, I mean, uh [P]: I always ask the manager to own the unit and you ~~have~~ the need for them [P]: a small team. We all get along really well. I have a large amount of control over the direction, technically, but, I still have a lot of involvement in taking it that direction as well.

It's not... yeah, so I probably wouldn't change a lot in five years.

I have gone through a phase in the past where I was like... You know, I wanted to become a landscaper because I was sick of sitting inside. Then I looked at my notes that you know, are manual laborers and they decided that their bodies weren't hold up past 40, so they'll need a new job elsewhere. So, I'm glad I didn't go for down that path.

Listener

05:24 - 05:25
All right make sense. So, it sounds like you've always been kind of interested in technology and development and that sort of thing.

Speaker

05:32 - 05:33

Yeah.

Listener

05:32 - 05:33
Yeah, so, ~~So, how do you imagine as that... I'm not asking about you. Do you imagine your role changing a little bit within that company as it becomes more mature [P]: conjecture.]~~

Speaker

05:44 - 06:04
Yeah, I do. So, you know it, at a point, we're talking about different titles and as we don't currently have the "CEO," "CFO," "CTO" roles, but it's functionally a "CTO" role.

introducing summaries

the summary is the atomic element
(the carefully crafted puzzle piece)
that you will work with for patterns

how to write a summary

1. start with the verb

2. <later>

3. <later>

4. <later>

5. <later>

6. <later>

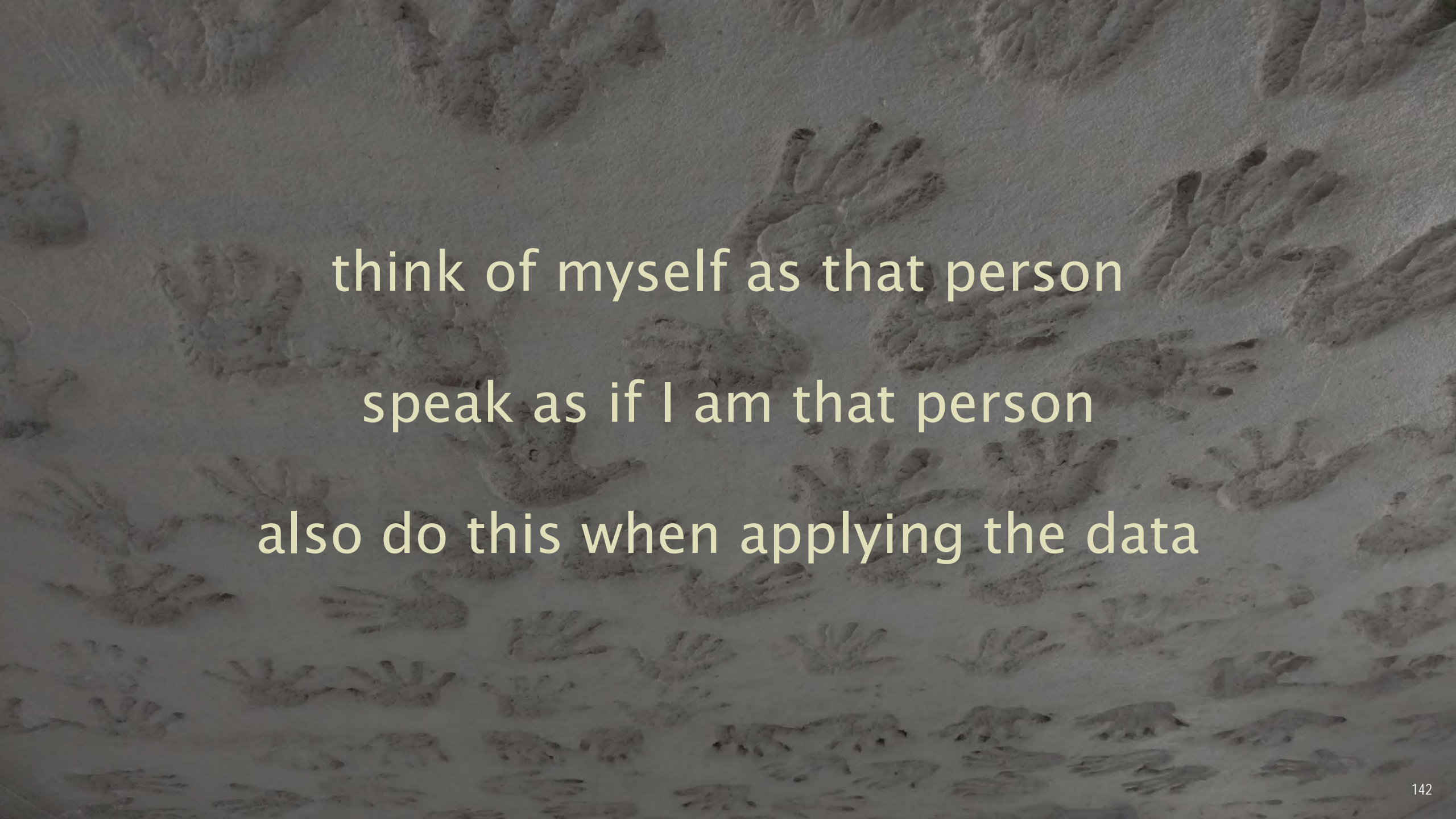
7. <later>

how to write a summary

1. start with the verb

verb in first person, present tense

to easily put yourself in their shoes



think of myself as that person
speak as if I am that person
also do this when applying the data

the verb represents the insights
you're after in the problem space

it needs to evoke a strong,
clear-cut sense of what is going
through the speaker's mind

Vague Verbs	Passive Verbs	Strong, Clear Active Verbs			
Communicate	Be	Accept	Decide	Instill	Remind
Consider	Discover	Adopt	Distrust	Isolate	Reprimand
Deal with	Find	Anticipate	Draw	Keep	Respond
Do	Get	Avoid	Emphasize	Make sure	Search
Expect	Have	Believe	Encourage	Mix	Suspect
Manage	Hear	Celebrate	Endure	Prepare	Teach
Plan on	Know	Change	Enjoy	Put off	Try
Use	Let	Choose	Feel	Realize	Tell
	Read	Convince	Fit in	Recognize	Welcome

Vague Verbs	Passive Verbs	Strong, Clear Active Verbs			
Communicate	Be	Accept	Decide	Instill	Remind
Consider	Discover	Adopt	Distrust	Isolate	Reprimand
Deal with	Find	Anticipate	Draw	Keep	Respond
Do	Get	Avoid	Emphasize	Make sure	Search
Expect	Have	Believe	Encourage	Mix	Suspect
Manage	Hear	Celebrate	Endure	Prepare	Teach
Plan on	Know	Change	Enjoy	Put off	Try
Use	Let	Choose	Feel	Realize	Tell
	Read	Convince	Fit in	Recognize	Welcome

when you're summarizing an *emotional reaction*, the verb is almost always “feel”

the emotion goes directly after the verb

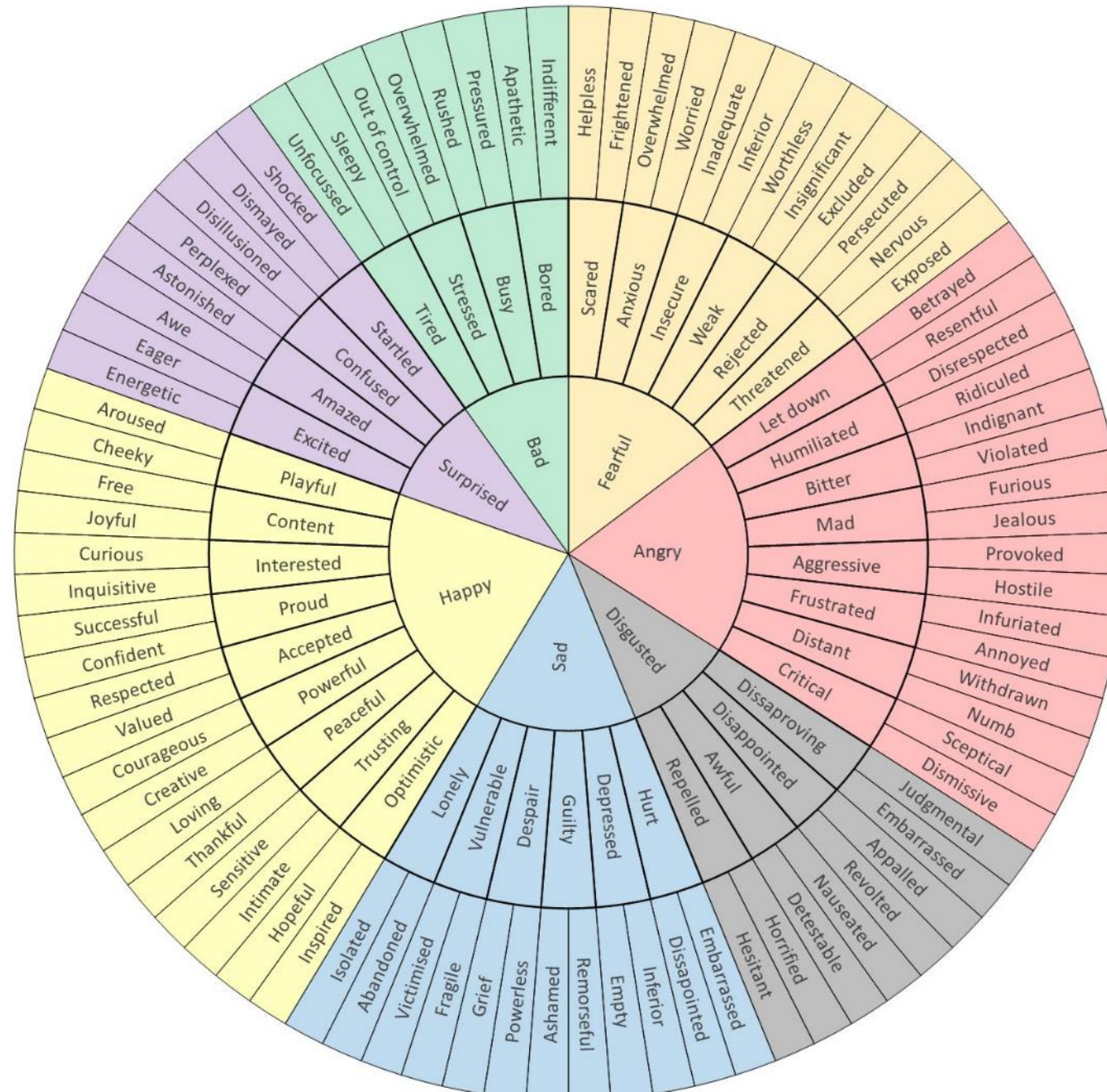
“I feel alarmed how close I came to getting hit by the truck.”

“I feel proud my daughter tells her friends not to text while driving.”

there are a couple of emotional
reaction verbs where you don't need
“feel” in front

“Worry the guy will react violently if I tell him he drives
dangerously.”

“Distrust the guy's ability to change his driving habits.”



This emotions wheel is based on Plutchik's work and was created by Someone Mysterious. It shows the adjective form of several emotions.

entranced	energetic	jubilant	tranquil
fascinated	enthusiastic	pleased	trusting
interested	giddy	tickled	
intrigued	invigorated	EXHILARATED	REFRESHED
involved	lively	blissful	enlivened
spellbound	passionate	ecstatic	rejuvenated
stimulated	surprised	elated	renewed
HOPEFUL	vibrant	enthralled	rested
expectant		exuberant	restored
encouraged		radiant	revived
optimistic		rapturous	
		thrilled	

Feelings when your needs are not satisfied


AFRAID	CONFUSED	EMBARRASSED	TENSE
apprehensive	ambivalent	ashamed	anxious
dread	baffled	chagrined	cranky
foreboding	bewildered	flustered	distressed
frightened	dazed	guilty	distraught
mistrustful	hesitant	mortified	edgy
panicked	lost	self-conscious	fidgety
petrified	mystified	FATIGUE	frazzled
scared	perplexed	beat	irritable
suspicious	puzzled	burnt out	jittery

entranced	energetic	jubilant	tranquil
fascinated	enthusiastic	pleased	trusting
interested	giddy	tickled	
intrigued	invigorated	EXHILARATED	REFRESHED
involved	lively	blissful	enlivened
spellbound	passionate	ecstatic	rejuvenated
stimulated	surprised	elated	renewed
HOPEFUL	vibrant	enthralled	rested
expectant		exuberant	restored
encouraged		radiant	revived
optimistic		rapturous	
		thrilled	


more on this next week

Feelings when your needs are not satisfied


AFRAID	CONFUSED	EMBARRASSED	TENSE
apprehensive	ambivalent	ashamed	anxious
dread	baffled	chagrined	cranky
foreboding	bewildered	flustered	distressed
frightened	dazed	guilty	distraught
mistrustful	hesitant	mortified	edgy
panicked	lost	self-conscious	fidgety
petrified	mystified	FATIGUE	frazzled
scared	perplexed	beat	irritable
suspicious	puzzled	burnt out	jittery




The **BOOK** *of*



HUMAN



EMOTiONS



From Ambigophobia to Umpty—
154 Words from Around the World
for How We Feel

TIFFANY WATT SMITH

how to write a summary

1. start with the verb

brainstorm: 2–5 words

verbs – if the concept is inner–thinking or guiding principle

emotions – if the concept is emotional reaction and the verb is “feel”

Quote	Type	Verbs Brainstorming
<p><i>I was just about to use the crosswalk, and this pickup whizzed by and blasted up the hill, going about 30–35 miles per hour. Suddenly there was a lot of adrenaline in my system.</i></p>	emotional reaction	feel alarmed, scared, surprised, taken aback
<p>What if he didn't see me?! He could have run over me, or run over my dog! ... If I had turned into the crosswalk immediately instead of going to the actual corner, or been 5 steps ahead of myself, he would have hit me!</p>	inner thinking	realize, reel, exclaim, panic, feel upset
<p>Should I run up there and tell him what just happened? Or should I just keep walking and try to ignore it? ... And this is so not like my normal, non-confrontational self. ... I remember this one quite clearly because there was real internal tension deciding whether I should go up there and tell him, or just keep going and ignore it.</p>	inner thinking	wonder, contemplate, consider, deliberate, try, struggle
<p><i>It's a guy working on a house up there</i> ... I walked two or three more steps, turned, and went up there to tell him what he did. ... He's going to be working up there another 5 months. I should go up there and say something. ... It was my public service.</p>	inner thinking	decide, figure, choose, spread
<p>“You should be more careful. You almost just ran me over!” ... My mind kept thinking of things I should tell him. Like, “How would you like to take a dead dog to your kids and tell them what happened?” You think of all sorts of things you could say</p>	inner thinking	... your turn

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<p>“You should be more careful. You almost just ran me over!” ... My mind kept thinking of things I should tell him. Like, “How would you like to take a dead dog to your kids and tell them what happened?” You think of all sorts of things you could say</p>	inner thinking	prepare, make, rehearse, inform, clarify, draw, emphasize, figure out, deliberate, teach, list, scold, explain, inform, imagine, agonize, reprimand

homework

homework logistics – Live class participants

Live: We will share a Google combining sheet with you, either **Group A** or **Group B**.

- Duplicate the Source data to a new 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

On the platform: Please either download the transcript or recording. There are also lots of other nifty materials up there, plus an exercise to test your surface-versus-depth skills.

homework logistics – Follow–along participants

Follow–along: You will do your homework using an Excel spreadsheet (assuming you can open it). There will be no homework review by Indi, but there is a cheat sheet you can use to check your work.

On the platform: Please download the transcript or recording, the spreadsheet, and the cheat sheet. There are also lots of other nifty materials up there, plus an exercise to test your surface–versus–depth skills.

Group A homework due (for review) 14-Feb pm

Group B homework due (for review) 18-Feb noon
or earlier (yes!)

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

(too difficult to review homework retroactively)

homework

Purpose:

What went through your mind when you were deciding whether to go to a restaurant during this pandemic?

Study: Andrew Herndon (participant in these courses)

Listener: Indi Young (who had a hard time getting this participant to get comfortable with the format, so this is a great demo of that struggle)

homework for each quote: decide type & list some verbs (1 hour)



1. **Optional:** Read the first 1–7 pages of the DDS06 transcript or listen to around 15–20 minutes of the recording.
2. On the first 7 pages of the transcript, highlight or underline the inner thinking, emotional reactions & guiding principles.
3. Decide the type of the quotes & brainstorm verbs. On the sheet (Excel or Google) there are **already 15 quotes**.
 - a) Write in “Type” column what the quote represents: inner thinking, reaction, or guiding principle.
 - b) Brainstorm 2–5 verbs representing the concept. (If it is an emotional reaction, the verb is usually “feel,” so brainstorm some **emotions**.)
 - c) NOTE: You are not yet writing summaries.

Optional: There is an exercise on the platform plus other extra material, including a sneak–peek of Indi combing and summarizing one of the transcripts in this study.

(A)
Live Online Classes

Join a class of 25 or less participants, from around the globe. Classes are taught online live by Indi.


Follow-along Option

If you cannot attend class, but still want to follow along with the latest course as it is taught, this is a great option for you.

Archived Access

If the course you are interested in is not coming up soon enough, consider the archived recording.

Rosenfeld Media all-books discount:



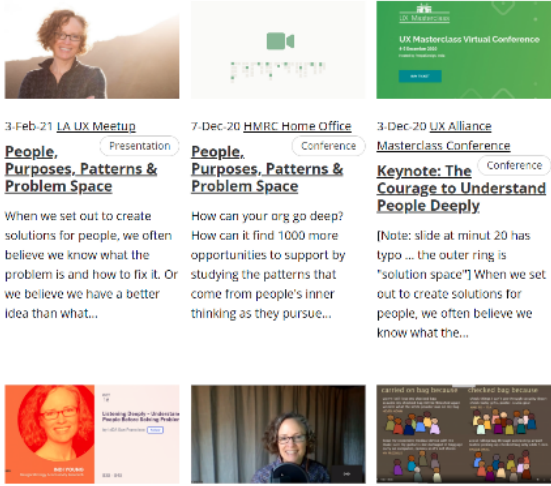
DISAPPOINTEDFALCON20

What topics to bring to a coaching appointment?

You can use these appointments to review your work, or for any number of other reasons for example:

- Clarify how to do something
- Check in on your project
- Define or re-frame the scope of research
- Get your stakeholders behind your efforts, rather than confused
- Check your listening skills for areas of improvement
- Review your data analysis
- Review your thinking styles

Watch past talks [Events archive](#) · [Watch more on Youtube](#)



3-Feb-21 **LA UX Meetup** Presentation
People, Purposes, Patterns & Problem Space
When we set out to create solutions for people, we often believe we know what the problem is and how to fix it. Or we believe we have a better idea than what...

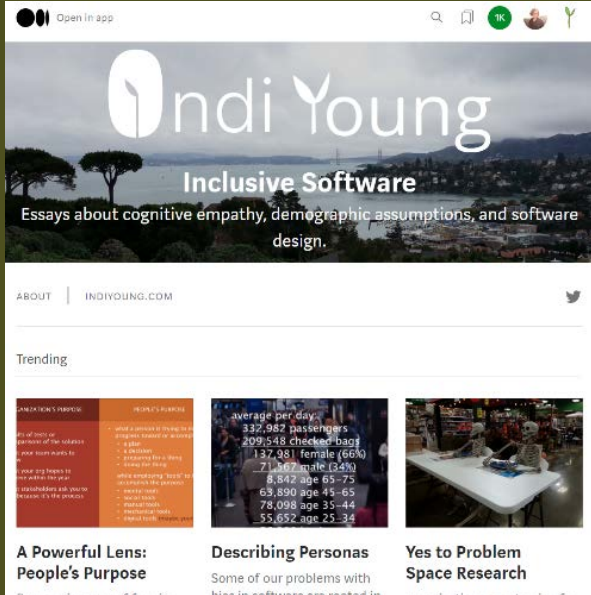
7-Dec-20 **HMRC Home Office** Conference
People, Purposes, Patterns & Problem Space
How can your org go deep? How can it find 1000 more opportunities to support by studying the patterns that come from people's inner thinking as they pursue...

3-Dec-20 **LUX Alliance** Masterclass Conference
Keynote: The Courage to Understand People Deeply
[Note: slide at minut 20 has typo ... the outer ring is "solution space"] When we set out to create solutions for people, we often believe we know what the...

16-Oct-20 **ixDA SF** Workshop
Listening Deeply - Understand People Before Solving

11-Mar-20 **Design for Digital** Conference
Closing Keynote: Paying Better Attention to the

24-Feb-20 **Apex Webinar** Webinar
Paying Better Attention to the Problem



Indi Young
Inclusive Software
Essays about cognitive empathy, demographic assumptions, and software design.

ABOUT | [INDIYOUNG.COM](#)

Trending

- A Powerful Lens: People's Purpose**
- Describing Personas**
Some of our problems with...
- Yes to Problem Space Research**

medium.com/inclusive-software



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