



# CONCEPTS & SUMMARIES

PART 1: UNDERSTANDING WHAT WAS SAID

Advanced Training Course  
Class #4  
@indiyoung

# 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

# warmup exercise

what are the ways that concepts  
tend to appear in a transcript?

concept	a single topic (usually at depth) stated in contiguous sentences and phrases
repeated concept	another sentence or phrase that appears later in the transcript which belongs with an earlier concept
tangled concept	a concept that is closely intertwined with another, making it easily missed
implied concept	a concept that is not stated outright by the speaker; sometimes worth pulling out—but other times not; might be clarified later in the transcript



what is this photo supposed to remind you of?

The background of the slide is a close-up, top-down view of a sandy surface covered with numerous handprints. The prints are of various sizes and orientations, some appearing as simple impressions and others as more defined shapes. The lighting is soft, creating subtle shadows that emphasize the texture of the sand and the ridges of the prints. The overall tone is muted and earthy.

think of myself as that person

speak as if I am that person

also speak as that person when applying the data

# homework review



## two leading questions about the homework

did anyone have trouble forming  
cognitive empathy with that speaker?

did anyone recite your homework  
summaries out loud?

# homework find concepts and create summaries (1–2 hours)



1. Read the first half of the transcript to see what the story is in full. Check out Indi's comments along the way. (The recording got lost.)
2. On the first 5 pages of the transcript, highlight or underline the inner thinking, emotional reactions & guiding principles.
3. On the sheet there are already a few quotes. These quotes are all at Depth. Fill in types, verbs, summaries as usual.
  - a) Pick a verb and write your key topic. (follow the formulas)
  - b) Add some supporting detail. (think about comic panels).
  - c) Underline the words the Speaker said which you chose to include in your summary.
4. Pull more quotes from the transcript and summarize them in the list. You can use Indi's comments as a guide.
  - a) Do steps a, b, c, d from number 3 above for each.

[Indi shows homework #3 cheat sheet as we discuss feedback

- avoid any vocabulary that is not in the transcript! e.g. she never uses the word "extensive" in the transcript, so you cannot use it in the summary
- try not to distill it. Just make a smaller more perfect version of the quote/concept
- not enough personalization, memorable phrases
- I am this person at this moment in this place. I am thinking/feeling \_\_\_\_\_
- merged the "right direction" back in with row above, as memorable detail
- lots of people thought the guiding principle about sitting on the aisle was so that she wouldn't inconvenience anyone, but that's an assumption. What she said was that she didn't want to hop over anyone.
- still some folks writing two sentences. Use the prepositional phrases on slide #14 below to hook on the memorable details so that you have one sentence.
- remember to balance strong vs. weak and your confidence in this
- When I find myself writing "trying to" I always take a second to see if it could be inner thinking "try to" or if I could simplify and get rid of the "trying to" part.
- When I find myself writing "verb x to verb y" it's a point at which I consider simplifying to one verb ... "Leave early to give ourselves time"

first formula is for reasoning and  
guiding principles:

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

second formula is for emotional reactions:

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

hook the **supporting detail** on with  
these words

about	from
at	since
because	that
by	when
despite	whereas
even though	while

use any preposition or conjunction,  
but don't make it a separate/compound sentence

did we come up with the same concepts?

some logistics



# merging, splitting & pruning

for when a summary is giving you trouble

- recast the type if it's giving you trouble

# if it's giving you trouble ...

Summary	ID	Quote	Type	Brainstrm
	001 UD	it's really strange because when I go to a hospital if I had to have a procedure done or anything, I'd say, "I have mastocytosis," and they'd all go, "What?" So it was before the internet days; they would have to go get a medical book and look it up. Then you're like, "Well why am I here if you don't even know what it is?"	reaction	feel amazed, annoyed, confused, ignored ...?
<b>Wonder</b> why I'm here for <u>a procedure</u> <u>when I tell a doctor I have mastocytosis</u> and <u>they have to go look it up</u>	001 UD	it's really strange because when I go to a hospital if I had to have a procedure done or anything, I'd say, "I have mastocytosis," and they'd all go, "What?" So it was before the internet days; they would have to go get a medical book and look it up. Then you're like, "Well why am I here if you don't even know what it is?"	inner thinking	wonder, question, suspect, hesitate

for when a summary is giving you trouble

- recast the type if it's giving you trouble
- is it a tangled concept—does it need **splitting**?

# if it's giving you trouble ...

TANGLED SUMMARY	ID	QUOTE	TYPE
<u>Feel furious there's no curb cuts and I could have gotten killed trying to get my wheelchair down a driveway into traffic because I expect more from our community</u>	104	There was no curb cut. I was furious. Like there's no curb cuts in any of the four corners of either intersection. I have to take my wheelchair down a driveway into traffic to cross the street. We're in the 21st century! I could have gotten killed doing that! I just get riled up about it because I just expect more from our community. It's a public transit bus. How are you supposed to get to a bus?	emotional reaction

CLEAR SUMMARIES	ID	QUOTE	TYPE
<u>Feel furious that I have to risk getting killed in my wheelchair because there is no curb cut and I have to go down a driveway into traffic</u>	104	There was no curb cut. I was furious. Like there's no curb cuts in any of the four corners of either intersection. I have to take my wheelchair down a driveway into traffic to cross the street. ... I could have gotten killed doing that!	emotional reaction
<u>Feel riled up that the community has not provided curb cuts at the public transit bus, even in the 21<sup>st</sup> century</u>	104	We're in the 21st century! ... I just get riled up about it because I just expect more from our community. It's a public transit bus. How are you supposed to get to a bus?	emotional reaction

for when a summary is giving you trouble

- recast if it's giving you trouble
- is it a tangled concept—does it need **splitting**?
- is it too weak by itself—should it **merge** with something else?

# if it's giving you trouble ...

Summary	ID	Quote	Type	Brainstrm
Feel reassured when the shuttle comes and we were are on our way to the airport	808	"I'm glad that the shuttle came," and, "Okay, now we're on our way to the airport. ... I felt like a sense of relief, kind of, that – you know, 'cause you get nervous sometimes wondering – okay, is the shuttle gonna show up? So, yeah, I was very satisfied and just felt relieved.	reaction	feel relieved, nervous, reassured
<not strong enough>	808	Do we know we're in the right direction?"	inner thinking	wonder, worry
Feel relieved that our park-and-ride shuttle shows up and I don't have to wonder when it will come or think about which is the right direction to go	808	"I'm glad that the shuttle came," and, "Okay, now we're on our way to the airport. Do we know we're in the right direction?" ... I felt like a sense of relief, kind of, that – you know, 'cause you get nervous sometimes wondering – okay, is the shuttle gonna show up? So, yeah, I was very satisfied and just felt relieved.	reaction	

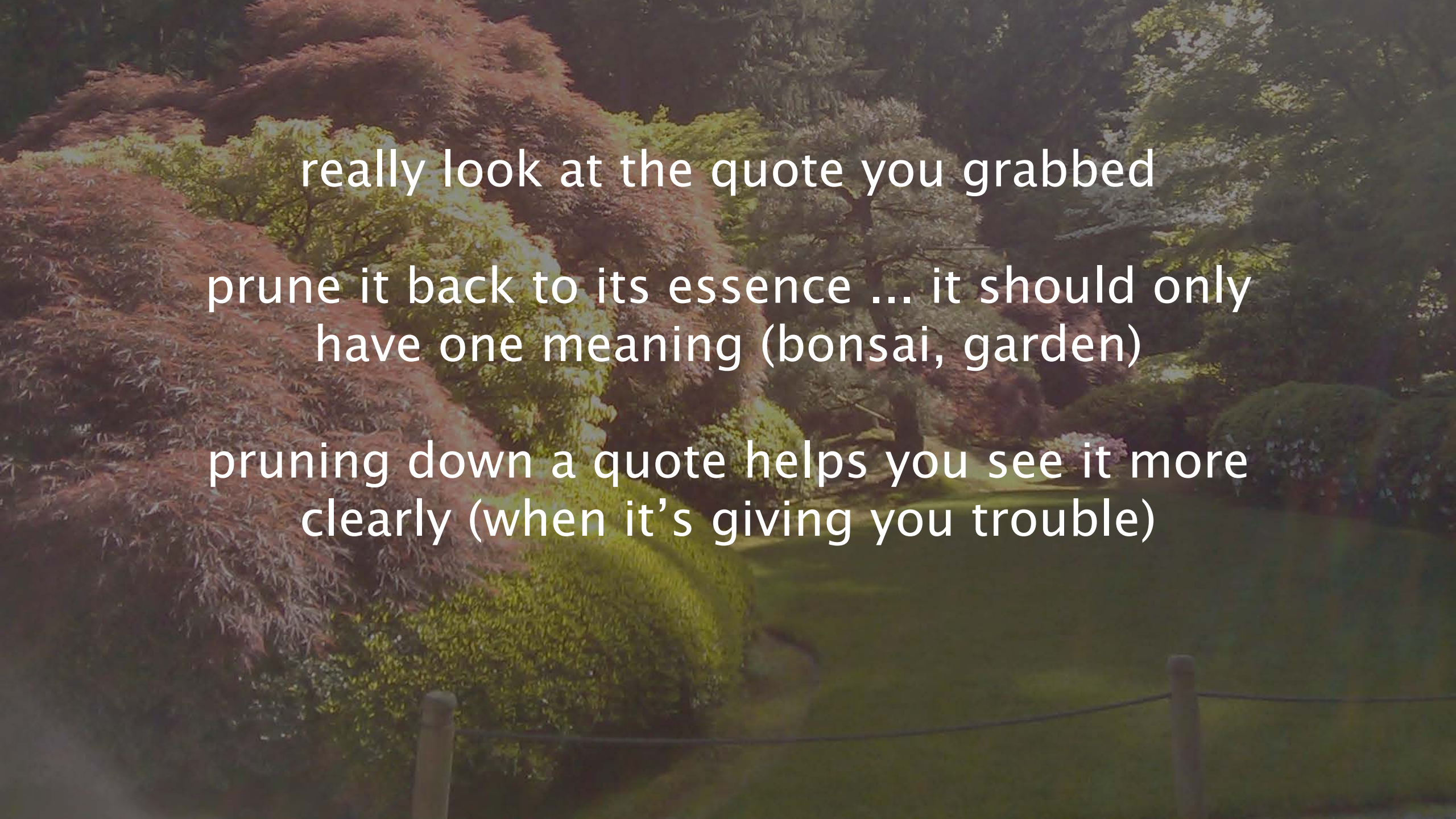
# analogy of pruning

when you prune a fruit tree, you try to prune out the old stuff & only leave the most productive/budding twigs behind



remove words that are **not part of this concept** or **memorable detail**  
... helps simplify the meaning in your mind  
... so that the shape of the concept is clear



A photograph of a traditional Japanese garden. A stone path winds through the scene, flanked by various trees and shrubs. In the foreground, a simple wooden fence with a rope runs across the frame. The overall atmosphere is serene and well-maintained.

really look at the quote you grabbed  
prune it back to its essence ... it should only  
have one meaning (bonsai, garden)  
pruning down a quote helps you see it more  
clearly (when it's giving you trouble)

Summary	ID	Quote	Type
	808	<p>it was a self-check-in kiosk it was called, so I've never used that before, so I was getting frustrated...When I was trying to check-in and get my boarding passes. So, 'cause it was asking me to scan my passports, and I didn't know how to scan it in which direction...I guess this is a new way to do things...But between me and my husband, we figured it out. I asked the woman at the desk if she could help me, and her response was, "It's a self-check-in kiosk." ... The woman just like stood there, and there was other people that just like - I don't understand - I still don't understand why she couldn't help me. The boarding passes printed, we figured out how to scan our passports, and then she took the baggage from us. That seems to be all she did was take the baggage. So, that was frustrating, 'cause I feel like you're getting paid to do a job. Why are you just standing there?...When someone's actually asking for help, and their response is, "No, this is a self-check-in counter," that, to me, is - you know - not acceptable.</p>	reaction

Summary	ID	Quote	Type
	808	<p>it was a self-check-in kiosk it was called, so I've never used that before, so I was getting frustrated...When I was trying to check-in and get my boarding passes. So, 'cause it was asking me to scan my passports, and I didn't know how to scan it in which direction...I guess this is a new way to do things...But between me and my husband, we figured it out. I asked the woman at the desk if she could help me, and her response was, "It's a self-check-in kiosk." ... The woman just like stood there, and there was other people that just like - I don't understand - I still don't understand why she couldn't help me. The boarding passes printed, we figured out how to scan our passports, and then she took the baggage from us. That seems to be all she did was take the baggage. So, that was frustrating, 'cause I feel like you're getting paid to do a job. Why are you just standing there?...When someone's actually asking for help, and their response is, "No, this is a self-check-in counter," that, to me, is - you know - not acceptable.</p>	reaction

Summary	ID	Quote	Type
	808	it was a self-check-in kiosk it was called, so I've never used that before, so I was getting frustrated...When I was trying to check-in and get my boarding passes. So, 'cause it was asking me to scan my passports, and I didn't know how to scan it in which direction...I guess this is a new way to do things...But between me and my husband, we figured it out.	reaction
	808	I asked the woman at the desk if she could help me, and her response was, "It's a self-check-in kiosk." ... The woman just like stood there, and there was other people that just like - I don't understand - I still don't understand why she couldn't help me. The boarding passes printed, we figured out how to scan our passports, and then she took the baggage from us. That seems to be all she did was take the baggage. So, that was frustrating, 'cause I feel like you're getting paid to do a job. Why are you just standing there?...When someone's actually asking for help, and their response is, "No, this is a self-check-in counter," that, to me, is - you know - not acceptable.	reaction

Summary	ID	Quote	Type	Brainstrm
	808	it was a self-check-in kiosk <del>it was called, so</del> I've never used that before, so I was getting frustrated...When I was trying to check-in and get my boarding passes. <del>So, 'cause</del> it was asking me to scan my passports, and I didn't know how to scan it in which direction...I guess this is a new way to do things...But between me and my husband, we figured it out.	reaction	feel frustrated, helpless, confused
<p><b>Feel</b> <u>frustrated at the self-check-in kiosk because I have never used one</u> and have to <u>figure out which direction to scan our passports</u></p>	808	it was a self-check-in kiosk ... I've never used that before, so I was getting frustrated...When I was trying to check-in and get my boarding passes. ... it was asking me to scan my passports, and I didn't know how to scan it in which direction... I guess this is a new way to do things... But between me and my husband, we figured it out ... <b>how to scan our passports</b>	reaction	feel frustrated, helpless, confused

Summary	ID	Quote	Type
	808	<p>I asked the woman at the desk if she could help me, and her response was, "It's a self-check-in kiosk." ... The woman just like stood there, <del>and there was other people that just like -- I don't understand -- I still don't understand</del> why she couldn't help me. <del>The boarding passes printed, we figured out how to scan our passports, and then she took</del> the baggage from us. That seems to be all she did was take the baggage. <del>So, that was frustrating, 'cause I feel like you're getting paid to do a job. Why are you just standing there?...</del>When someone's actually asking for help, <del>and their response is, "No, this is a self-check-in counter,"</del> that, to me, is - you know - not acceptable.</p>	reaction
<p><b>Feel</b> incensed by the <u>unacceptable attitude of the woman at the baggage kiosk</u> because she refused to help me when I asked and only stands there repeating "<u>this is a self-check-in kiosk</u>"</p>	808	<p>I asked the woman at the desk if she could help me, and her response was, "It's a self-check-in kiosk." ... The woman just like stood there ... I still don't understand why she couldn't help me. The boarding passes printed ... then she took the baggage from us. That seems to be all she did was take the baggage. ... frustrating ... you're getting paid to do a job. Why are you just standing there?...When someone's actually asking for help ... that ... is ... not acceptable.</p>	reaction

Summary	ID	Quote	Type
	103	<p>I can't pay, because I'm not working...And there's not a whole lot, there's not a whole lot of grants out there from what I've been told if you are married, you know what I'm saying? There's a lot more if you're a single mom or whatever. But not as many if you're married...different friends of mine that are in college. And like the ones that are single with no kids versus the ones that are single with kids or married with kids. And the, you know, the kind of grants versus scholarships that they got...And like my sister went to college, my cousin went to college. They're single parents. Single moms. And they got everything paid for...Both of them were in Michigan. So I don't know if it's a little bit, you know, different. But they just went to the different colleges and went to the financial advisor, I guess...And they helped them with it...I haven't heard a whole lot more about it. I know, like I said, I know you know, what we were able to get and not get with my husband.</p>	reaction

Summary	ID	Quote	Type
	103	<p>I can't pay, because I'm not working...<del>And there's not a whole lot, there's not a whole lot of grants out there from what I've been told if you are married, you know what I'm saying?</del> There's a lot more if you're a single mom or whatever. <del>But not as many if you're married...</del> different friends of mine that are in college. <del>And like the ones that are single with no kids versus the ones that are single with kids or married with kids. And the, you know, the kind of grants versus scholarships that they got...</del> And like my sister went to college, my cousin went to college. They're single parents. Single moms. And they got everything paid for...Both of them were in Michigan. <del>So I don't know if it's a little bit, you know, different. But they just went to the different colleges and went to the financial advisor, I guess...</del> And they helped them with it...<del>I haven't heard a whole lot more about it. I know, like I said, I know you know,</del> what we were able to get and not get with my husband.</p>	reaction

Feel discriminated against as a married person while looking for grants because my sister and cousin are single moms and got everything paid for in Michigan

103	<p>I can't pay, because I'm not working ... there's not a whole lot of grants out there ... if you are married ... There's a lot more if you're a single mom ... different friends of mine that are in college ... my sister went to college, my cousin went to college. They're single ... moms. And they got everything paid for ... Both of them were in Michigan. ... they just went to the ... financial advisor ... And they helped them with it ... I know ... what we were able to ... not get with my husband.</p>
-----	---

reaction



example of team discussing pruning

<p>Feel confident about the doctor doing a severe operation because of how well he explained it to me and my daughter</p>	<p>001-CC</p>	<p>The way he was talking to me, I understood everything he was saying. Like I said, he made me feel very comfortable about the surgery and about him, too ... he had a way of talking to you and talking to my daughter, me and my daughter. It put me at ease. I wasn't uncomfortable thinking about him doing the operation and all, you know. Like you said, some doctors make you feel so uncomfortable, they talk at you rather than to you. You don't know if you really should go through with that or not. Or make you feel like you're not doing what you're supposed to be doing... But he had told me the operation would be kind of severe. ... he did mention collapsing my lungs and I said if you collapse my lung, I'm dead, basically, ain't I? He was saying that they would have had to, I think, break some of my ribs... he had to take out three of my vertebra, and then he put two metal plates in. He screwed them in with screws.... What he said the other doctors would have to do, it sounds so much more complicated than what he did. What he did was complicated, but it sounded like they would have had to do even more.</p>	<p>reaction</p>	<p>lame, I know.</p>
---	---------------	---	-----------------	----------------------

Feel comfortable about the severe operation because the doctor is talking to me instead of at me and I understand everything he was saying

001CC-BOS

~~It was like he was talking to me and some doctors seem to talk at you. He just made me feel so comfortable....~~The way he was talking to me, I understood everything he was saying. Like I said, he made me feel very comfortable about the surgery and about him, too ... he had a way of talking to you and talking to my daughter, me and my daughter. It put me at ease. I wasn't uncomfortable thinking about him doing the operation and all, you know. Like you said, some doctors make you feel so uncomfortable, they talk at you rather than to you. You don't know if you really should go through with that or not. Or make you feel like you're not doing what you're supposed to be doing... ~~But~~ he had told me the operation would be kind of severe. ... ~~he did mention collapsing my lungs and I said if you collapse my lung, I'm dead, basically, ain't I? He was saying that they would have had to, I think, break some of my ribs... he had to take out three of my vertebra, and then he put two metal plates in. He screwed them in with screws.... What he said the other doctors would have to do, it sounds so much more complicated than what he did. What he did was complicated, but it sounded like they would have had to do even more.~~

reaction

lame, I know.  
CB: Nah. :) I think all the gruesome surgery details make it a little overwhelming to sort out. I tuned them out and then it made more sense to me, so I rephrased to focus on him talking to rather than at, and also grabbed one more sentence from the transcript about that

Feel comfortable about the severe operation because the doctor is talking to me instead of at me and I understand everything he was saying

001CC-BOS

It was like he was talking to me and some doctors seem to talk at you. He just made me feel so comfortable....The way he was talking to me, I understood everything he was saying. ... he made me feel very comfortable about the surgery and about him, too ... he had a way of talking to ... me and my daughter. It put me at ease. I wasn't uncomfortable thinking about him doing the operation and all ... some doctors make you feel so uncomfortable, they talk at you rather than to you. You don't know if you really should go through with that or not. Or make you feel like you're not doing what you're supposed to be doing.

reaction

lame, I know.  
CB: Nah. :) I think all the gruesome surgery details make it a little overwhelming to sort out. I tuned them out and then it made more sense to me, so I rephrased to focus on him talking to rather than at, and also grabbed one more sentence from the transcript about that  
IY: I pruned it even more, but kept the beautiful summary.

comparison: user interview transcript

(let's look at a user interview transcript for surface vs. depth)

participant ID's

in a study, tag each participant with a  
unique identification

then tag every quote & summary with the  
participant ID it came from

sequential numbers; number sets for each project  
client or project initials  
year or month



1	2	A	B	C	E	F	G
1		Mental Task	Task	Atomic Task	ID#	Quote	
	270	Figure Out What Is Wrong					
+	271	Worry If It Is Serious					
+	300	Find a Doctor					
+	347	Schedule appointment					
+	356	Go See Doctor					
-	436	Describe Problem to Doctor					
.	437	Tell Doc About the Problem					
.	438			Tell doc how lon	MM3	Tell them why I've gone to see them ... how long I've had the problem and I tell th	
.	439			Explain to my dc	MM16	I go in there and I explain to him what's going on.	
.	440						
.	441	Ask Doc About Problem					
.	442			develop a partn	MM23	If I'm uncertain about something I'll just ask him (doctor) then and there...	
.	443			ask my doctor q	MM31	I ask questions	
.	444			forget to ask th	MM10	I forget to ask him sometimes. That's the problem. Some things I want to ask him	
.	445			Go to hand surg	MM3	I went to the hand surgery clinic here and she brought it to my attention, too, and	
.	446			Ask doctor abou	HW02	If I see something on my chart I ask him, what is that? How can I not look at wha	
.	447			ask for visit inf	MM11	And the doctor make a lot of notes. I say, "Can you put that in writing so we can	
.	448						
.	449	Describe Symptoms to Doc					
.	450			Give my inform	MM30	You give your information to doctor so they based on their experience to tell you t	
.	451			Tell my doctor a	MM14	I went to him anyway and I told him about my feet hurting...	
.	452			need to seek me	MM22	I said well I don't know what's causing this lower pain on my right side	
.	453			Explain my symt	MM16	I went to the doctor, of course, and I was explaining to my doctor	
.	454						
.	455	Complain About Pain					
.	456			Complain about	HW01	I was complaining about a lot of pain	
.	457						
.	458	Ask Doc About What I Read / Saw on TV / Printout					
.	459			take research to	MM29	So then I basically printed out everything and went to my doctor and I said, well, y	
.	460			take research to	MM29	So then I basically printed out everything and went to my doctor and I said, well, y	

1	Men Tower Box	Summary	ID	Quote
2	Decide to Get Something to Eat			
3	Decide to Eat Now in Preparation			
4	Eat Lunch Early bc Small Breakfast	Eat Lunch Early Because Small Breakfast	105	I don't think I ate much for breakfast th
5	Grab Something Before So not Hungry Later	grab fast food before meeting so I'm not	106	In between meetings, you can grab som
6		Grab Breakfast Quickly On The Way to Fo	105	we wanted to get some breakfast real c
7	Fuel Up Before Arriving	Fuel Up Before Arriving	135	I was on my way up to the resort so I fig
8	Eat Out to Avoid Chore of Cooking			
9	Feel Planning/Cooking at Home is Hard	Eat out because its hard to plan and cook	106	it's hard for me to sometimes come hor
10	Eat Out To Avoid Cooking Full Meal In Evening	Eat Out At 3 To Avoid Cooking Full Meal I	131	So if they're hungry and they want to e
11		Wonder If I Should Cook	126	I didn't know whether I should cook son
12	Feel Like Eating Out When Get Home Late	Eat Out Because Got Home Late/Don't Wa	105	I got home late and I didn't wanna cook
13	Eat Out When I'm Feeling Lazy	Get Fast Food When Feeling Lazy	126	Just pure laziness, I guess... Pure lazine
14	Grab Something When Nothing At Home/Work			
15	Grab Something When Nothing At Home	Grab Something When Nothing At Home	105	I'm going home. I know there's nothing
16	Go Out bc Nothing I Have at Work Appealing	Go Out Because Nothing I Have at Work	124	I didn't want any of the, like, fast what
17	Worry Stopping for Food Makes Me Late to Work	Worry Stopping for Food Makes Me Late t	126	I didn't have to worry if I was going to b
18	Eat Out When Pressed for Time			
19	Eat Out When In a Pressed for Time/Tired	Chose Fast Food Place Because We Were	131	we were kind of in a rush and I decided
20		Choose To Eat Out When I'm In A Hurry	111	typically, when I'm going out and eatin
21		Go to Coffee Shop bc No Time At Home	114	I usually make a cup of coffee. That w
22	Grab Something to Eat Really Fast	Grab Food To Eat Really Fast When Busy	102	if it's a busy time of our month ... it's t
23	Feel Guilty Because I Didn't Have Time to Cook	Feel Guilty Because I Didn't Have Time to	118	I was in a rush because we had just left
24	Grab Something to Eat on the Way			
25	Grab Something to Eat on the Way	grab it to go so I can eat on the way to m	106	In between meetings, you can grab som
26		Decide to Stop in Drive-Thru for Snack or	116	I was a little hungry about 11:30 or 11:4
27	Believe Nobody Cooks in Busy Society			
28	Believe Busy Society Means Eating On The Go	Believe Busy Society Means Eating On Th	103	And we're just a busy society. It's alwa
29	Believe Nobody Wants to Cook	Think people eat fast-food because nobo	135	Nobody wants to cook.

	A	B	C	D	E	F
1	Summary	ID	Quote	Type	Reviewer Comments	Original Summary
2	Learn through trial and error how to balance chores between overdoing it, where I'm out of commission for days, and underdoing my movement which makes the arthritis worse	008CC -BOS	mobility issues ... I have diabetes for one and then I'm starting to get neuropathy in my feet and my legs, so I have severe arthritis in my spine ... I try to not do anything that's going to really aggravate it. It's kind of a balancing act, actually. I can't overdo it, but I can't under-do it, 'cause if I underdo it I'm _____, I can't move. If I overdo it I'm out of commission for days. So it's been a battle for me trying to find where is the medium for me ... Well you know it kind of came through trial and error because I feel fine mentally as far as, okay, I wanna do these things, but I learned the hard way once I got into it or I would go and do something and I would pay.	reasoning	IY: Whut? Not making sense.	Battle with balance not underdoing it then I can't move, overdoing it when I do these things, but then I'm out of commission for days.
3	Fear being in severe pain when I get ready to wash dishes, because I don't know how much is too much	008CC -BOS	So I have this fear now of when I get ready to do something, just afraid that I'm gonna be in severe pain afterwards. So that's been keeping me – I kinda look at something and say, oh, I don't know, is this something I can really do? Just something as simple as washing dishes, standing too long. ... before I wouldn't know how to stop. I would think, okay, I can just go on, but then I realized I can't do this because later I paid. I paid for it because now I'm out of commission and can't move for days.	reaction		Fear being in severe pain afterwards when I get ready to wash dishes, but if I overdo it I'll be out of commission and can't move for days
4	Let pain be my guide and immediately stop whatever activity I'm doing, whether I finished it or not, when I start feeling pain	008CC -BOS	So I just basically I think, I let the pain be my guide... it was a trial and error process and now I kinda get this, I don't know, I guess my signal is for pain... I start feeling pain, I immediately stop whatever activity it is I'm doing, whether I finished it or I didn't, because I just don't wanna have to go through just being laid up for a couple of days and not being able to move,	reasoning		
	Feel frustrated that pain dictates when I can go out and what I can do	008CC -BOS	It's frustrating mentally. Some days it's harder than others ... I'm constantly in pain all the time and I can't really go out and do a lot of shopping... it's been starting to interfere with a lot of social events.	reaction		

for longitudinal studies over several  
months or years,  
use the same ID for the same participant  
throughout

... so you can decorate the towers to indicate thinking styles or attributes within the towers of the mental model diagram

Doing It My Way

Respected Expert

Team & Crowd Player

Blend

## 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 Answers

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

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

### 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

Point Someone In The Right Direction

Give Friend a Few Different Ways of Looking At It

Suggest Look at Specific Section of Manual

Suggest People Stop Habits Causing Problems

Suggest Sending Bug to Vendor on Group

Mentor Friend Who is Learning to Program

Send Solution to Interested People (external & internal)

Post Obscure Issue I Just Solved So Others Know

Upload Solutions to the Group

Pass Explanation of Code to Others at Company

De-Prioritize Case with Vendor If I Solve It

Avoid Repeating Same Prob by Sharing Sol

Wish Company Does Better Job Promoting Forum

### Correct Mistakes I See in Posted Answers

Correct Mistakes I See in Forums

Correct the Mistakes in the Sample Code

Worry Posted Code Can Be Misinterpreted

Avoid Giving Corrections bc Would Piss Off Poster

### Support My Community Better

Build Forum for My Community

Feel Surprised So Many Others Using Our Answers

pace of combing

whole bunch of ways to approach  
combing & summaries

plop in a bunch of quotes/paragraphs & prune later

or

do pruning as you go, revising summary a little



because concepts repeat and  
are tangled or implied

make summaries later, to focus on concepts

or

make summaries as you go, to help understand concept

	A	B	C	D	E	F
1	Summary	ID	Quote	Type	Comment	
2	Hope that my partners' expertise will allow us to r	107	I had a vision for the company that led to forming it as an LLC with th	reaction		
3	Feel concerned that I was the only partner getting	107	we were getting some larger contracts and I was getting more conce	reaction		
4		107	need to actually think about how this business was going to live into	reasoning		
5	Feel pleased that I can move past my anxiety abou	107	I've never done these things before as a small business person, but I	reaction		
6	Decide I can avoid legal counsel because I'm prett	107	I also didn't want to get legal counsel. ... I had worked with attorneys	reasoning		
7		107	I needed insurance advice because that was a requirement. ... as I decid	reaction		
8		107	I'm not a Donald Trump. I'm a nice guy. I said let's keep doing business, but since you're not pay			
9		107	in order to sign these contracts I need to know the status of business and I would be paying you			
10		107	two people I'd asked to inform me ... I talked to my tax advisor who has worked with my tax situ			
11		107	I trusted my tax advisor to be the first step and to have her tell me you need to talk to somebod			
12		107	she said oh I think you can figure this out, you're pretty smart. So when I got that sense I was ak			
13		107				
14		107				
15		107				
16		107				
17		107				
18		107				
19		107				
20		107				
21		107				
22		107				
23		107				
24		107				
25		107				
26		107				
27		107				
28		107				

	A	B	C	D	E	F
1	Summary	ID	Quote	Type	Comment	
2	Hope that my partners' expertise will allow us to r	107	I had a vision for the company that led to forming it as an LLC with th	reaction		
3	Feel concerned that I was the only partner getting	107	we were getting some larger contracts and I was getting more concer	reaction		
4	Decide I probably need to unilaterally change fron	107	need to actually think about how this business was going to live into	reasoning		
5	Feel pleased that I can move past my anxiety abou	107	I've never done these things before as a small business person, but I	reaction		
6	Decide I can avoid legal counsel because I'm prett	107	I also didn't want to get legal counsel. ... I had worked with attorneys	reasoning		
7		107	And I need to get insurance and I didn't want the partners to be an impediment to the type of c			
8		107	I'm not a Donald Trump. I'm a nice guy. I said let's keep doing business, but since you're not pay			
9		107				
10		107	two people I'd asked to inform me ... I talked to my tax advisor who has worked with my tax situ			
11		107				
12		107	she said oh I think you can figure this out, you're pretty smart. So when I got that sense I was ak			
13		107				
14		107				
15		107				
16		107				
17		107				
18		107				
19		107				
20		107				
21		107				
22		107				
23		107				
24		107				
25		107				
26		107				
27		107				
28		107				



	A	B	C	D	E	F
1	Summary	ID	Quote	Type	Comment	
2	Hope that my partners' expertise will allow us to r	107	I had a vision for the company that led to forming it as an LLC with th	reaction		
3	Feel concerned that I was the only partner getting	107	we were getting some larger contracts and I was getting more conce	reaction		
4	Decide I probably need to unilaterally change from	107	need to actually think about how this business was going to live into	thinking		
5	Feel pleased that I can move past my anxiety abou	107	I've never done these things before as a small business person, but I	reaction		
6	Decide I can avoid legal counsel because I'm prett	107	I also didn't want to get legal counsel. ... I had worked with attorneys	thinking		
7	Realize that I need insurance and advice, as I get l	107	And I need to get insurance and I didn't want the partners to be an i	thinking		
8	Feel uncertain how I'm going to share with my par	107	I'm not a Donald Trump. I'm a nice guy. I said let's keep doing busine	reaction		
9	Ask my tax advisor what the tax differences woul	107	I talked to my tax advisor who has worked with my tax situations rea	thinking		
10		107	she said oh I think you can figure this out, you're pretty smart. So wh	reaction		
11		107	it was about being able to get ... a six figure contract for a small number of people so it was real			
12		107	it was also a sub-contract with one of the big Beltway bandits – SAIC. They have huge contracts			
13		107	I'm thinking of all my options. ... make sure I've got options a year from now			
14		107	I want to be sure that my tax situation a year from now was going to be comprehensive and po			
15		107	I had to figure all that out really quickly just getting this contract			
16		107	call the right people in and ask them each what [they] thought they could help me with.			
17		107				
18		107				
19		107				
20		107				
21		107				
22		107				
23		107				
24		107				
25		107				
26		107				
27		107				
28		107				

	A	B	C	D	E	F
1	Summary	ID	Quote	Type	Comment	
2	Hope that my partners' expertise will allow us to r	107	I had a vision for the company that led to forming it as an LLC with th	reaction		
3	Feel concerned that I was the only partner getting	107	we were getting some larger contracts and I was getting more conce	reaction		
4	Decide I probably need to unilaterally change fron	107	need to actually think about how this business was going to live into	thinking		
5	Feel pleased that I have a mode where I can move	107	I've never done these things before as a small business person, but I	reaction		
6	Decide I can avoid legal counsel because I'm prett	107	I also didn't want to get legal counsel. ... I had worked with attorneys	thinking		
7	Realize that I need insurance, as I get larger contra	107	And I need to get insurance and I didn't want the partners to be an i	thinking		
8	Feel uncertain how I'm going to share with my par	107	I'm not a Donald Trump. I'm a nice guy. I said let's keep doing busine	reaction		
9	Ask my tax advisor what the tax differences woul	107	I talked to my tax advisor who has worked with my tax situations reath	thinking		
10	Feel relieved that my tax advisor [felt my idea was	107	she said oh I think you can figure this out, you're pretty smart. So wh	reaction		
11	Feel excited about the chance to get a six figure, p	107	it was about being able to get ... a six figure contract for a small numl	reaction		
12		107	it was also a sub-contract with one of the big Beltway bandits – SAIC. They have huge contracts			
13		107	I'm thinking of all my options. ... make sure I've got options a year from now			
14	Make sure ...	107	I want to be sure that my tax situation a year from now was going to	thinking		
15	Feel pressure to ... think everything through	107	I had to figure all that out really quickly just getting this contract ... I h	reaction		
16		107	I needed insurance advice ... two people I'd asked to inform me ... call the right people in and as			
17		107	you certify to the government that that's what your business is. They could basically take everyt			
18		107	the prime contractor doesn't always like to help you. ...			
19		107				
20		107				
21		107				
22		107				
23		107				
24		107				
25		107				
26		107				
27		107				
28		107				

	A	B	C	D	E	F
1	Summary	ID	Quote	Type	Comment	
2	Hope that my partners' expertise will allow us to r	107	I had a vision for the company that led to forming it as an LLC with th	reaction		
3	Feel concerned that I was the only partner getting	107	we were getting some larger contracts and I was getting more conce	reaction		
4	Decide I probably need to unilaterally change fron	107	need to actually think about how this business was going to live into	thinking		
5	Feel pleased that I have a mode where I can move	107	I've never done these things before as a small business person, but I	reaction		
6	Decide I can avoid legal counsel because I'm prett	107	I also didn't want to get legal counsel. ... I had worked with attorneys	thinking		
7	Decide to get advice from the [professionals] I hav	107	I needed insurance advice ... two people I'd asked to inform me ... I t	thinking		
8	Realize that I need insurance, as I get larger contra	107	And I need to get insurance and I didn't want the partners to be an i	thinking		
9	Feel uncertain how I'm going to share with my par	107	I'm not a Donald Trump. I'm a nice guy. I said let's keep doing busine	reaction		
10	Ask my tax advisor what the tax differences woulc	107	I talked to my tax advisor who has worked with my tax situations reath	thinking		
11	Feel relieved that my tax advisor [felt my idea was	107	she said oh I think you can figure this out, you're pretty smart. So wh	reaction		
12	Feel excited about the chance to get a six figure, p	107	it was about being able to get ... a six figure contract for a small num	reaction		
13	Make sure I negotiate the contract so the beltway	107	it was also a sub-contract with one of the big Beltway bandits – SAIC.	thinking		
14	<more later>	107	I'm thinking of all my options. ... make sure I've got options a year from now ...			
15	Make sure I don't get into a situation where my pe	107	I want to be sure that my tax situation a year from now was going to	thinking		
16	Feel pressure to ... think everything through	107	I had to figure all that out really quickly just getting this contract ... I h	reaction		
17	Make sure I set everything up legally, correctly bec	107	I wanted to look very professional to them and not screw it up ... you	thinking		
18	<more later>	107	the prime contractor doesn't always like to help you. ...			
19		107				
20		107				
21		107				
22		107				
23		107				
24		107				
25		107				
26		107				
27		107				
28		107				





















team work: assignments & status

example: 4 team members, 10 hours a week

- assign each person a set of transcripts to comb & summarize
  - depends on their availability (average 7.5 hours/week or about two transcripts a week)
  - assign their own listening sessions or make recording & listener available
  - comb into separate list for each transcript
- track who is doing what, progress, when help is needed
- 30 minutes/day reviewing each other's combing (2.5 hrs/week)
- make sure each combing sheet gets reviewed



example: 1 sheet = 1 participant = 1 team member

Name ↑	Owner
 101 - Just Be Prepared 	Jennifer Rodgers
 102 - In a Few Months I Will Be Happy 	Lacey Gerard
 103 - Do Something about Being Accommodated 	Lacey Gerard
 104 - Lead the Charge and Challenge People 	Kunyi Mangalam
 105 - You're Not Untouchable 	me
 106 - Stronger, Tougher, Kinder 	Lad Decker
 107 - Think of a Black Octopus 	Lad Decker
 108 - You Teach What You Need to Learn 	Lad Decker
 109 - Idea Factory 	Kunyi Mangalam
 110- I wanna fight 	Jennifer Rodgers

# alternative: 1 tab = 1 participant = 1 team member

A	B	C	D	E	F
Summary	ID	Quote	Type	Reviewer Comments	Ye Olde Summary
Feel relieved to find the best psychiatrist who finally used the right prescriptions so I don't feel like I'm going to die or throw up every morning	007UD -BOS	for the past five or six years have the best psychiatrist I've ever had in my life who actually used the right medication... Cause people were putting me on things that my doctor even said I never should have been put on... Like never. Like stuff that he was like in shock about... I've woken up like I'm going to physically actually die and thrown up for almost my whole life until he got me on the right prescriptions.	reaction		
Feel overwhelmed when I have to fill out a form, to the point that I'm sick with my head on the counter, reaching for a Xanax or a Valium	007UD -BOS	I have issues with forms... Like I had to fill out an important form for the government and I was completely sick over it. I mean like sick with my head down, head on the counter, reaching for Xanax or a Valium. And feeling like I was gonna die. ... filling out forms can make me like so sick. And my doctor, that was another thing he said. He was like, well, it's gotta be done. Why can't, you know you just do a page at a time. A little bit at a time. Have somebody help you. And I was like, nobody can help me because these are questions I have to answer on my own.	reaction	CB: rearranged slightly	Feel overwhelmed and sick with my head on the counter, reaching for a xanax or a valium when I have to fill out forms
Feel frustrated with my irrational mental issues, like when changing a bookcase ends up with me crawling and puking into a basket because I don't know how to make it look the way I want it	007UD -BOS	I have a lot of mental issues. Like stupid irrational things. Like I had to change a bookcase and even though you could put stuff on a bookcase like a normal person, not like it and change it around, I was crawling and puking into a basket because I didn't know how to do it with it looking the way I wanted it.	reaction	CB: added a few more words to clarify	Feel frustrated with my irrational mental issues when changing a bookcase ends up me crawling and puking in a basket over how I can't get it how I like
Feel confident my surgeon is the best because even doctors around here know who he is	007UD -BOS	I did get the best surgeon... people everywhere, even doctors around here, knew who he was.	reasoning	IY: "Know" is a vague verb ... what's the thought process or the reaction here? (Probably a reaction ...)	Know my surgeon is the best because even doctors around here know who he is
Feel distressed to be in pain every day from my arms, my hands, my feet, my knees	007UD -BOS	I'm in pain every day... I do have tendonitis in both my wrists that will go down to my hand and like finger and thumb. My middle finger. And I have bad wear and tear on my knees and also some kinda arthritis that I don't remember the name of... I have neuropathy in my left foot. Which I'm not diabetic so that's weird. And I have plantar fasciitis. Then I have tendonitis on the side of the other foot... and I have like tennis elbow or something, which is ridiculous. I'm just in pain every day.. it's so annoying and horrible.	reaction		
Avoid tests for fibromyalgia because the tests for it are such a pain, it takes so long to diagnose, and some doctors don't even believe in it	007UD -BOS	Three doctors have said they believe that I have fibromyalgia also and that it does run in the family. Which my sister has it. I just haven't done all the tests for it because it's such a pain and they take so long to diagnose. And some doctors don't even believe in it.	reasoning		
Feel relieved to get my \$200 prescription for \$1.20 and not pay anything for doctor visits now that I have Medicare	007UD -BOS	I just had HealthPlan. And then ... in January I got the Medicare. And so Medicare pays like 80 percent and HealthPlan pays 20 percent... I don't pay for anything. Like doctor visits wise. Even x-rays, ultrasounds. Anything. And the most that they could charge me is 3.65 for a prescription... I just picked up prescription that I used to pay for like for \$200.00 and now I pay \$1.20 for it	reaction		

# highlight cells as we complete

	Nickname	Listener	Session Length	Gift Card	Recording	Transcript	Listen to Recording	Participant Description	Concepts & Summaries*	Combing Reviewed**	# Rows	Cultivate Patterns	Thinking Style Preparation
101	Creative Buzz	Indi - complete	1:48	arrived - Amazon egi	with transcriber	received	Lacey - complete	Indi - complete	Lacey - in progress				
102	Pattern Matcher	Rainy - complete	1:16	arrived - Visa egift	with transcriber	received	Elizabeth - assigned	Rainey - complete	Elizabeth - assigned				
103	Well-Prepared Steps	Indi - complete	2:04	arrived - Amazon egi	complete	received	Francesca - assigned	Indi - complete	Francesca - assigned				
104	Keep My Eyes Open	Rainey - complete	1:25	arrived - Amazon egi	complete	received	Lacey - complete	Rainey - complete	Lacey - complete	Eunju - complete			
105	Scientist at Heart	Sara, completed	1:53	arrived - Amazon egi	with transcriber	received	Gosia - assigned	Sara, complete	Gosia - assigned				
106	Freeze After 5	Indi - completed	1:27	arrived - Amazon egi	with transcriber	received							
107	The Secret	Rainey - Complete	1:34	arrived - Amazon egi	with transcriber	received	Bibiana - Complete	Rainey - Complete	Bibiana - Complete				
108	Determined Systematic Exp	Sara, completed	1:45	arrived - Amazon egi	complete	received	Francesca-complete	Sara, complete	Francesca - complete	Lacey - in progress			
109	<nickname>	Indi - reschedule											
110	Connect The Dots	Andrea - complet	1:59	arrived - Amazon egi	with transcriber	received	Bibiana - Complete		Bibiana - Complete	Eunju - complete			
111	Clean Answer	Andrea - complet	1:58	arrived - donation to	with transcriber	received	Andrea - assigned		Andrea - assigned				
112	<nickname>	Bibiana - postpone											
113	<nickname>	Sara, completed	2:36	arrived - Amazon egi	with transcriber			Sara, complete					
114	<nickname>	Bibiana- schedule											
115	<nickname>	Tafida - complete	1:54	arrived - Amazon egi	with transcriber			Tafida - complete					
116													
117													
118													
119	Losing the Game	Indi - completed	1:42	sent - Kiva egift	with transcriber	received							
120													
	<b>Status Values:</b> (you can improve these)	scheduling, scheduled, rescheduled, complete	1:47	ready, issues, sent, arrived	issues, downloaded, with transcriber, archived	in process, received, assigned	in progress, done	in progress, complete	assigned, in progress, in review, complete	assigned, in progress, complete		assigned, in progress, complete	assigned, in progress, ready
	green the cell background to signal Complete												

(later we marked these with thinking-style segment colors)

highlight cells as we complete

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1		Nickname	Listener	Gift Card	Recording	Transcript	Listen to Recording or Session	Proof Read Transcript*	Write Participant Description	Combing & Summaries	Combing Reviewed**	# Rows	Pattern Grouping	
2	101	Just Be Prepared	Indi	(recruiter sends)	uploaded to transcriber	received	Jenn - complete	(as you listen)	Jenn - complete	Jenn - complete	Indi & Lacey - complete	67	Indi - complete	
3	102	In a Few Months I'll Be Happy	Indi	(recruiter sends)	uploaded to transcriber	received	Lacey - complete	(as you listen)	Lacey - complete	Lacey - complete	Indi & Lad - complete	63	Lad - complete	
4	103	Do Something About Being Accomr	Indi	(recruiter sends)	uploaded to transcriber	received	Lacey - complete	(as you listen)	Lacey - complete	Lacey - complete	Indi - complete	63	Indi - complete	
5	104	Lead the Charge and Challenge Peo	Indi	(recruiter sends)	uploaded to transcriber	received	Kunyi - complete	(as you listen)	Kunyi - complete	Kunyi - complete	Indi - complete	47	Indi - complete	
6	105	You're Not Untouchable (It Can Ha	Indi	(recruiter sends)	uploaded to transcriber	received	Kunyi - complete	(as you listen)	Kunyi - complete	Kunyi - complete	Indi, Lacey, Lad - con	40	Lad - complete	
7	106	Stronger, Tougher, Kinder	Indi	(recruiter sends)	uploaded to transcriber	received	Lad - complete	(as you listen)	Lad - complete	Lad - complete	Indi - partial	29	Kunyi-complete	
8	107	Think of a Black Octopus	Indi	(recruiter sends)	uploaded to transcriber	received	Lad - complete	(as you listen)	Lad - complete	Lad - complete	Indi - partial	41	Kunyi-complete	
9	108	You Teach What You Need to Learn	Indi	(recruiter sends)	uploaded to transcriber	received	Lad - complete	(as you listen)	Lad - complete	Lad - complete	Indi, Lad - complete	42	Lad - complete	
10	109	Idea Factory	Indi	Jenn sent	uploaded to transcriber	received	Kunyi - complete	(as you listen)	Kunyi - complete	Kunyi - complete	Indi, Lad - in progress	58	Lad - complete	
11	110	I Wanna Fight	Indi	Indi sent	uploaded to transcriber	received	Jenn - complete	(as you listen)	Jenn-complete	Jenn - complete	Lacey & Lad - complete	47	Lad - complete	
12				<b>Status Values:</b>	uploaded to transcriber	submitted, received, uploaded				assigned, in progress, in review, complete	assigned, in progress, first pass complete, complete		assigned, in progress, complete	
13					green the cell background to signal Complete									
14		Pattern Grouping Colors for Spreadsheet			Turn the cell color above green when each step is complete.				* Doesn't have to be perfect. Just fix the glaring things. ** We will not necessarily be able to review every row, since they will get reviewed by the grouping					
15			Indi	green	1. make a copy of the master spreadsheet prior to working on it.									
16			Lad	blue	2. when you add a row to the master, in the combing sheet, turn the rest of the row your personal cell color.									
17			Kunyi	dark magenta	3. in the Excel master grouping spreadsheet, turn the font of the rows you add your personal font color.									
18			Lacey	purple	4. make sure you paste in the right column of the master									
19			Jenn		If you review anyone's combing and want to turn the summary cell a color to say you approve, use your signature color to the left.									



combing your own listening sessions:

- you **understand the tone of voice** of what was said because you were there
- you are **blind to the assumptions** you made

if a team member combs your listening sessions:

- **add the tone of voice** to the transcript for them, ask them to **listen to the recording first**, and be available for questions

here's an alternative method:

- gather concepts **from your own transcript** (where you were the Listener)
- ask a **team member to write the summaries**
- **review** their summaries

team work: review summaries



# how to review summaries:

review the concepts first if your team is new at this!

## 1. check the summary:

- a) does the summary **make sense at first glance**, without any background or context?
- b) does the summary **follow the rules**? (first person, present tense throughout, clear, concise, follows the formula)
- c) is the summary **already represented in another row**; should this be **merged** there?
- d) is the summary **a hodge-podge**? split the concept? (**see below**)

## 2. check the concept: (this is low priority if you're in a hurry, assuming your team is skilled at finding concepts)

- a) is it actually a couple of different concepts; should it be **split into separate rows**?
- b) does it contain something that actually **belongs with a quote on another row**?
- c) if it's a mess, can it be **pruned back** to reveal its clear meaning?

individuals work on their own,  
plus 30 min per person review

... splitting, merging, pruning  
... tweaking the summary

chatting about the meaning  
spoken  
written  
comic panels



teams across time zones

... leaving comments about what you did or suggest doing  
... or feel confused or ambivalent about

asynchronous “chatting” about the meaning



© timeanddate.com 2019

# asynchronous comments need to be clear (for example ...)

	A	B	C	D	E
1	Summary	ID	Quote	Type	Comments
22	Construe my choice of a Starbucks located near the NYPD headquarters as a sign that I should join the police	105	And the funny thing was was that the Starbucks that I would walk to, I didn't even realize was right next to the NYPD headquarters. So, that was like kind of like a sign for me too. Because it was the nicest Starbucks that you could literally sit down and relax in. I didn't realize until the second day. I was like, why are there so many cop cars around. And I'm like, oh that's why.	Reasoning	IY: Construe! How did you find that verb?! LOL! LG: What about "feel satisfied" or "feel pleased" or "feel amused" KM: Is there something wrong with "construe"... it's like when someone takes somethinga as a sign... they construe it as such. Is "interpret" better for you guys?
14	Feel relieved to finally find a doctor who can give me an answer, and tells me, "You have this with this, and this is how we're going to treat it"	001UD-BOS	I was looking up symptoms online, and I found my specialist doctor...she did all these tests, and other hospitals had done tests before but they couldn't find anything. She went, "Oh yeah, absolutely." She was like, "You have this with this, and this is how we're going to treat it."	reaction	RD: enough to infer relief? CB: Yeah, that sounds right

# it helps to keep the old summary

	A	B	C	D	F	G
1	Summary	ID	Quote	Type	Comments	Ye Olde Summary
19	Feel grateful to my mentor for pointing out volunteer opportunities and coaching me how to move along the pathway I want	103	a lot of them also kind of mentored me and let me know what I should be doing and seeing volunteer opportunities...So, she mentored me. She took me on to allow me to volunteer and kind of coached me as to what I should be doing to get to the pathway that I wanted to.	reaction	IY: Um ... isn't this about feeling grateful to a mentor? Maybe??	Seek out volunteer opportunities after being coached to do so because, according to my mentors, it will help me get on the path I want to be on
20	Feel grateful for our small community because I already had built connections with the director of the Disability Center, where I applied for a job	103	<del>I knew them because I used to attend those colleges and kind of connected with them for different reasons. It's sort of such a small community. The Director of the Disability Center at College of San Mateo actually used to work at the career center and I used to use the career center to reach out to them to post jobs for caregiving for myself. So, she actually ended up being in the disability center and so I knew her and that's how I kind of had that connection.</del>	reaction	IY: Explanation.	
21	Feel insecure about interviewers not giving me equal job opportunity, as if I have to prove 110% that my disability will not hinder my ability to be a good employee	103	I often feel like I have to give 110%. I always feel like I want to show in interviews that my disability does not in any way hinder my ability to succeed and be a good employee. Of course, we have equal opportunity employment, but ... I tried it for 3 months. It was a good fit and then I became the manager for 4 years. It just shows like all the struggles I've faced just to get where I want to be or need to be, and I have to prove myself.	reaction		Give 110% because I want to show my disability does not in any way hinder my ability to succeed
22	Feel insecure and discouraged when I don't get the job after the second interview	103		reaction	IY: Same as the one above. Moved the quote up there.	
23	Internalize the idea that I've been discriminated against because of my disability, becoming passive aggressive, because I can't prove otherwise	103	you can never prove it's discrimination. ... So, I think part of it is I start to internalize that and think it's because of my disability....So, when I didn't get it then I was like oh, it's probably because of my disability. ... you know I was in my 20s. I took things personal. ... I was maybe a little passive aggressive. Like I'd say okay, but then just get really upset about it and talk crap.	reasoning	IY: Wonder is a good verb for the quote two rows down. Here I'll change the verb.	Wonder if I am rejected by jobs because I have a disability
24	Feel excited when I get called back for a second interview because it means they want me	103	So, when I get second interviews I become hopeful and ...I was just like excited. I was like, oh wow. For me to get called back for a second interview, that like means they want me...I was excited all the time when I got it,	reaction		
25	Wonder if they have called me back for a second interview so they can reach their quota of people needed for a second round of interviews	103	maybe that they call me back because they have to have a certain quota of second interviews and I'm one of them.	reasoning		

# ye olde summary

	A	B	C	D	E	F
1	Summary	ID	Quote	Type	Comments	Ye Olde Summary
28	Feel pressured to commit to class project because dropping out will disappoint my team, even though I won't be able to travel to present it as I have kids	109	I said, "Well, I'm not interested because I have children and I won't ever be able to travel around and do this." They said, "Okay, well, that's disappointing because we really want to do this." I felt bad for them. So, I said, "Okay, well I'll still help you." ...Yeah, it was me feeling guilty about not – stopping other people.	Reaction	LD: she didn't want to stop the other people from succeeding; feel pressured to commit to class project LD: she recognized that this ended up being a good thing even though she did it because of guilt pressure	Decide to stay in a class project because dropping out will disappoint my team, even though I won't be able to travel to present it as I have kids
29	Feel gratified that our class project offers a great combination of both business goals and people needs	109	But our solution was pretty – I felt like it was quite interesting because my team was very – I had some very business-minded people on the team and I am a highly empathic, probably overwhelming human centered person who cares very much about the humans, especially children, because I have children. So, it was a great combination because we kind of felt like we met the need between business and humans and caring.	Reaction	LD: she appreciates her opportunity	
30	Bet on impossible things working out yet again when agreeing to support team's choice to compete in Shanghai even though I don't own a passport and never travel	109	But they had all been all over the place and led kind of cosmopolitan lives. They said, "Well, I've never been to Shanghai. Let's apply for Shanghai." At that point, I had already gone along enough times with what was existing and seen it be successful that I said, "Okay, sure," thinking, "I literally do not own a passport and never have had one, I've never traveled anywhere other than to Western New York as a traveler, and I have no idea how I'm going to afford to do that." So, okay. Right?...But I've done that twice already and I've made it. So, let's figure it out....I think that the sense that I am with people who understand that there are ways that we can make this work and who know that they can travel, and the travel will be fine and I'm – I mean I guess I could succeed in going to China. It seemed so impossible, at that time, that I just was like, "Sure, okay."	Reasoning	LD: bet on things working out again	Support my team's choice to compete in Shanghai even though I don't own a passport and never travel, since I feel like I've agreed to the impossible twice before and it worked out
31	Believe I should have faith that other people can help me find solutions to my problem if I don't have one, like when my friend described that a university will pay students to do their doctorate	109	it's just having faith that there are answers that I don't have. There are – other people do this, and I don't. So, I'm with a group of people who know more about travel than I do, who know more about competing for educational things than I do. One of my teammates had a master's degree that she got in Berlin that was completely paid for. I said, "I had no idea that that even existed. I didn't know that you got paid to go to school." I had no clue. I just assumed that anyone that went on for post-grad – or like post –well, for graduate studies, was rich. I didn't know that a PhD student is essentially paid to be one.	Guiding principle	KM: I can't get a handle on this one. Help! LD: I think it's a GP. updating	Have faith that other people can help find solutions to my problem if I don't have one, like when my friend described that a university will pay students to do their doctorate
	<del>Agree to travel to China because it seems so</del>	109		Reasoning	LD: Combined with row 30	

# highlight calls attention to comments

	A	B	C	D	E	F
1	Summary	ID	Quote	Type	Reviewer Comments	Ye Olde Summary
9	Decide not to shop in stores without electric carts because it's difficult to manage a carriage and a walker at the same time	004UD-BOS	when I'm going to any of the stores that don't have the electric carts, I have to use my walker... I can go in the stores that have electric carts. I can grocery shop... Stores like the department stores like Macy's, they don't have anything like that. I just don't shop in those stores... I could go in with the walker, but it's just difficult to manage that and a carriage at the same time.	reasoning	CB: tweaked a little to emphasize that he's avoiding situations that don't work for him	Decide to shop where they have electric carts because it's difficult to manage a carriage and a walker
10	Keep a walker that has a seat on it in the car for when I go out so I don't bring germs in the house, and so I can sit if I get tired	004UD-BOS	I have a walker that I leave in my car ... I just don't want to bring germs in the house... So I have one that I leave in the back seat of my car that I have with me all the time. ... for when I go out, I bought one that has the seat on it, so if I get tired, I can sit.	reasoning	IY: Untangled it.	Keep a second walker in the car for when I go out so I don't bring germs in the house
11	Put felt on a second walker that I keep in the house so it doesn't scratch the floors	004UD-BOS	and then I have a walker in the house. ... I got a second one and put felt on it, so it doesn't scratch the rugs and the floors and everything. ... The doctor gave me the one that I use in the house	reasoning		Choose the walker with a seat on it for when I go out, so I can sit if I get tired
12	Work hard to exercise even though it's a nightmare with all my injuries, because without that activity my weight loss stops	004UD-BOS	sometimes I'm just in bed for several days to a week. So that makes it difficult. When I'm not able to get the exercise, of course the weight loss either stops or I go up a pound or two, because I've been laying in bed for a week. But it's just kind of cutting down on carbs and trying to get to do the exercises, because that's the only thing that's going to take it off for me is reducing the food intake and increasing activity... It's hard work, especially being a larger person. It's very difficult exercising with all my injuries and it's just a nightmare sometimes. Most of the time.	reasoning		
13	Shop on days my son is home from work so he can take the stuff up the stairs for me	004UD-BOS	when I get home, my son, usually, I make sure I shop the days he's home from work. And he'll take the stuff up the stairs for me.	reasoning		
14	Feel motivated to do normal things by the fear of becoming one of those people who never goes out of the house and weighs 600 pounds	004UD-BOS	I want to be able to feel like I can do something. I don't want to just sit in my house the rest of my life. So I try to get out and do the normal things and just have to have a little bit of extra help some days... I don't want to be one of those people that ends up on my 600-pound life and the haven't gone out of the house in 10 years.	reaction	CB: Tried to keep same idea while adding details from quote  IY: "Want" is not a verb you can use.	Feel capable by going out and doing normal things like grocery shopping  Want to feel capable so I try to get out and do the normal things with a little bit of extra help, because I don't want to just sit in my house the rest of my life
	Think ahead about how I will carry purchases with my walker or whether one of the people from the store can put it in my car so my son	004UD-BOS	if I buy something that...I can't sit in my lap ...or sit on the walker and bring it out to the car, if it's bigger than that, I can't do it unless I can have one of the people from the store put it in my car and then my son will get	reasoning	CB: Added details to make it clearer what the obstacles are	Think ahead about how I will carry purchases and where I'll need help to get them home

# decision not to split out a concept

			starting to schedule all these appointments for me and I'm like on my gosh, it's real. It could actually happen.		
11	Worry that my surgery will not happen on schedule because I missed an appointment	102	But you need the months consecutively and I missed an appointment. So, I had to go to another appointment and then that set aside my requirements....I got a call saying I was approved for surgery, maybe at the end of May. They extended it because I did miss an appointment. So, at the end of May they told me I was approved and I really could have surgery as early as like June or July.	Reasoning	<p>But feel grateful that my surgery was approved despite the fact that I missed an appointment</p> <p>IY: I like having the worry there. Do you think it's strong enough to split out the "feel grateful" to another row? LG: Nah, she doesn't go too much into that, so I'll leave it be.</p> <p>LD: She's feeling anxiety about her commitment, worried that it won't happen after all because of her possible mistakes... still before full commitment and change; worry that I'll sabotage myself</p>
12	Hurry to lose weight so that I meet the pre-surgery qualifications because I was not convinced I would get approved and I didn't want to do all that work only to be denied	102	I hadn't met my weight. Honestly, I hadn't done anything because I wasn't convinced. And once they told me, okay it's approved, they gave me a date of June 22nd. That was my preop appointment. At my preop appointment I needed to lose weight. I was 322 pounds and I needed to be...I had literally one month to lose the weight I needed to lose in order to have surgery....	Reasoning	<p>IY: Nice! This is really the reasoning! Good one.</p> <p>LD: Get my ass in gear, Get to the next step, Convince myself to keep going, Fear wasting all my efforts,</p>
	Follow all the directions the doctor gives me to lose weight so that they see I am trying and I am committed	102	I just went crazy. I started following all of their directions. I did everything. And actually, when you're so overweight you do lose weight pretty	Reasoning	LD: Show my commitment, Follow the path, Show others I'm committed



# discussion to help fathom the meaning

	A	B	C	D	E	F
1	Summary	ID	Quote	Type	Comments	Ye Olde Summary
29	Anticipate learning about myself by climbing the blessed mountain Taishen, since there must be something to doing what Chinese people have done for thousands of years	104	this is the experience. This is where we're going to learn about ourselves. This is where we're going to learn about ourselves in this context. And if they've been doing it for thousands of years can't hurt us. We can probably get something out of this!	Reasoning	IY: Reasonable. ;) It's so hard to know what she really thinks under that tough-girl exterior.	
30	Feel awe at the pure translational moment of generosity when a Chinese man used Google translate to help us find food and shelter and was so friendly	104	We were using Google Translate in 2011 on a Blackberry to ask where can we sleep? What food? Things like that. And it was like one of those really pure translational moments of just people helping people who like literally have no idea what's happening. This man got our email address and took photos of us. He was like typing in some Google Translate on my phone and then we realized we can't talk back really. It's a one way thing, but it was helpful. It just was one of those moments I'm never going to forget where it was like oh, we are doing the Asian thing. We are doing the Chinese thing right now.	Reaction	KM: unsure about including the word "translational"-- I think it means a moment of connection, but she didn't say that  IY: Dunno either, don't remember it, but it works here. Google translate. Am adding that detail and taking away the "no idea what was happening" because it makes no sense when read from the outside, not knowing context. You don't have to use more than three or four of her words. :)	Feel awe at the pure translational moment that Chinese people helped us find food and shelter when they saw we had no idea what was happening

# humor is helpful

	A	B	C	D	E	F
1	Summary	ID	Quote	Type	Comments	Ye Olde Summary
33	Share my experiences discovering my cultural identity with my Grandmother, who encouraged me to ride the train with the chickens, do the flavorful cultural things not just the five star hotels she was forced to stay in	104	But I was writing her. I was like, here's what we're doing and then I would tell her about these experiences. (sorry, little emotional. I was afraid for that to happen.) She was like I'm so glad you get to go back and see because I really wasn't able to in the way that you are. She would go with my grandfather and go visit, but they were very well off and she always wanted one of these adventures and never got to do it because she was forced to stay in the 5-star hotels. But her spirit wanted to go out. She always said, "do the train ride with the chickens once, just so you get the flavor of it." "Do this once, to get the flavor." So, we're telling her about all these flavors we're experiencing and again, this like cultural identity process, and she was like "just prove them wrong."	Reasoning	IY: Tweaked it a bit. Chickens, you know. Heh.	Share all my experiences of discovering my cultural identity with my Grandmother, because though she travelled, she was never able to have adventures the way I am

a project timeline

depending on the richness & length of the transcript ...

- it takes 3–6 hours to comb each transcript (depending on richness and length)
  - 8–10 hours for combing + cultivating patterns
- yields 40–60 concepts on average
  - 60–100 for transcripts rich with concepts
  - transcripts without a lot of depth or which don't explore a person's purpose yield 4–16 concepts
  - (possibly depends on language & cultural habits)

# 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

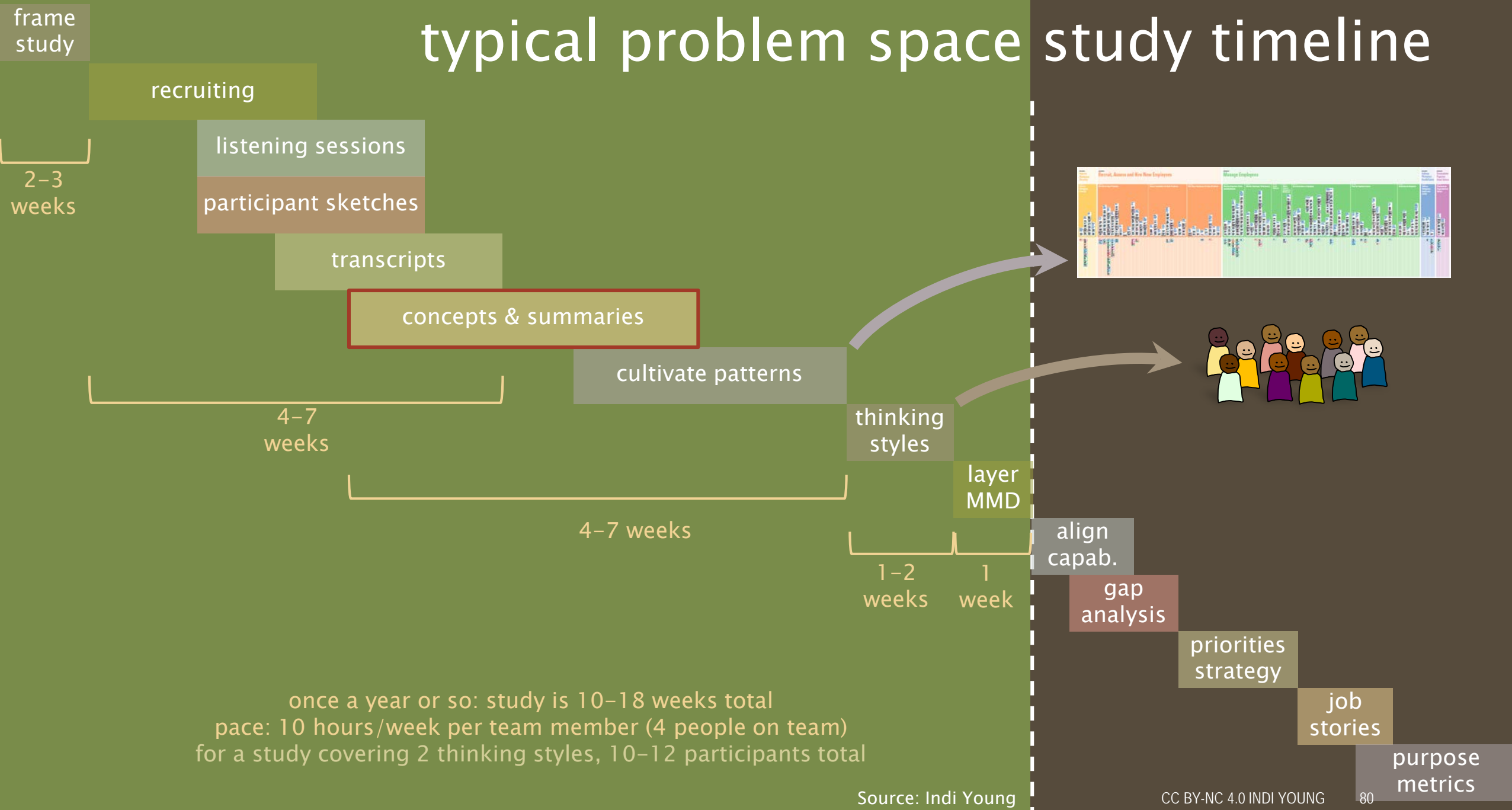
job stories

purpose metrics

this course



# typical problem space study timeline



lightning-quick and from-memory

three different approaches to  
concepts & summaries:

1. complete-combing
2. lightning-quick
3. from-memory




## three different approaches to concepts & summaries:

1. complete-combing
2. lightning-quick
3. from-memory

what we have covered in this course  
← ... for each speaker's transcript, you pull quotes to make a list of concepts and then write a summary for each of them

three different approaches to  
concepts & summaries:

1. complete-combing
2. lightning-quick 
3. from-memory

## 2. lightning-quick

same as what we have covered in this course

requires:

a **synchronous** team

**intensive collaboration**

skills: concept-finding, summary-writing

# lightning-quick combing

1. designate roles:
  - a) TR: a transcript-reader who is skilled at finding concepts
  - b) S1, S2, S3: designate a few people who are skilled at summaries
  
2. TR reads silently until a concept pings their radar:
  - a) TR reads aloud the quote containing a concept, and says the type (optional)
  - b) S1 accepts this concept:
    - i. writes the type & brainstorms some verbs or emotions
    - ii. writes a summary, following the formula
  
3. TR **does not pause reading**:
  - a) TR reads aloud the next quote containing a concept, and says the type (optional)
  - b) S2 accepts this concept:
    - i. writes the type & brainstorms some verbs or emotions
    - ii. writes a summary, following the formula

# lightning-quick combing

## 4. TR does not pause reading:

- a) TR reads aloud the next quote containing a concept, and says the type (optional)
- b) S3 accepts this concept:
  - i. writes the type & brainstorms some verbs or emotions
  - ii. writes a summary, following the formula

## 5. TR does not pause reading:

- a) TR reads aloud the next quote containing a concept, and says the type (optional)
- b) S1 accepts this concept:
  - i. writes the type & brainstorms some verbs or emotions
  - ii. writes a summary, following the formula

... and so on ...

# lightning-quick combing

(TR) will encounter repeated, implied, and tangled concepts, which requires a bit of **instruction to the S# who recorded the summary**:

**repeated**: “this one goes with [*such-and-such description*] ... [might give supporting detail]”

**tangled**: “I think this is [number of] concepts [*list of the separate verbs or feel+emotions*]”

**implied**: “mark this as implied; I think it’s [*verb or feel+emotion*]”

for the next transcript, **change roles so the TR gets a rest** if they want

1. designate roles: ...

...

	Summary	ID	Type
1	<b>Feel angry</b> that the airline says it offers DIRECTV but the details read that only three movies are available a mile off shore, and the flight attendant tells me to call DIRECTV when I have complain that I have been ripped off	808	emotional reaction
26	<b>Feel upset</b> that we took off two hours late because we lost a big chunk of the day and we still have to go through customs	808	emotional reaction
27	<b>Feel uncomfortable</b> because the air temperature on my flight goes back and forth from hot to cold and have to keep taking my jacket on and off	808	emotional reaction
28	<b>Suspect</b> the flight attendant is too lazy to ask the pilot to change the air temperature when I ask if there's something she can do	808	inner thinking
29	<b>Feel frantic</b> about my son, who is crying hysterically in pain with the pressure on his ears during the landing, because sipping water isn't relieving it, and he is too young to understand me telling him to swallow	808	emotional reaction
30	<b>Feel aggravated</b> that none of the flight attendants offer any help to make my son more comfortable, who is screaming in pain	808	emotional reaction

yes, do this digitally instead of sticky notes, for efficiency



one person is reader, who reads aloud concepts

one team member scribbles down summary while reader continues to next concept

(second stage) group the sticky note summaries as you go





## lightning-quick combing

- takes 3–10 days together (about half the amount of time as complete-combing)
- can be done remotely; time zones may interfere with # hours together per day
- very intensive—bring lots of sustenance
- you might get tired of each other
- might need a break to take care of other work

# lightning-quick combing

## drawbacks:

- captures ~50–75% of the concepts
- not perfect about tangled concepts
- single/temporary use—can't add on to it easily without the quotes associated with the summaries
- for ideation & strategy, not metrics

three different approaches to  
concepts & summaries:

1. complete-combing
2. lightning-quick
3. from-memory ←

### 3. from-memory

subject to bias!

requires:

awareness & discipline to capture concepts  
that are outside of your own thinking  
does not require transcripts

# from-memory combing

immediately after the listening session:

- write as many summaries as you can think of for concepts you can remember (bias here!)
- make yourself do this for minimum 15 minutes
- if you have a team, compare and combine your summaries

or while listening to the recording:

- stop the recording to write summaries as concepts come up

# from-memory combing

source:

live or recorded listening session

(no written record)

shaves off a couple of weeks

ID	Nickname	Reasoning/Thinking	Reactions	Guiding Principles
103	The Whole Kitchen Sink Thrown at Me	<p>Decide it's time to get rolling on a degree/career because I just turned 39</p> <p>Reach out to state representative and governor about changing the VA grants deadline</p> <p>Figure out which degree might cost me less because of my EMT background</p> <p>Contemplate whether to reinstate my EMT registry so I can get an xray tech job, but it's too much physical</p> <p>Work on controlling my pain levels without meds because I'm allergic to pain meds</p> <p>Avoid making the mistake my husband made getting a degree in something that won't make enough money for us</p> <p>Promise my grandmother that her sickness wouldn't stop me finishing my degree</p> <p>Try to find something I love to do and find a career to match, like the trama and adrenaline of going on an EMT run and washing brains off my shirt afterward</p> <p>Look for opportunity to go in to class because kids are all in school now and I can't do online because they will disrupt</p> <p>Talk to the loan officer in Louisville about a small business loan</p>	<p>Feel proud of my grandmother when she got a degree at 40 and became a nurse, while raising six kids</p> <p>Feel surprised to see myself in a photo from the past two years and not even remember being there</p> <p>Hope that there is a path to working at home, even though I haven't found it yet</p> <p>Feel disappointed that two women in my life who were given jobs to work from home are monitored the whole time and that means I wouldn't be able to get up and walk around from my pain</p> <p>Hope there's a job I can do maybe from sitting on my heated mattress pad</p> <p>Feel disappointed that the small business loans are only given for certain types of businesses now</p>	<p>Trust in God about what will happen to me; it's the only way I get through this</p> <p>Make sure it's affordable</p> <p>Show my sons that it's never too late to go to school</p> <p>Distrust statistics because it doesn't show the whole person, all the things combined</p> <p>Fight to stay alive rather than actually live these past two years</p>
104	Hunting Fish with a Bow	<p>Help others understand their disease better so they can have a healthier life.</p> <p>Communicate real practices, like bringing a measuring cup to measure carbs, to the brother for more effectively managing the disease.</p> <p>Look for schools that have an archery program so that maybe I can get an archery scholarship</p> <p>Join the invited students on a tour of a college campus so that I could see what it looked like</p> <p>Aim for a school where everyone is friendly and studying is not a stressor</p>	<p>Feel terrified at the thought of brother going to hospital because of too much snacking and losing his life</p> <p>Feel energetic enough to run a marathon without passing out when I am at the right sugar level</p> <p>Feel unwilling to do anything when I have sugar that's too high, making me lay around and sleep</p> <p>Feel amazed at how much better I feel when I finally understand the sugars levels from the nurse practitioner</p>	<p>Better the lives of people struggling (with diabetes)</p> <p>Measure my sugar level constantly</p>

	A	B	C	D	E
1	ID	Nickname	Reasoning	Emotions	Guiding Principles
8	412	Chihuahua lady	<ul style="list-style-type: none"> <li>- Choose United to maximize miles</li> <li>- Choose based on schedule rather than worry about price</li> <li>- Look for last minute flights on other sites but usually book with United</li> <li>- Use trip advisor reviews for arranging hotels when traveling internationally and Expedia star rating for domestic</li> <li>- Avoid flying on Polish airlines because of rude flight attendants</li> <li>- Help family all get back to Europe for annual trip by using my miles</li> <li>- Avoid changing a flight on a vacation because fees are too expensive</li> </ul>	<ul style="list-style-type: none"> <li>- Feel frustrated by instances of poor customer service, longer Elite lines and lack of Economy Plus on subCO planes</li> <li>- Feel pleased with extra information provided on onboard videos</li> <li>- Feel annoyed by extra questions about children traveling with me that take more time while checking into Continental flights</li> <li>- Distrust star ratings for hotels in Europe because quality is measured differently</li> </ul>	<ul style="list-style-type: none"> <li>- Go with what is happening because I usually don't like to complain</li> <li>- Always provide extra information to help people</li> <li>- Avoid fees; pay as little as possible</li> </ul>
9	413	Lucky Irish Lady	<ul style="list-style-type: none"> <li>- Check and compare flights on Kayak then books on the airline</li> <li>- Call to get First Class when web site didn't work</li> <li>- Travel to Ireland frequently</li> <li>- Book with money one way and with miles on the return</li> <li>- Book separate tickets on separate airlines</li> <li>- Fly on United, Continental and Delta</li> <li>- Book way ahead for definite vacations</li> <li>- Get to airport 2 hours early</li> <li>- Bring a carry on in the case of multiple connections</li> <li>- Book nonstops when possible</li> <li>- Go somewhere very unusual on my vacations</li> </ul>	<ul style="list-style-type: none"> <li>- Feel unruffled when things go wrong</li> <li>- Feel surprised to get benefits even when things go wrong</li> <li>- Enjoy traveling alone especially when its to special destinations</li> <li>- Feel happy I make the flight anyway</li> </ul>	<ul style="list-style-type: none"> <li>- Roll with the flow because "that's just part and parcel of traveling. I'm happy that I make the flight anyway"</li> <li>- Avoid connections to ensure baggage stays with you</li> </ul>
	414	I love exotic vacations	<ul style="list-style-type: none"> <li>- Call to book flights on united after viewing on Continental.com</li> <li>- Pay close attention to the reviews for places I plan to visit</li> <li>- Validate the claims from reviews I have read</li> <li>- Work with travel agents in the location where I am</li> </ul>	<ul style="list-style-type: none"> <li>- Feel proud by saving money on trips to exotic locations; Save money on the location of my trip ???</li> <li>- Feel excited to see exotic locations</li> <li>- Enjoy researching my trips because I like envisioning myself there</li> </ul>	<ul style="list-style-type: none"> <li>- Trust my friends' advice and experience</li> </ul>



yes, you can use sticky notes for the summaries



## from-memory combing

### drawbacks:

- captures ~15–33% of the concepts
- not perfect about tangled concepts
- not perfect about implied concepts
- single/temporary use—can't add on to it easily without the quotes associated with the summaries
- for ideation & strategy, not metrics

# summary

	complete	lightning quick	from memory
concepts captured (novice–expert)	90%–98%	50%–75%	15%–33%
concepts untangled	complete	partial	partial
contains quotes	✓	✗	✗
easy to add more study data in future	✓	✗	✗
material for scenarios & metrics	✓	✗	✗
# weeks (10–12 participants)	10–18	4–7	4–7

based on listening sessions & rich transcripts

# summary

	complete	lightning quick	from memory
concepts captured	uses the proper data synthesis technique, as a group going really fast, for 3 hours a day	50%–75%	15%–33%
concepts untangled			
contains quotes	✓		
easy to add more study data in future	✓	x	x
material for scenarios & metrics	✓	x	x
# weeks (10–12 participants)	10–18	4–7	4–7

RISK: what you remember after a listening session can unconsciously represent what's important to you, not what's important to the participant

based on listening sessions & rich transcripts

next course: cultivating patterns from summaries

	1	Mental Space	Tower	Summary	ID	Quote
+	2	Consider the idea of going to college				
-	13	Feel determined to be there for (support) my family				
-	14		Feel determined to do my share and support my family			
·	15		Feel determined to support my husband thro	103	And so he came out of the military with PTSD.	
·	16		Feel determined to push my way through har	103	I'm pretty strong, so I push my way a lot of tim	
·	17		Feel blessed by God that I have a very good h	103	He is very, very, very good. God has really, trul	
-	18		Give my kid a better education than I got			
·	19		Feel determined to give my kid a better educa	101	I mean and they just, they always seemed to h	
·	20		Idolize my aunt for giving her kids lots of one	101	My aunt. She home schooled all three of her k	
·	21		Feel amazed by the ease with which my cousi	101	they just seemed to know everything that Mira	
·	22		Consider starting a daycare in order to home	101	I thought about running my own daycare from	
·	23		Believe that my young children come first and	103	As well as with the children and them being so	
-	24		Feel disappointed that I can't support my family as I intended			
·	25		Feel disappointed that I can't take care of mys	101	I've got one kid but I've got two girls that I wen	
·	26		Feel grateful that my family lets me live here	101	I lost...My apartment in the divorce, so. God [b	
-	27		Feel motivated to get the ball rolling because of my age, health			
·	28		Feel motivated to get the ball rolling with sch	103	Well, I finally got all of them in school. So, my l	
·	29		Decide to go back to school because it hit me	107	that was a big, kind of a big year. The year that	
-	30		Resolve to make my kids proud of me			
·	31		Yearn for my kids to be proud of me like I am	103	to be able to provide some more income again	
·	32		Resolve not to be like my mom who never rec	101	It comes from my childhood. When my parent	
·	33		Feel perturbed that my daughter sounds like	106	Yeah, when she had me talking about...Mom	
-	34		Feel determined to keep my job and income while going to classes so I can support my family			
·	35		Make sure I can still provide for myself and m	105	it was like more convenient with me with work	
·	36		Look into programs where I can continue to w	106	I can't take time off work to, you know, go to s	
·	37		Feel serious about being financially responsib	107	I rely on, I rely on my family, ah, and I, I feel lik	
-	38		Budget closely so I know where I can move money around when I need it			
·	39		Justify counting pennies for my budgets beca	107	I plan, I try to plan my financial, my money, my	

recap



Threads

All DMs

Mentions & reactions

Saved items

More

Channels

# 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

## #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



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?

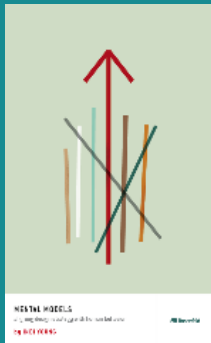
so that we can separate the steps of analysis:

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)

feedback for Indi:

<https://goo.gl/forms/6CvKjFk9VZjuRK5I1>

Rosenfeld Media  
all-books discount:



DISAPPOINTEDFALCON20



Audible  
version

- Archived courses
- Coaching (individual or team)
- Empathy Among Team Members (workshop)
- Persuading Stakeholders (medium.com/inclusive-software)

sign up for the newsletter ...

indi in your inbox



@indiyoung



indiyoung



indiyoung

news

Tue 18-Feb-20 11:03 AM

The New York Times <nytdirect@nytimes.com>

The Privacy Project: All this dystopia, and for what?



By **Charlie Warzel**  
Opinion writer at large

In the year I've been writing this column, and voraciously reading articles about digital privacy, an unsettling theme has emerged ...

Then, upon further examination, the claims regarding the technology break down. That groundbreaking piece of technology, it turns out, is deeply flawed. Instead of a perfect panopticon, you have a surveillance-state equivalent of a lemon, or worse yet, total snake oil.

The examples are everywhere. Software intended to scan social media posts of job candidates for background checks sounds like a creepy way to judge candidates — but, as [examples show](#), the software seems unable to recognize and appropriately categorize common human traits like sarcasm or humor, rendering the software mostly useless.


*“But while supervised Deep Learning [for algorithms] excels at perceptual tasks, there are two major challenges to the next quantum leap in AI: (1) getting DL systems to learn tasks without requiring large amounts of human-labeled data; (2) getting them to learn **to reason and to act.**”*

*Yann LeCun, VP & Chief AI Scientist at Facebook,  
Turing Laureate, 11-July 2019 ACM Tech Talk description*

## bright applications

- medical image reading
- information filtering & ranking
- assisted + networked driving
- system modeling in physics, astrophysics, biology

emphasis on algorithms,  
dearth of research on  
supporting what people  
are trying to accomplish



tendency to avoid doing the  
laborious work that actually  
helps people understand people

## dark consequences

- social media hate speech propagation
- video suggestions unwanted by viewer
- facial recognition failure for people not young, light, male, unmasked



*“There are AI products that are used to mine through conversations, looking for patterns. For now, this is mainly being applied to Sales with fantastic results.*

*Listening Sessions: I think it wouldn't take much effort to see if the 8-10 hours of data analysis per 1 hour of conversation could be massively streamlined.”*

shortcutting the actual goodness of developing empathy

... like having someone else eat your food for you