What? | How? | Why?

concrete ⟷ emotional

WHAT (what are they doing in the photo?)	HOW (how are they doing it?)	WHY (why are they doing it this way? Take a guess!)
-little girl picking root vegetables	-she's smiling, even though it looks bigger than her, it looks fun	-somehow it's been made into a game...gardening is fun...getting messy is fun to her?

WHY use What? | How? | Why?

What? | How? | Why? is a tool that can help you drive to deeper levels of observation. This simple scaffolding allows you to move from concrete observations of a particular situation to the more abstract emotions and motives that are at play in that situation. This is a particularly powerful technique to leverage when analyzing photos that your team has taken into the field, both for synthesis purposes, and to direct your team to future areas of needfinding.

HOW to use What? | How? | Why?

Set-up: Divide a sheet into three sections: What?, How?, and Why?

Start with concrete observations (What):
What is the person you're observing doing in a particular situation or photograph? Notice and write down the details. Try to be objective and don't make assumptions in this first part.

Move to understanding (How):
How is the person you're observing doing what they are doing? Does it require effort? Do they appear rushed? Pained? Does the activity or situation appear to be impacting the user's state of being either positively or negatively? Use descriptive phrases packed with adjectives.

Step out on a limb of interpretation (Why):
Why is the person you're observing doing what they're doing, and in the particular way that they are doing it? This step usually requires that you make informed guesses regarding motivation and emotions. Step out on a limb in order to project meaning into the situation that you have been observing. This step will reveal assumptions that you should test with users, and often uncovers unexpected realizations about a particular situation.

User Camera Study

WHY do a user camera study

In empathy work, you want to understand your users' lives, and specific tasks within the context of their lives. A User Camera Study allows us to understand a user's experience by seeing it through their eyes. It will also allow you to understand environments to which you might not normally have access.

HOW to do a user camera study

1. Identify subjects whose perspective you are interested in learning more about.

2. Briefly explain the purpose of the study, and ask if they would be willing to take photographs of their experiences. Get permission to use images they take.

3. Provide a camera to your subject and instructions such as: "We would like to understand what a day in your life feels like. On a day of your choosing, take this camera with you everywhere you go, and take photos of experiences that are important to you." Or you could try: "Please document your [morning routine] experience with this camera." Or, "Take pictures of things that are meaningful to you in your kitchen." Frame your request a little broader than what you believe your problem space might be, in order to capture the surrounding context. Many insights can emerge from that surrounding space.

4. Afterwards, have your subject walk you through the pictures and explain the significance of what they captured. Return to a good empathetic interviewing technique to understand the deeper meaning of the visuals and the experience they represent.

METHOD

Interview Preparation

WHY prepare for an interview

Time with users is precious; you need to make the most of it! While you must always allow room for the spontaneous, blissful serendipity of a user-guided conversation, you should never abdicate your responsibility to prepare for interviews. Especially in following up with users (after testing, etc.), it is imperative to plan your interviews. You may not get to every question you prepare, but you should come in with a plan for engagement.

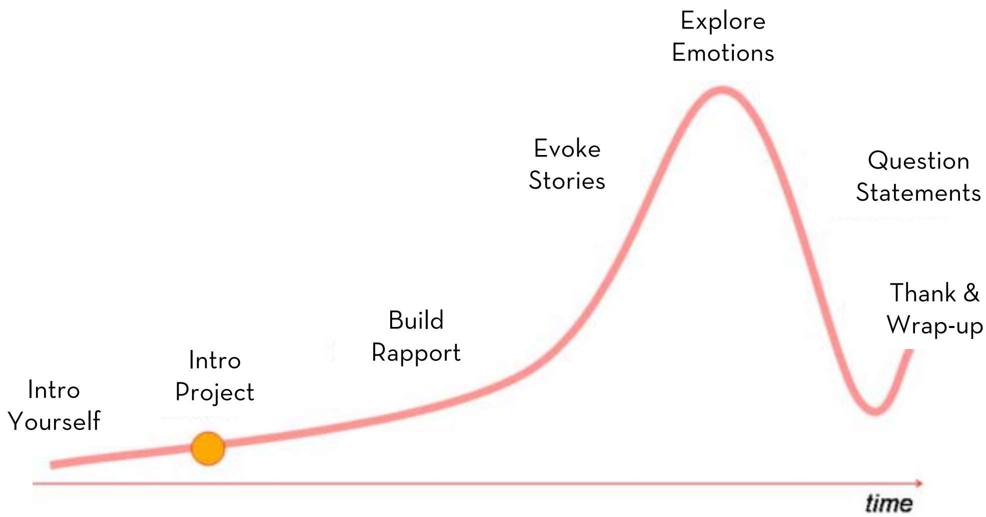
HOW to prepare for an interview

Brainstorm questions
Write down all of the potential questions your team can generate. Try to build on one another's ideas in order to flesh out meaningful subject areas.

Identify and order themes
Similar to "grouping" in synthesis, have your team identify themes or subject areas into which most questions fall; once you've identified the themes of your question-pool, determine the order that would allow the conversation to flow most naturally. This will enable you to structure the flow of your interview, decreasing the potential for hosting a seemingly-scattershot interaction with your user.

Refine questions
Once you have all the questions grouped by theme and order, you may find that there are some redundant areas of conversation, or questions that seem strangely out of place. Take a few moments to make sure that you leave room in your planning to ask plenty of "why?" questions, plenty of "tell me about the last time you ___?" questions, and plenty of questions that are directed at how the user FEELS.

Interview for Empathy



WHY interview

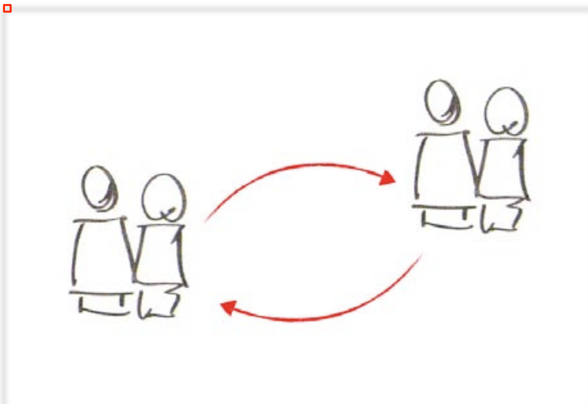
You want to understand a person's thoughts, emotions, and motivations, so that you can determine how to innovate for him or her. By understanding the choices that person makes and the behaviors that person engages in, you can identify their needs, and design to meet those needs.

HOW to interview

Ask why. Even when you think you know the answer, ask people why they do or say things. The answers will sometimes surprise you. A conversation started from one question should go on as long as it needs to.
Never say "usually" when asking a question. Instead, ask about a specific instance or occurrence, such as "tell me about the last time you ___"
Encourage stories. Whether or not the stories people tell are true, they reveal how they think about the world. Ask questions that get people telling stories.
Look for inconsistencies. Sometimes what people say and what they do are different. These inconsistencies often hide interesting insights.
Pay attention to nonverbal cues. Be aware of body language and emotions.
Don't be afraid of silence. Interviewers often feel the need to ask another question when there is a pause. If you allow for silence, a person can reflect on what they've just said and may reveal something deeper.
Don't suggest answers to your questions. Even if they pause before answering, don't help them by suggesting an answer. This can unintentionally get people to say things that agree with your expectations.
Ask questions neutrally. "What do you think about buying gifts for your spouse?" is a better question than "Don't you think shopping is great?" because the first question doesn't imply that there is a right answer.
Don't ask binary questions. Binary questions can be answered in a word; you want to host a conversation built upon stories.
Make sure you're prepared to capture. Always interview in pairs. If this is not possible, you should use a voice recorder—it is impossible to properly engage a user and take detailed notes at the same time.

d.

Story Share-and-Capture



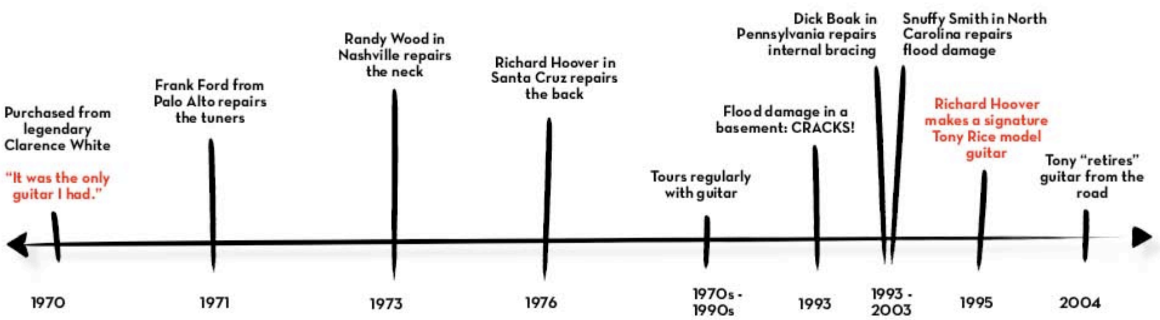
WHY story share-and-capture

A team share serves at least three purposes. First, it allows team members to come up to speed about what different people saw and heard in the field. Even if all the team members were present for the same fieldwork, comparing how each experienced it is valuable. Second, in listening and probing for more information, team members can draw out more nuance and meaning from the experience than you may have initially realized. This starts the synthesis process. Third, in capturing each interesting detail of the fieldwork, you begin the space saturation process.

HOW to story share-and-capture

Unpack observations and air all the stories that stick out to you about what you saw and heard during your empathy fieldwork. Each member in the group should tell user stories and share notes while other members headline quotes, surprises, and other interesting bits – one headline per post-it. These post-its become part of the team's space saturation, and can also be physically grouped to illuminate theme and patterns that emerge (See "Saturate and Group" method card). The end goal is to understand what is really going on with each user. Discover who that person is and what that person needs in regard to your problem space.

Journey Map



WHY use a journey map

To gain empathy for a person or understanding of one's process through an experience, consider the details of that process to illuminate areas of potential insights. Creating a journey map is an excellent way to systematically think about the steps or milestones of a process. A journey map can be used for your own empathy work, or to communicate your findings to others.

HOW to use a journey map

Create diagrams that capture multiple observations, e.g. a map of a user's day, a map of a user's experience, or a map of how a product moves through space and time (from manufacturing to store shelf to user's hands). Consider a process or journey that is relevant, or even tangential to, your problem space. For example, you could consider your user's morning breakfast routine. You could capture every event of one person's exercise in a month – and consider who she was with, where she came from, where she exercised, and where she went afterwards. Or perhaps you are developing a dating service website; you could document every communication between two people before the first date. One important concern is to be comprehensive within the variables you choose to capture. (Don't overlook the opening of the window shades in the morning breakfast routine.) What seems meaningless, could actually be the nugget that develops into a stunning insight. You can create a journey map based on observation and interview – or you might ask a user to draw a journey map and then explain it to you.

Organize the data in a way that makes sense: a timeline of events, a number of parallel timelines that allows for easy comparison, a series of pictures, or a stack of cards. Then look for patterns and anomalies and question why those themes or events occurred. Push yourself to connect individual events to a larger context or framework. It is often the pairing of an observation with the designer's knowledge and perspective that yields a meaningful insight.

Composite Character Profile

Franklin
- 38 years old
- Divorced
- 2 kids
- Diabetic
- Free-clinic care-giver
- Has extreme tendencies in consumption and preparation of food.
- Balances his health and that of others, favoring the health of others.

WHY use a composite character profile

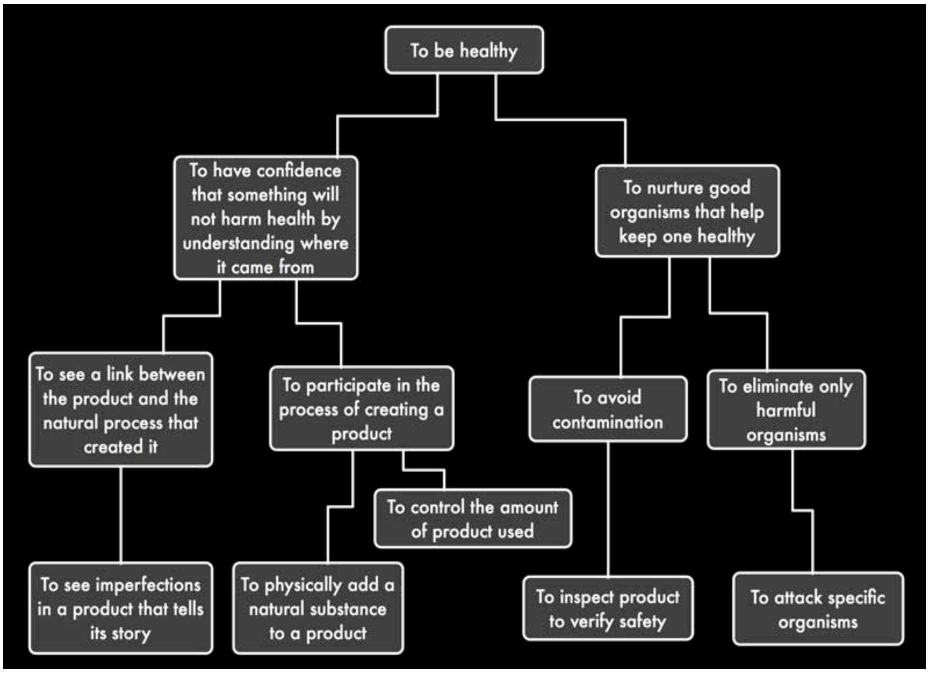
You can use the composite character profile to bucket interesting observations into one specific, recognizable character. Teams sometimes get hung up on outlying (or non-essential) characteristics of any of a number of particular potential users, and the composite character profile is a way for them to focus the team's attention on the salient and relevant characteristics of the user whom they wish to address. Forming a composite character can be a great way to create a "guinea pig" to keep the team moving forward.

HOW to use a composite character profile

The composite character profile is a synthesis method whereby the team creates a (semi)-fictional character who embodies the human observations the team has made in the field. These might include "typical" characteristics, trends, and other patterns that the team has identified in your user group over the course of your field work.

In order to create a composite character profile, a team needs to have unpacked its field observations and saturated its team space. After this is done, a team should survey across the individual users it encountered in the field to identify relevant dimensions of commonality and/or complementarity – these dimensions could be demographic information, strange proclivities and habits, or sources of motivation, to name only a few. After several dimensions of commonality have been identified, list these features of the user; if there are any dimensions of complementarity (those which may not be shared by all users, but are interesting to the team and not necessarily mutually exclusive), the team should add these as well. Last, give your character a name, and make sure every member of the team buys into the identity and corresponding characteristics that the team has created.

Why-How Laddering



WHY why-how ladder

As a general rule, asking 'why' yields more abstract statements and asking 'how' yields specific statements. Often times abstract statements are more meaningful but not as directly actionable, and the opposite is true of more specific statements. That is why you ask 'why?' often during interviews – in order to get toward more meaningful feelings from users rather than specific likes and dislikes, and surface layer answers. Outside an interview, when you think about the needs of someone, you can use why-how laddering to flesh out a number of needs, and find a middle stratum of needs that are both meaningful and actionable.

HOW to why-how ladder

When considering the needs of your user, start with a meaningful one. Write that need on the board and then ladder up from there by asking 'why'. Ask why your user would have that need, and phrase the answer as a need. For example, "Why would she 'need to see a link between a product and the natural process that created it'? Because she 'needs to have confidence that something will not harm her health by understanding where it came from'." Combine your observations and interviews with your intuition to identify that need. Then take that more abstract need and ask why again, to create another need. Write each on the board above the former. At a certain point you will reach a very abstract need, common to just about everyone, such as the 'need to be healthy'. This is the top of that need hierarchy branch.

You can also ask 'how' to develop more specific needs. Climb up ('why?') and down (how?) in branches to flesh out a set of needs for your user. You might come up to one need and then come back down. In the previous example, you climbed up to the 'need to understand where a product came from'. Then ask 'how' to identify the 'need to participate in the process of creating a product'. There will also be multiple answers to your 'whys' and 'hows' – branch out and write those down.

The result (after some editing and refining) is a needs hierarchy that paints a full picture of your user or composite user. Alternatively, you can use this tool to hone in on one or two particularly salient needs.

METHOD

Critical Reading Checklist

Critical Reading Checklist

1.) What's the point?

2.) Who says?

3.) What's new?

4.) Who cares?

WHY use a critical reading checklist

The Checklist is a tool used to determine whether a team has arrived at a meaningful, unique Point of View (POV). The original "Critical Reading Checklist" tool was developed by David Larabee, of the Stanford School of Education, and repurposed in the context of a design process to evaluate POVs.

Use this Checklist to ensure that your team's POV is valid, insightful, actionable, unique, narrow, meaningful, and exciting. While this method is not in itself sufficient to address the deficiencies of a POV, it is a great tool to think through and evaluate the usefulness of the POV.

HOW to use a critical reading checklist

We ask ourselves four basic questions about our Point of View:

1. **What's the point?** – What is your team's angle?
• What is your team's framework in stating a POV?
• Is it User-centered, Need-based, and Insight-driven?
2. **Who says?** – How valid is your team's POV?
• Is your position supported by findings from users?
• Is it a distillation of findings? Is this applicable outside of one colorful interview?
3. **What's new?** – What is the value-add of your POV?
• Have you articulated your findings in a new way?
• Are they placed in the context of a user?
• If your POV doesn't feel new, try being more specific.
4. **Who cares?** – How is your POV significant?
• Your team should be excited at this point!
• Is this work *worth doing? If not, ask yourself why?*
• Reframe/rephrase until you get it right.

METHOD

Brainstorming

One Conversation at a Time

Go for Quantity

Headline!

Build on the Ideas of Others

Encourage wild ideas

Be Visual

Stay on Topic

Defer Judgement - NO Blocking

WHY brainstorm

Brainstorming is a great way to come up with a lot of ideas that you would not be able to generate by just sitting down with a pen and paper. The intention of brainstorming is to leverage the collective thinking of the group, by engaging with each other, listening, and building on other ideas. Conducting a brainstorm also creates a distinct segment of time when you intentionally turn up the generative part of your brain and turn down the evaluative part. Brainstorming can be used throughout a design process; of course to come up with design solutions, but also any time you are trying to come up with ideas, such as planning where to do empathy work, or thinking about product and services related to your project – as two examples.

HOW to brainstorm

Be intentional about setting aside a period of time when your team will be in “brainstorm mode” – when the sole goal is to come up with as many ideas as possible, and when judgment of those ideas will not come into the discussion. Invest energy into a short period of time, such as 15 or 30 minutes of high engagement. Get in front of a whiteboard or around a table, but take an active posture of standing or sitting upright. Get close together.

Write down clearly what you are brainstorming. Using a How-Might-We (HMW) question is a great way to frame a brainstorm (e.g. HMW give each shopper a personal checkout experience?). (See more on the “’How Might We’” Questions” method card.)

There are at least two ways to capture the ideas of a brainstorming:

1. Scribe: the scribe legibly and visually captures on the board ideas that team members call out. It is very important to capture every idea, regardless of your own feelings about each idea.
2. All-in: Each person will write down each of his or her ideas as they come, and **verbally share it** with the group. It is great to do this with post-it notes, so you can write your idea and then stick it on the board.

Follow and (nicely) enforce the brainstorming rules – they are intended to increase your creative output.

METHOD

Storytelling

WHY storytelling over other forms of communication

It seems stories are hard-wired into our psyche. People have been passing information along via storytelling for as long as humans have had a rich language to draw from. Stories are a great way to connect people with ideas, at a human level. A well-told story – focused on pertinent details that express surprising meaning and underlying emotions – affects the listeners feelings and intellect simultaneously.

HOW to design a story

What's the point? Know what you intend to convey both narratively and emotionally. You should be able to describe the essence of the transformation of your character in one sentence and the emotional tone in a couple of words.

Be Authentic: Stories are more powerful when they include a little bit of you. Honest expression is stronger and more resonant than cliché .

Character-Driven: Characters are a great vehicle to express deep human needs and generate empathy and interest from your audience. Focus on character.

Dramatic Action: Your story should have 3 components: Action, Conflict, and Transformation.
<u>Action</u>: What is the character trying to do? What are the actions she is taking to achieve it?
<u>Conflict</u>: What is in her way? What questions linger beneath the surface?
<u>Transformation</u>: What is the big insight? How do the action and conflict resolve?

Details: "Behind all behavior lies emotion." What details can you share about your character and their situation that will suggest the emotions that lie beneath?

Design Process is a Built-in Story: Use what you've learned during the design process.
Empathy maps well to Character. Needs map to Conflict, Insights + Solutions map to Transformation.

Shooting Video

WHY video

Video is a powerful medium for communicating ideas, insights & stories. Planning ahead, but staying open to possibility will give you the best chance of stumbling on a magical moment. Know what you are trying to do and be aggressive about communicating it in the frame. If it's not in the frame, it doesn't exist.

HOW to shoot video

Some tips for shooting video:

Direct Attention:
1. Know your intention. What are you trying to highlight? How do you want it to feel?
2. Bias toward tight framing.
3. Figure Ground: Get a good contrast between the subject & the background.
4. Be conscious of light sources & shadows on your subject.
5. Follow the rule of thirds, frame off-center.

Plan to Improvise: Know what you want, but be flexible about how you get it.
1. Plan Ahead: Storyboard out your idea. Iterate!
2. Get Lucky: Follow your curiosity on the day of your shoot.
3. Overshoot! Get more than you think you need! More stuff gives you more options when editing. Longer takes allow you some wiggle room for transitions.

Audio is Important!!! Remember the 2 rules:
1. Mic close to the subject.
2. Point away from (undesired) noise.