

Design Research: Engaging with customers

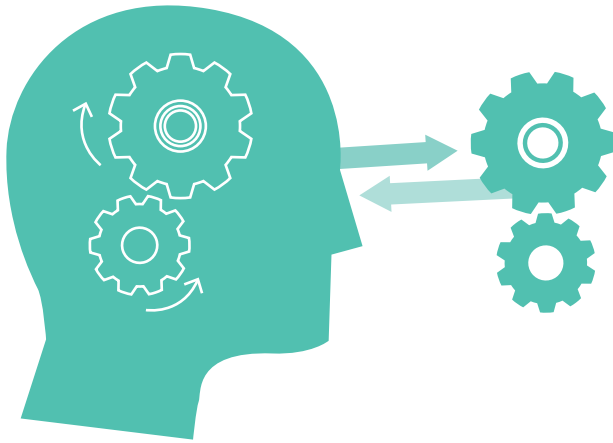


When is design thinking valuable for customer experience professionals?

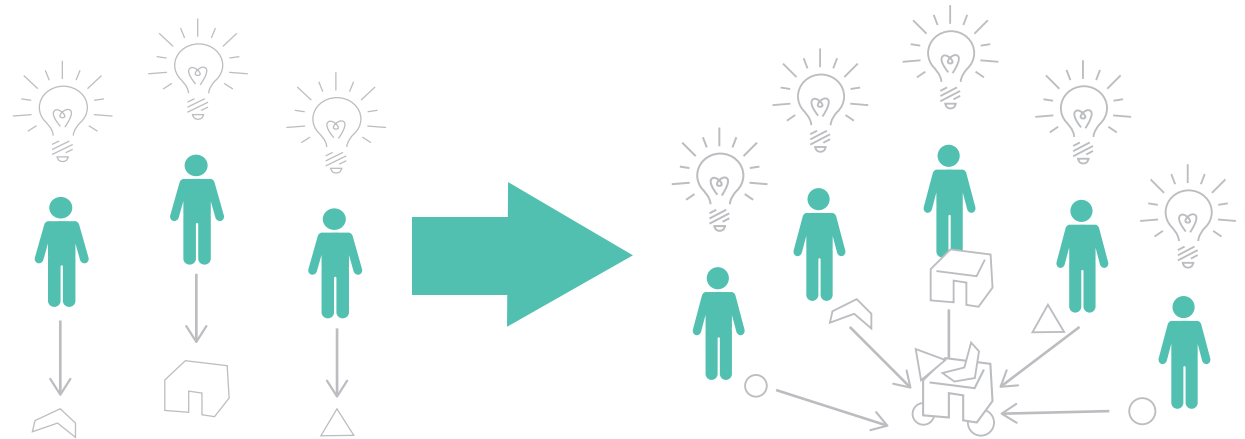
EMPATHIZE

Understanding your customers

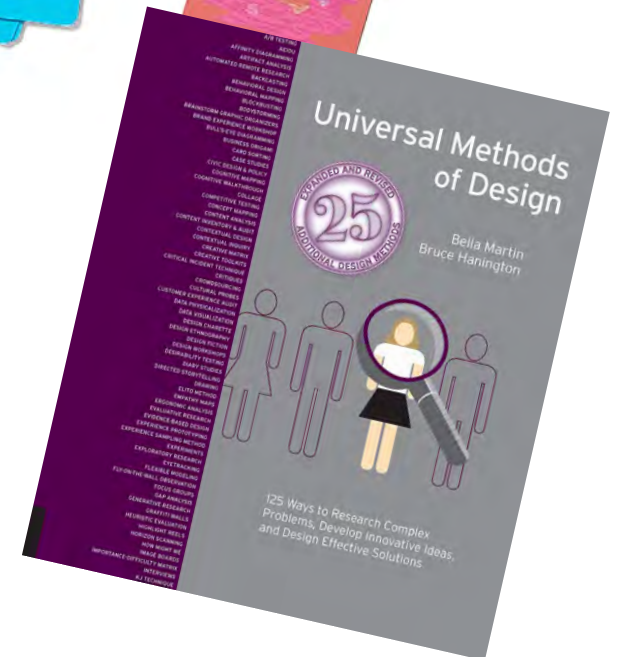
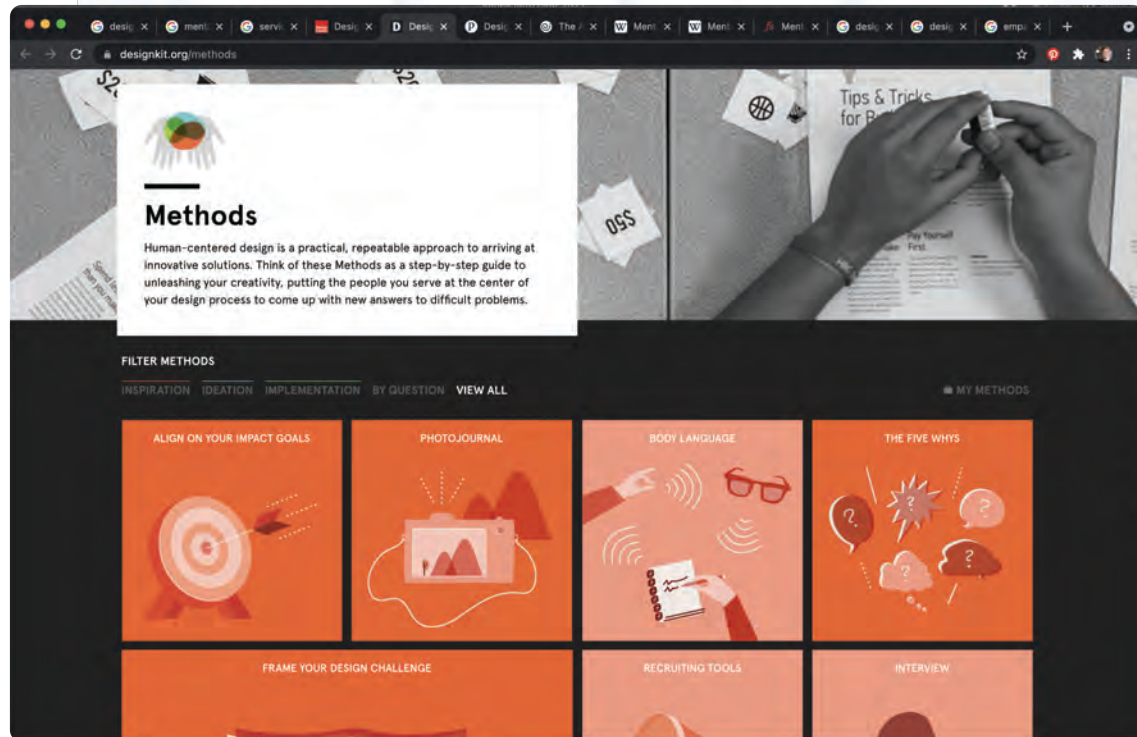
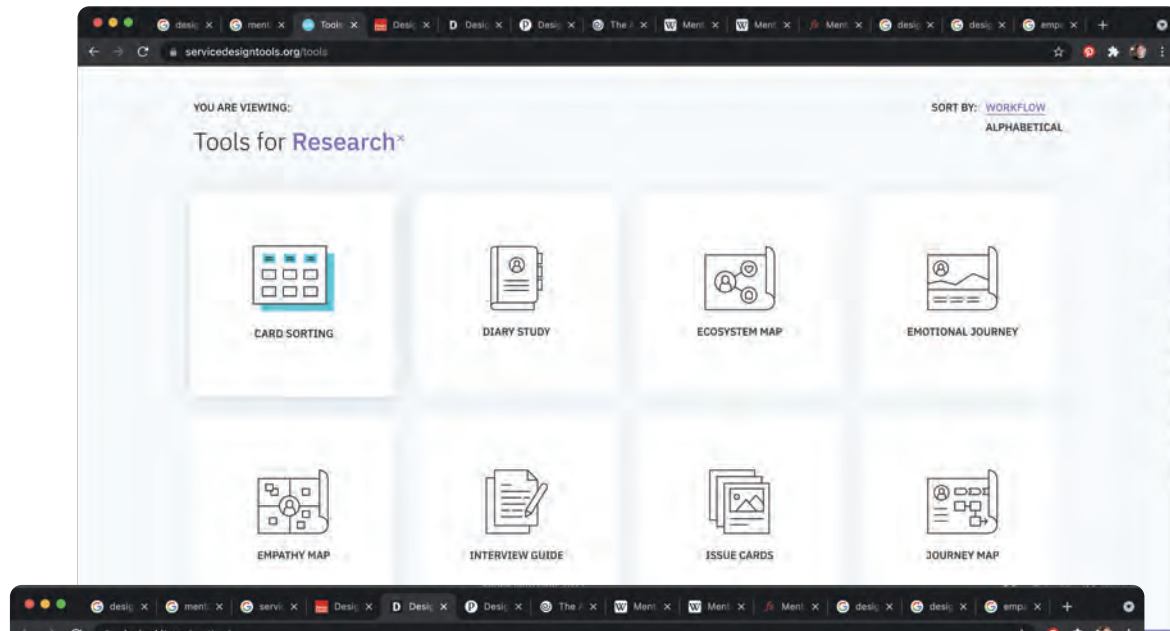
EMPATHIZE → MENTAL MODELS

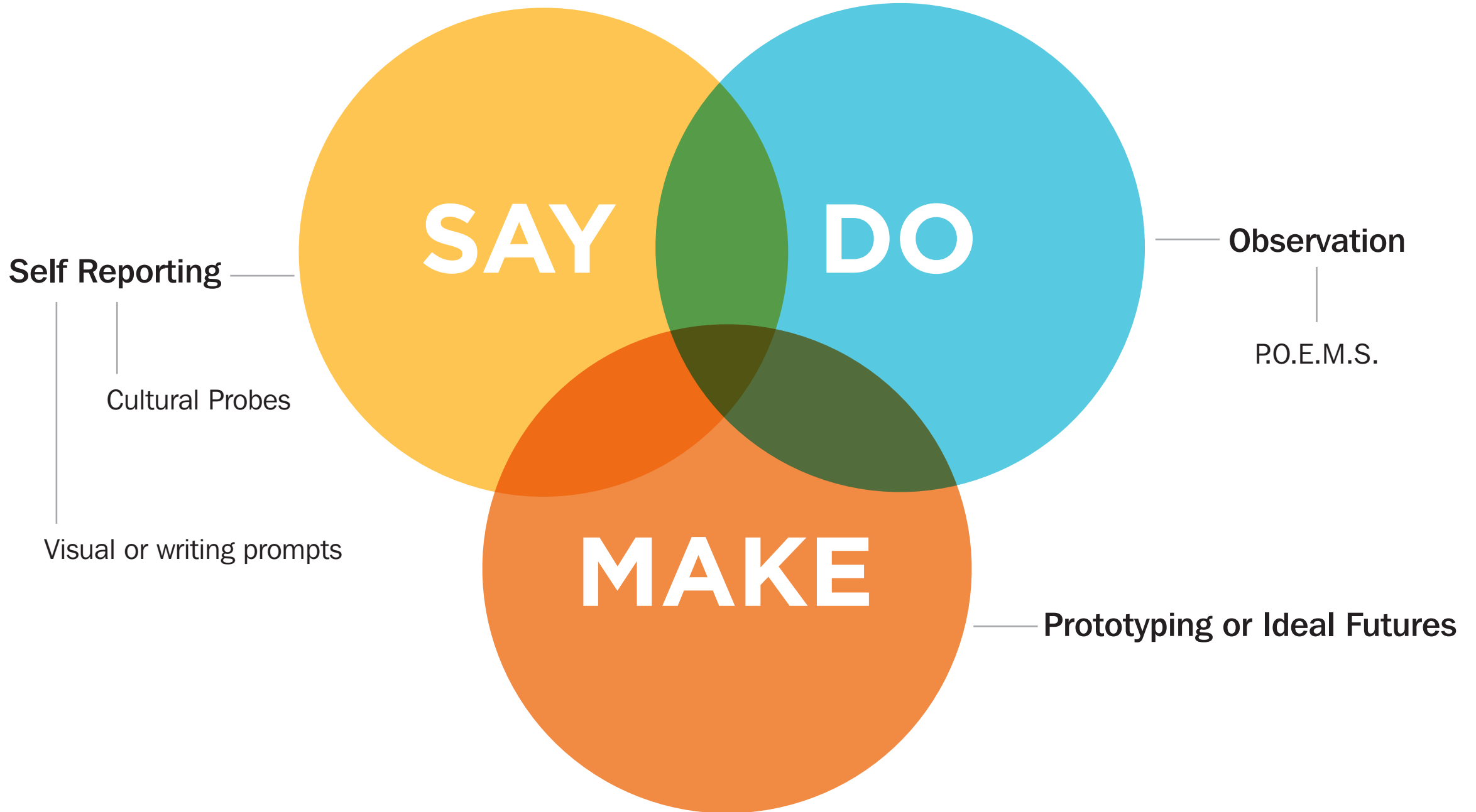


Adjusting our understanding of customer's experiences and goals



Aligning our team's mental models to support share understanding of the defined problem and ideation





What Customers Do



Preparing for Observation:

As you're preparing for observing customers, consider the size of your team, what tools they'll need in the field, and create a framework to quickly categorize their observations so make data analysis easier.

P.O.E.M.S.

People

Objects

Environments

Messages

Services

A.E.I.O.U

Activities

Environments

Interactions

Objects

Users

Improving employee experiences in frontline teams

People	Who is present in the space? Who is engaging with the service/product? What are different people doing?
Objects	What objects are in the space? How are people engaging with those objects?
Environments	How is the environment arranged? What are the main features in the physical space? How are people engaging with the physical space?
Messages	What is being communicated? How is this being communicated?
Services	What service(s) are being offered or consumed?
Activities	What actions are people taking?

Customer service representatives (at desk)
Team leads (walking the floor)

Customers (on other end of the phone)

Reference information tacked to the side of cubicle walls, often very little space left bare
Headsets and phones
Two computer screens to display different systems

Multiple representatives in open cubicles, creates a constant hum of background noise. Some cubicles don't have a dividing wall between.

Information about benefits. Representative listens to request and then begins pulling up the right information from different systems and sharing info.

Providing information about benefits. Explaining how benefits worked or will work. Taking requests for different tasks (i.e. new id cards, provider lookup, etc.)

Clicking between multiple screens and internal systems - average of 40 to 50 clicks per call.

What Customers Say

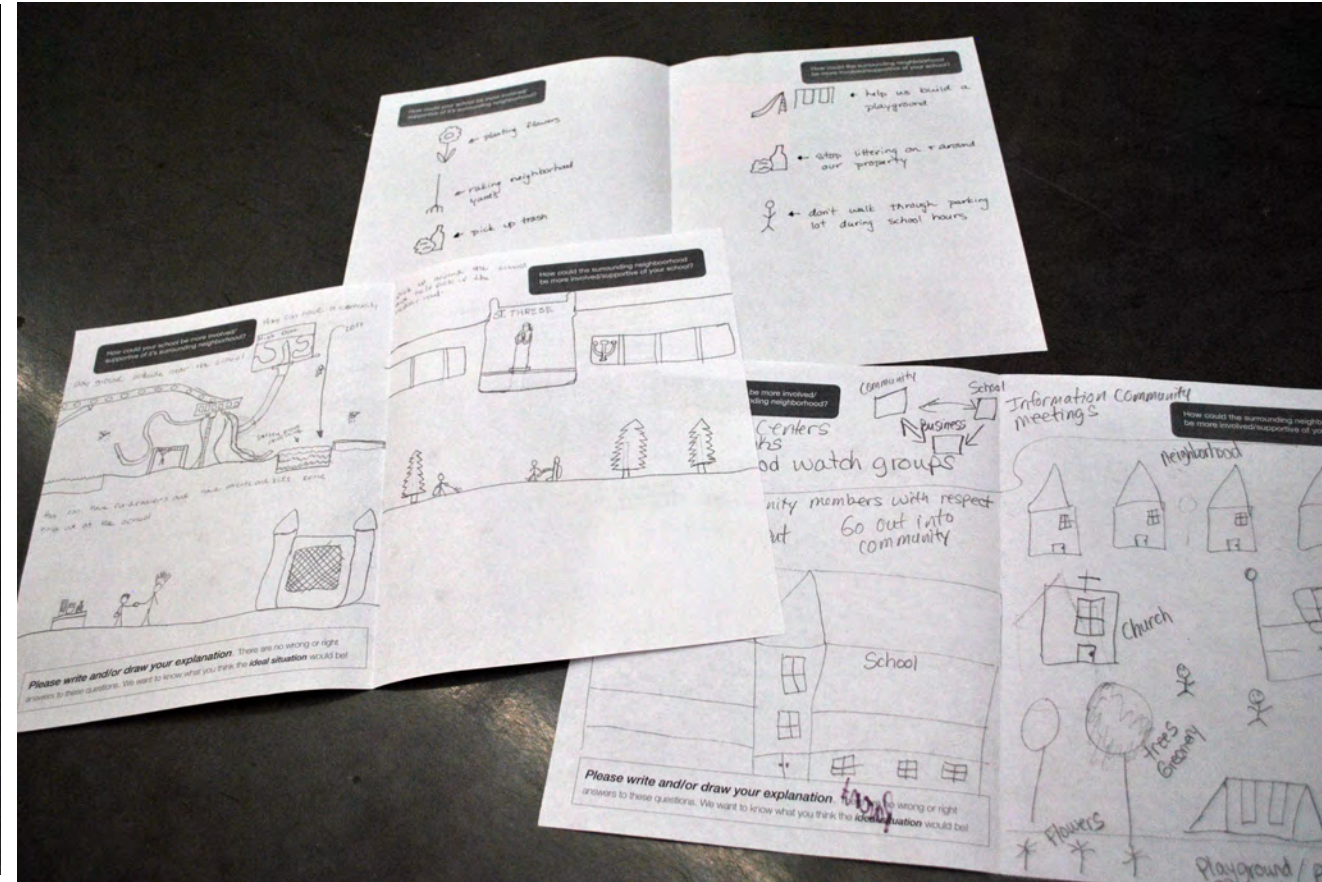


Using card sorting as an interview tool can make this activity feel more accessible and gives participants an easy starting point to begin sharing information. Useful to quickly gain a deep amount of information around a core prompt or question.

Interviewing with Card Sorting

1. Decide on your core prompt/question(s). What topic do you want to hear your customer share about?
2. Have a diverse group select a range of images. Or, if you're working digitally, provide instructions how your customers can select and/or share images of their own.
3. Ask them to select the images that best answer the prompt, or have them put the images in order of most important to least.
4. Have your customer walk you through the story they've created with these images. *(Note: recommend recording)*





(Participatory tools to articulate children's everyday experiences in their neighborhoods)

Visual or writing prompts

Sometimes, you may not have direct access to your customers, or your aiming to gather feedback from a large group of customers. Creating asynchronous prompt tools that allow your customers to provide feedback in their own time, and in their own words or even through drawings can extend your reach. Different formats may be more inviting for different groups of customers to engage with. Consider how you can use different tools from stickers to digital platforms.

photo credit:@catherinelegros

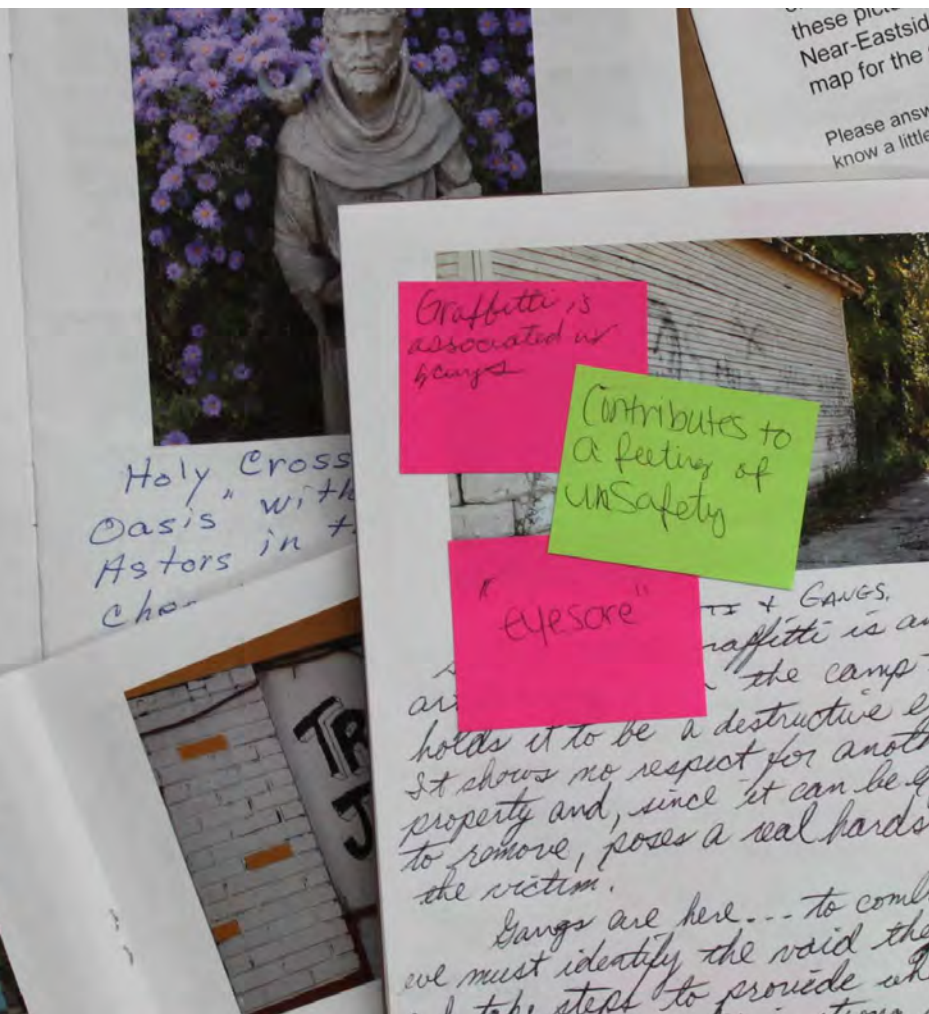


photo credit: Benjamin Chan, Healthy Food Cultural Probe (Design for America RISD|Brown)



Cultural Probes

Research packages are given to customers so they may self-document over a period of time, at their own pace. Customers can produce rich, context detail records of their experiences, sharing how they feel and interact with everyday parts of their lives. These probes may be as simple as a diary, a disposable camera or a set of instructions designed to elicit the kind detailed reflection or behavior the project calls for.



Preparing Self-Reporting Tools

1. Decide on your core prompt/questions. Is this a one time question or a topic that you want to understand over a period of time?
2. What the best, easiest way for your customers to share this information? (i.e. video recordings, stickers, daily prompts, etc.)
3. Create a mock up of your tool with the questions. Test it out with friends or family to see how the engage. Adjust as necessary.
4. Plan for how you'll deliver your toolkits to your customers. What kind of instructions do you need to include? How will they get this information back to you? How long will they have to return the tools to you? (Note: If this is by mail, you'll want to include postage)
5. Plan for how you'll categorize the information you receive back.

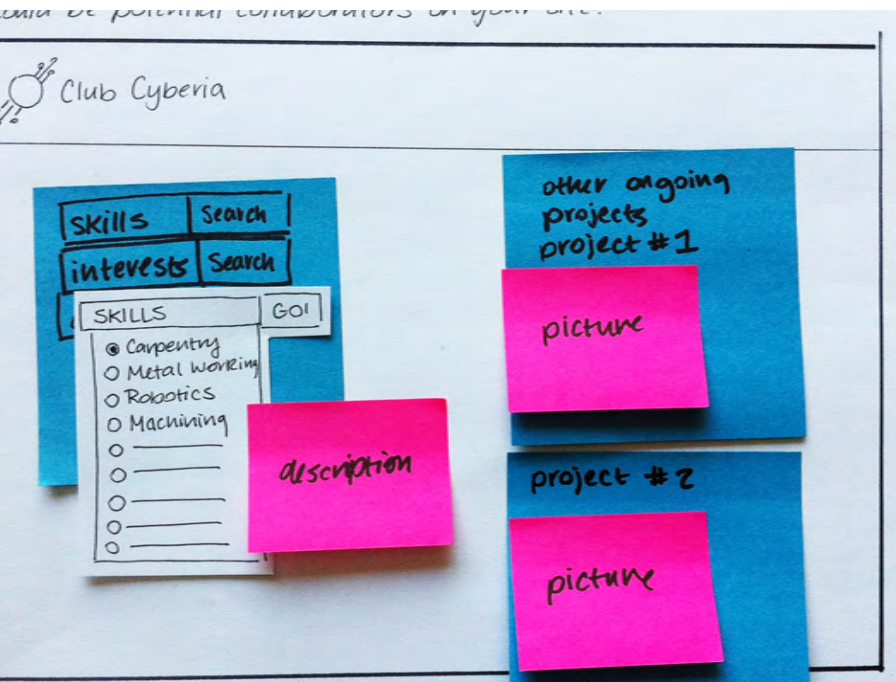
What Customers Make



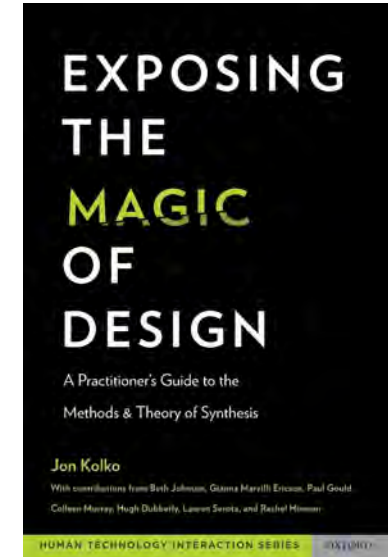
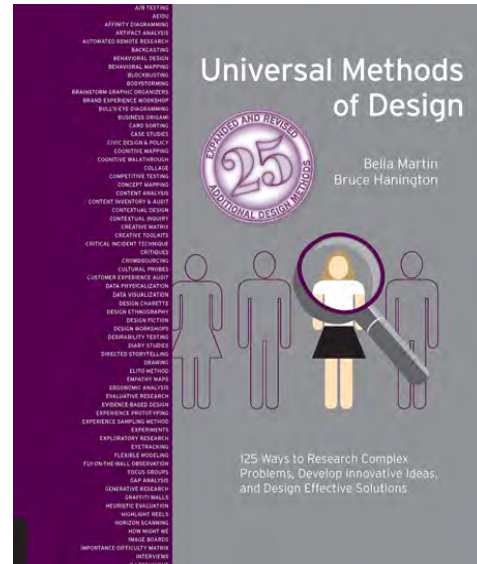
Making allows customers to share ideas and desires for the future that may not be captured through tools like observation which can only examine present circumstances and behavior. Lower fidelity tools lower potential barriers to participate, meaning that even simple prototypes can produce powerful insights.

Using making to gather information:

1. Decide on your core prompt/question(s). What do you want to learn from your customers? What kind of instructions do you need to provide?
2. Select what resources your customers will engage with. This could look differently depending on what prompt they're responding to.
3. Plan out the size of your groups (smaller is better), and create well supplied resource kits for each group or table.
4. Give them a time limit.
5. Have each customer or group share what they've made and how it responds to the prompt. *(Note: record this information)*



Other resources



[HTTPS://SERVICEDESIGNTOOLS.ORG/TOOLS](https://servicedesigntools.org/tools)

[HTTPS://WWW.DESIGNKIT.ORG/METHODS](https://www.designkit.org/methods)