

Getting to Principal

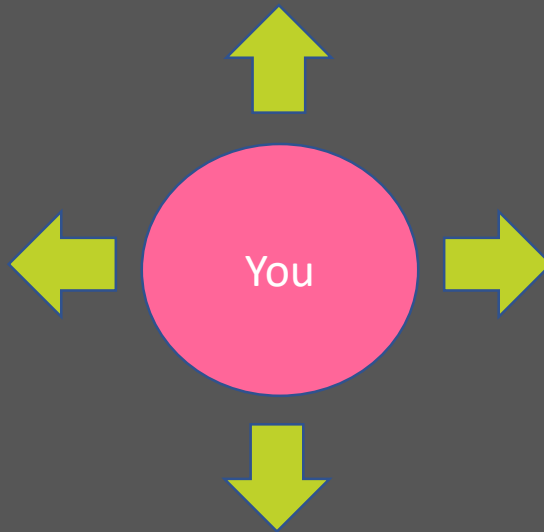
Attitudes and behaviours for effective strategic research

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Goal: make everyone around you
successful

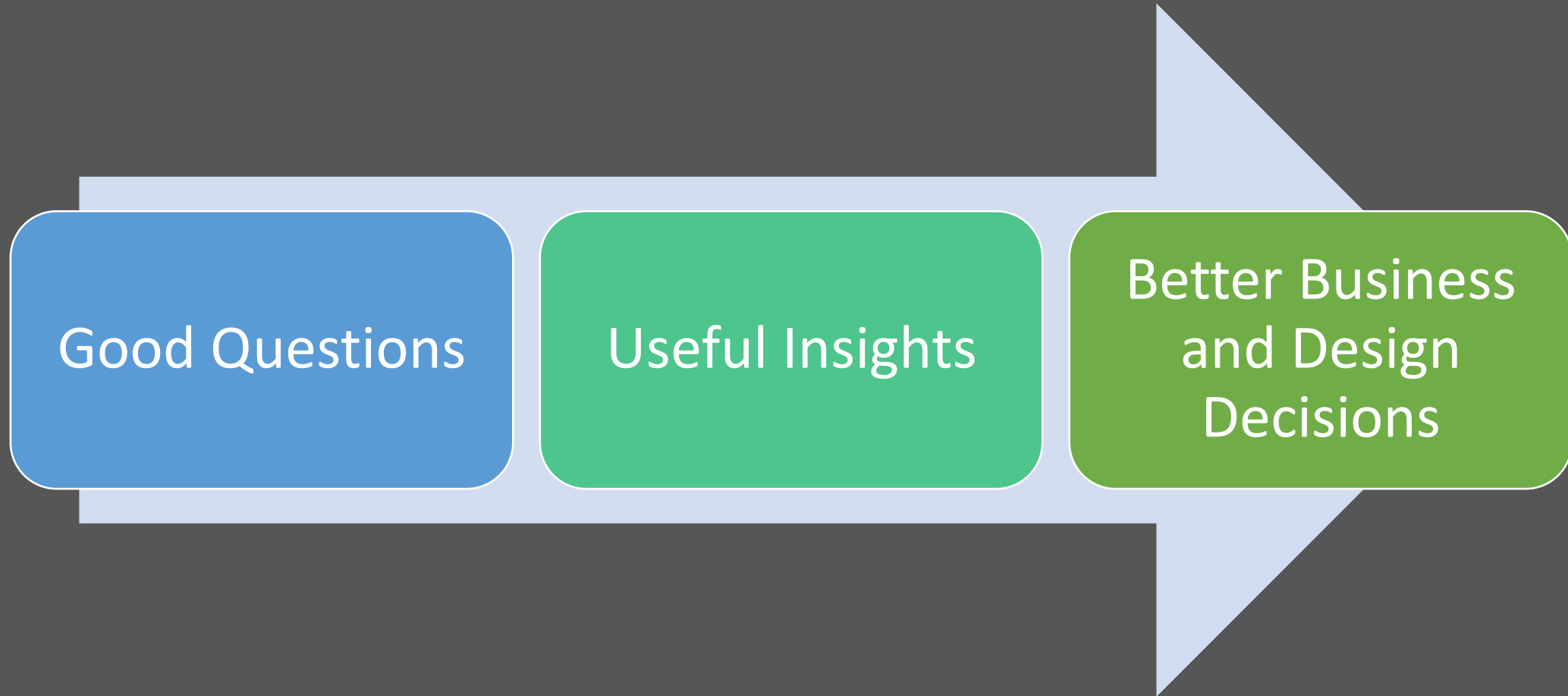


Three steps to being a strategic partner to senior people

Research as a way to support better decisions

Especially the big decisions

Good:



Bad:

Weak Questions

Weak Insights

Weaker Business
and Design
Decisions

Part 1: So what decisions are keeping you up at night?

Understanding What's On Their Mind

Do

- Keep the conversation in terms of what they care about
- Understand how the org makes money* and does its thing
- Understand what KPIs they're on the hook for
- Get details of milestones and major decisions
- Be clear on WHEN insights are needed
- Dig out areas of most angst
- Probe for areas of unknowns
- Notice what's not being said

Don't

- Ask them to understand research geekery
- Focus only on your fave methods
- Focus only on what can be easily researched
- Imply that UXR is important in and of itself. Its not.

* Or whatever keeps it running

Understand the **terrain** of the project

- When are the big milestones?
- What are the ways the project needs to prove itself?
- What are the big decisions people need to make soon?
- What's keeping your stakeholders up at night?
- What will get your boss and stakeholders promoted? (make everyone successful)
- What's coming down the pipe? (likely surprises)
- Who can you keep close to, to stay current on the project?

Use whatever method or analogy works for you to ensure you know the current landscape of the project. Work to support that.

Part 1 is done when you can
elicit a “Yeah, that’s right” about
the big decisions they’re facing

Part 2: Enrich their
understanding of what types of
insights are available

Four big buckets of questions

1. Who are the customers*?
2. What can the proposition do to delight them?
3. How should the service work?
4. Does the service do what its supposed to?

(hat tip Eric Brown)

* users, students, patients, people-who-will-engage, etc.

1. Who are the customers? [ground truth]

demographics

psychographics

technographics

shopping patterns

what they need

unmet needs

delighters

pain points

goals

attitudes and behaviours

motivations

day-in-the-life

key relationships

important tools

touchpoints

locations and places

Etc.

2. What should the proposition do? [strategic]

What excites customers about prop X?

What turns them off?

How much?

Why?

What if we make minor or major changes?

How much do they value it?

How much would they pay for it?

Etc.

3. How should it work? [tactical]

Should it be a subscription or bundle offering?

Should it have rounded corners?

How big should the button be?

Which call-to-action text works best?

Etc.

4. Does it do what it should? [validate]

How much is metric X?

How has it changed over time?

What caused that?

Who are the customers contributing to that?

Etc.

Note: metrics should be actionable, accessible and auditable.

Enriching their sense of possible insights

Do

- Collaboratively agree what their project actually needs
- Show how the measurement will support their decision and timelines
- Balance qual + quant, what + how, thick + skinny
- Give luscious examples: VoC vids, eye-catching visuals, rich reports, etc.

Don't

- Rely on cookie cutter approaches or clichés
- Baffle them with details
- Merely accept what they ask for

Part 2 is done when you can elicit a
“Yeah, that’s right” about **the**
insights they’d love to have and
how it’ll help give confidence to the
decision

Interval : Simple visuals to get
the conversation focused

Where are the big-bet unknowns?

Multi-project
applicability



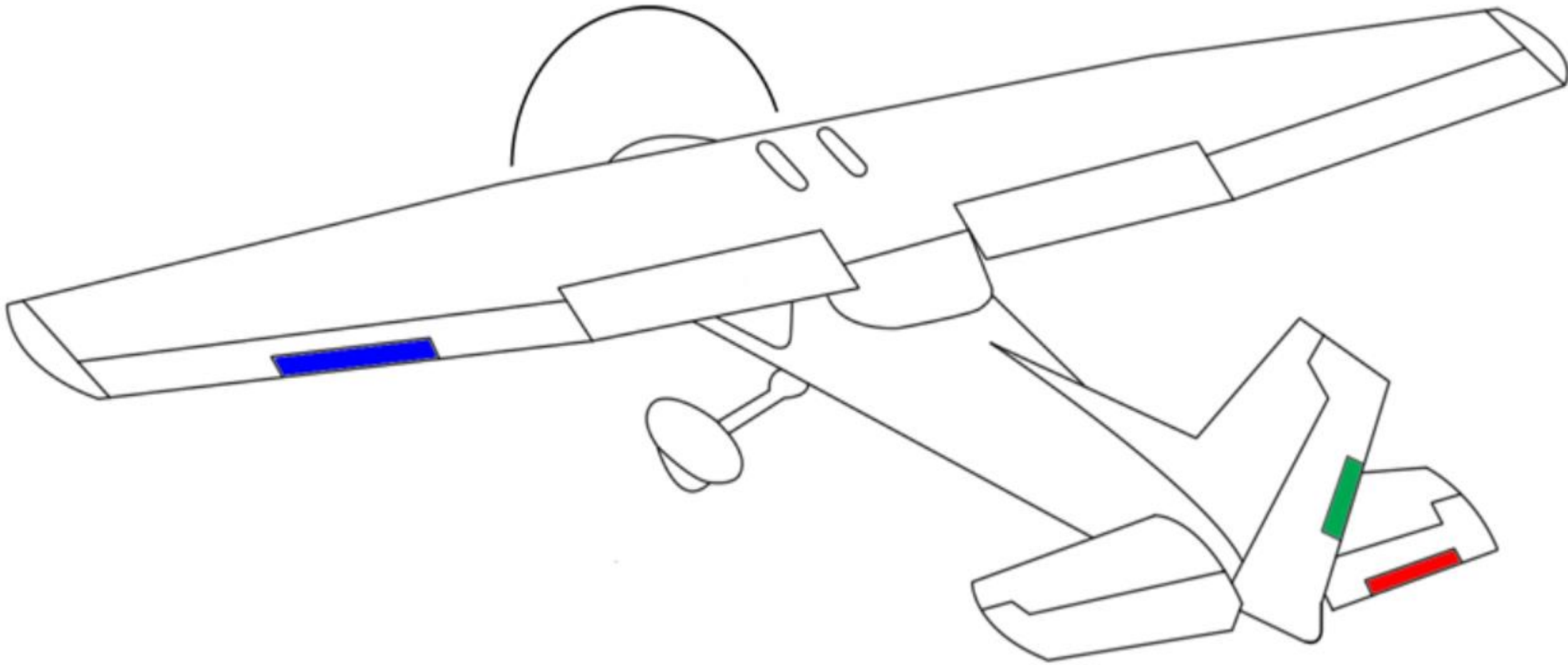
Narrower
applicability

Areas of
Fewer
Unknowns

Areas of
More
Unknowns

What Insights do you need?

	Tactically (project's next step)	Strategically (Org's next step)
Essential Must Haves		
Important to Haves		
Nice to Haves		



https://en.wikipedia.org/wiki/Trim_tab#/media/File:Fletner_-_trim_tabs.png

Part 3: Agree on Good Research Questions

Asking Good Research Questions

You should be able to take and refine the questions they have

Iterate the question till it

- Will get at the insights required

- Is simple and focused

- Is suited to the double diamond stage (expanding / contracting) where the project actually is

Improving Questions : My Top 3

Is it ok to launch? Or is it just too crap?

Does it meet UX quality bar (time on task, usability bugs, error rates, subjective ratings, etc)

Will customers want this?

How to message its value to customers?

What conversations to have with customers that will make sense to them?

NPS / CSAT ratings

Are we delivering the intended experiences? If not, where, and by how much?

Asking Good Research Questions

Do

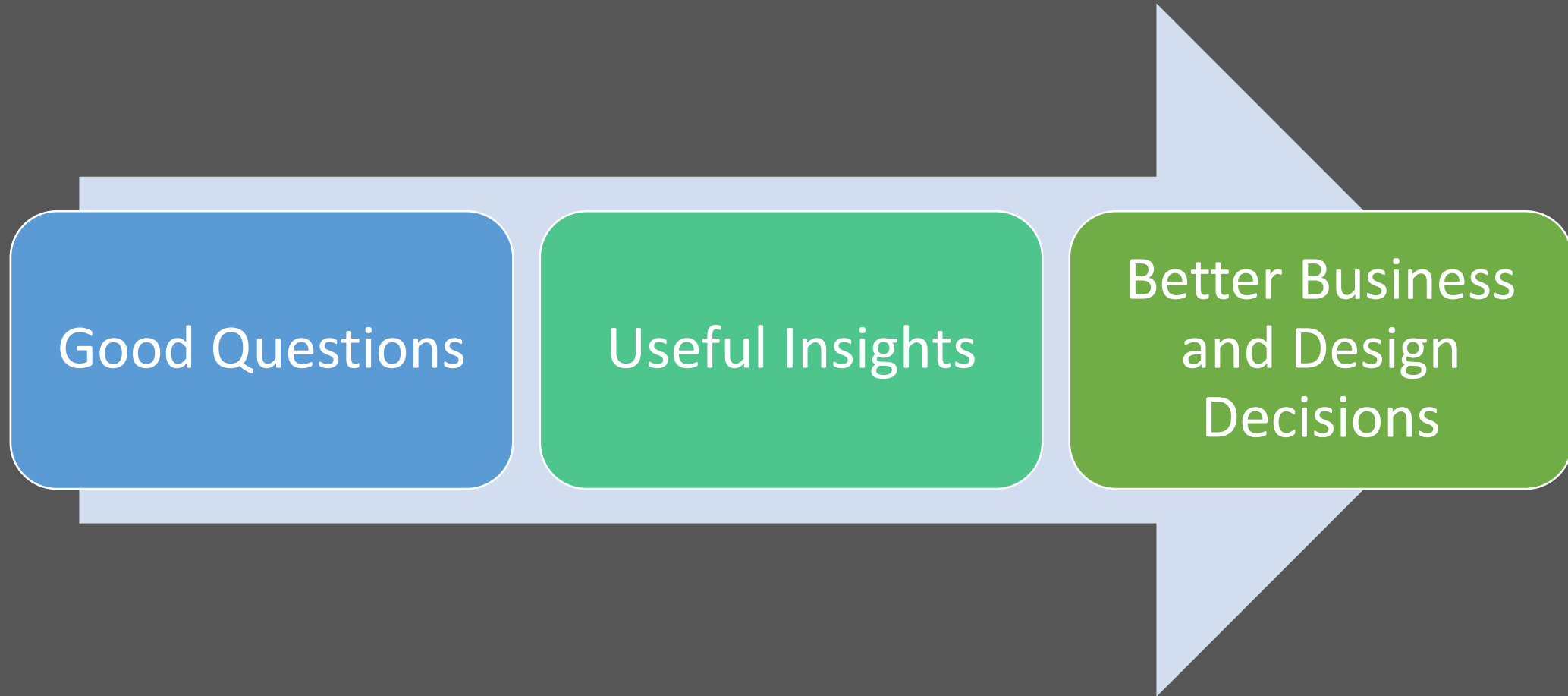
- Lead the discussion but based on their needs
- Focus, to make it actionable
- Maximize chance of “surprises”
- Refine till it gets to the heart of the issue
- Keep it simple and humanistic

Don't

- Just be an order taker
- Use a question from the wrong phase (expand / contract)

Part 3 is done when they can explain to you **how the questions will lead to insights to support the decisions**

Good:



“When we try to love or serve without understanding those whom we are serving, we often end up harming society and ourselves.

In order for service to be beneficial, it needs to go hand in hand with discernment. This is the essence of sustainable development.”

Amma (Sri Mata Amritanandamayi)
2015 UN Academic Impact Council



Happy to take questions
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