



Packet 2:

BizLab Research Methods & Tools

Sarah Bloomer, Experience Strategist

Ted Fuller, Business Technology & Analytics Lead

Nancy Mann, Experience Designer

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Research Tools and Methods

Background

Packet 2: BizLab Research Methods and Tools is a collection of methods and tools we believe are effective for research on a BizLab project. Each cohort station team working with BizLab had two months in which to complete Discovery Research, during which we worked together to identify the best methods and tools for your idea and target audience. The details of how this process worked is in *Packet 1: The BizLab Method*.

During the project we only provided you with instructions for the methods your team would use. With this Packet, we are giving you all the methods we considered and have used with other stations. This packet, along with *Packet 3: BizLab Analysis Methods and Tools*, gives you the full range of research methods and tools you might like to try in future projects. We hope you will use this as a resource in future projects whenever you need to understand your audience.

Overview

Choose the right methods for face-to-face interviews



Figure 1: Sarah Bloomer research toolkit

One of the keys to the success of your BizLab project will be using the right research tool for the context and research goal. Descriptions and instructions for the tools and methods we're likely to recommend are below.



Goal of Research

- Gain deep understanding of your audience/customer.
- Synthesize the findings into insights.
- Use the insights to refine your ideas.

In Packet 1 under “Design your Discovery Research Activities” we outline some of the challenges of choosing who to talk to and how to find those audience members. Once you choose your audience, you then choose the method and tools.

At the end of this packet, on page 21 read “Recruit People to Interview,” where we suggest potential ways to recruit people for face-to-face interviews.

Research Methods and Tools

Tools and methods are used side by side. For example, you might use a collage (a tool) in a workshop (a method). A tool may have a method associated with it such as creating a journey map with cards.

Note:

The methods in this Packet are organized alphabetically – not in order of preference or chronologically. Affinity diagramming is at the end since it’s an analysis tool often used for short term analysis during research. Although covered in Packet 1, “recruit people to interview” is also included here where you might need it.

Research tools and methods

Use these with your audience

- Bullseye diagrams
- Café / Guerilla interviews
- Cards
- Collages
- Desk research
- Diary studies
- Face-to-face interviews
- Intercept interviews
- Phone interviews
- Storytelling
- Workshops

Supplemental methods

- Recruit people to interview
- Affinity diagrams (for early synthesis)

Bullseye diagrams

Tool: Best in a workshop setting with a group of participants.

By design, a Bullseye Diagram puts a limit on how much you can identify as critical. It forces your participants to consider what is most important, without ranking one by one. I usually request that one

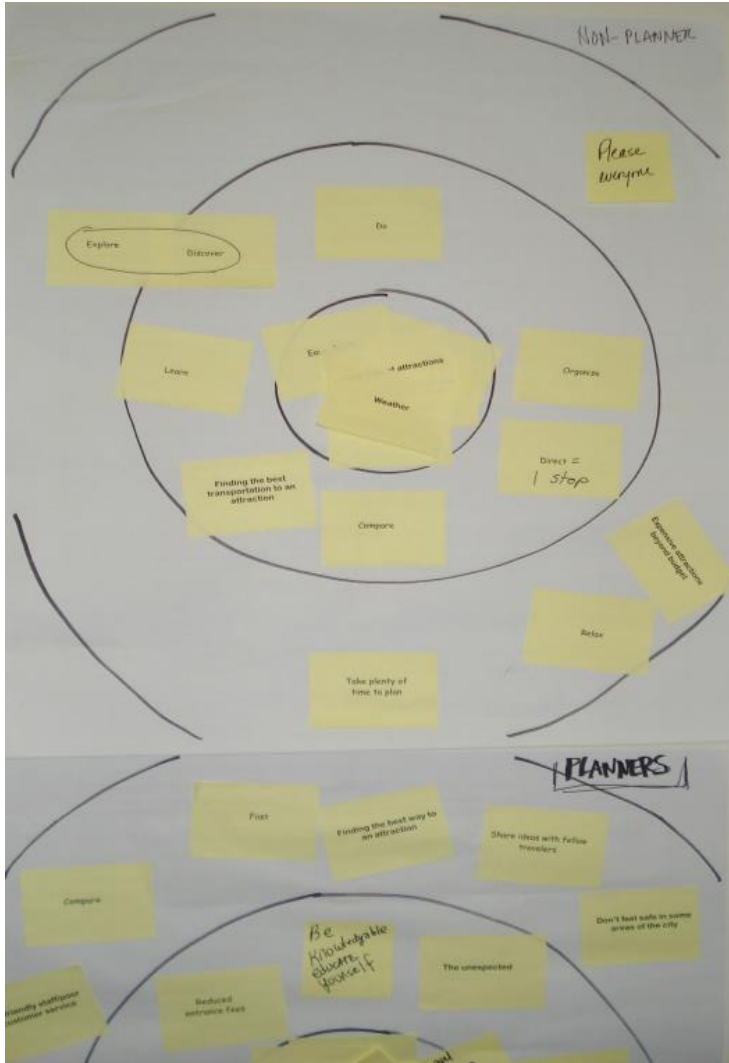


Figure 2: The example is from a travel planning site design workshop. The group was divided into Trip Planners and Trip Non-Planners, who, given the same sticky notes, were asked to rank what was most important when planning a trip.

item goes into the center, with everything else falling into the next two rings.

Each successive circle is larger than the bullseye, forcing participants to carefully consider what’s critical, what’s important and what’s peripheral. It’s a ranking system done visually rather than numerically.

You could use a bullseye diagram to explore values or motivations of your audience.

Approach 1:

Prepare ONE bullseye diagram.

Ask your participants to write down up to 10 sticky notes with a specific theme in mind.

Then, ask them to work together to put the sticky notes on the bullseye.

Finally, the facilitator takes 5 minutes to organize for similarities, themes and outliers. Review with the room to explore the themes in greater depth.

Approach 2:

Prepare 2-3 bullseye diagram templates.

Give each participant an identical set of printed sticky notes.

Divide the participants into groups based on similar attributes — e.g. members and non-members. Have group complete their own bullseye.

Useful Reading

Mural: Bull’s Eye Diagramming. <https://mural.co/framework/bulls-eye-diagramming>

Café interviews / Guerilla research

Method: Informal interviews with the general public in popular gathering places.

Use when: You don't need a specific type of person (the general public will do) and you have little or no time to recruit.

Café research interviews became popular when Lean Startup encouraged startups to “get out of the building” and talk to target users. Long before Lean Startup, however, there was “guerilla” research.

Both Café and Guerilla share a common goal: find users out in the world and speak with them. This might be in a café, a shopping mall, at a station event, or even on a busy street.

Set up

Prepare by having a very brief set of questions — 3 is a good number. We'll help you craft the questions. People are in the middle of doing something else and won't have time for a long conversation with a stranger. Make sure you're wearing a badge with both your name and the name of your organization. Dress neatly and appropriately for the venue.

At the venue

Start by introducing yourself, asking for [x] minutes of their time and explaining why you are conducting the research. Most will decline, but that's OK.

Remember to write the responses to each question. A form — either on an electronic device or on paper — for this purpose will help.

After the study

Be sure to transfer your written to sticky notes quickly, if you didn't do sticky note notetaking during your walkthroughs. Then use affinity diagramming to work through your findings.

Useful Reading

UX Booth: The Art of Guerrilla Usability Testing

<https://www.uxbooth.com/articles/the-art-of-guerrilla-usability-testing/>

UX Mastery: Popular Guerrilla UX Research Methods.

<https://uxmastery.com/popular-guerrilla-ux-research-methods/>

Cards

Tool: A simple low fidelity tool for getting participants talking about what's in their heads.

Printing cards to capture input from your audience is an excellent way to get a conversation going.

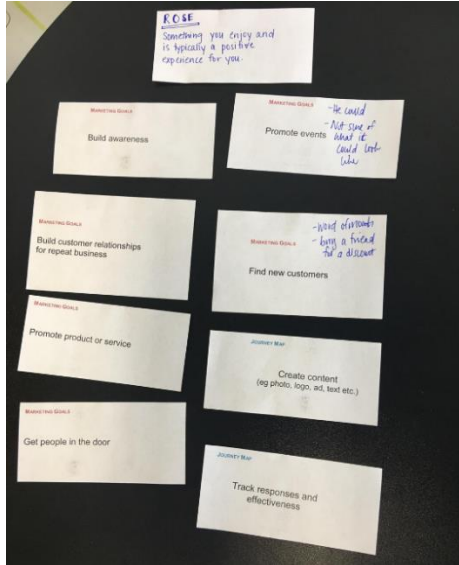


Figure 3: Print cards on business card paper. Allow users to write on their own.

We use cards as thinking tools. Printed words on business cards provide a powerful tool to drive conversation.

Cards provide words or ideas to which participants can respond. When the right words or ideas are not included, have them write on blank cards. Take a photo of the final card sort with your smartphone. Here are six card sort methods:

Selection: Print the Emotion list on business cards and ask your audience to select the 3 that best describe how your station makes them feel. Ask them to discuss as they discard cards.

Matching: Use two groups of cards, e.g. Activities and Emotion cards and match them up.

Alignment: Create cards that represent your business goals and sub-goals, and cards that represent your audience or corporate groups. Align emotions with activities.

Grouping: Affinity diagramming of findings to discover the themes.

Roses & Thorns: Using 3 sheets of paper draw a happy face on one, a frowning face on the next and neutral on the third. Ask participants to sort cards based on how easy or difficult each activity is. This generates a rich discussion.

Journey maps: Have the cards represent different a step in a process and ask participants to lay them out left to right in order. Cards can be stacked if activities happen concurrently.

Printing cards or sticky notes **Business cards** — use Avery 5371, 2" x 3.5" perforated, heavyweight cardstock. Using heavyweight stock allows you to use them with several participants.

Sticky notes — yes, you can print onto sticky notes.

<http://www.ourelementarylives.com/2016/09/how-to-print-on-sticky-notes-in-3-easy.html>

Online card sorting tools

Mural.com — Collaborative card sorting <https://mural.com>

Miro — Collaborative card sorting <https://miro.com/>

3M Post-it Plus App — https://www.post-it.com/3M/en_US/post-it/ideas/plus-app/

Optimal Sort — asynchronous sorting. Set up cards and send out the activity to a list of participants. Provides analysis tools within the app.

<https://www.optimalworkshop.com/optimalsort>

Collages

Tool: Participants create a pastiche of images and words to surface experiences and emotion.

Collages are created by participants using photos and images from magazines. A collage can be large (poster size) or small (8.5 x 11).

Collages are used as stimuli to understand a participant's experience. Often applied with focus groups and in workshops, collages bring experiences alive. They enable participants to tell their story and describe their experiences while communicating emotions and desires through the images. *[Also see Storytelling page 18]*

Participants can create their collages before coming to a focus group, or you can have them create them as part of a workshop.

You could ask:

- What does [station] mean to you?
- What role do podcasts play in your life?
- What would your life be without [station?]
- Create a timeline of your listening habits and what it means to you at different points in the day.

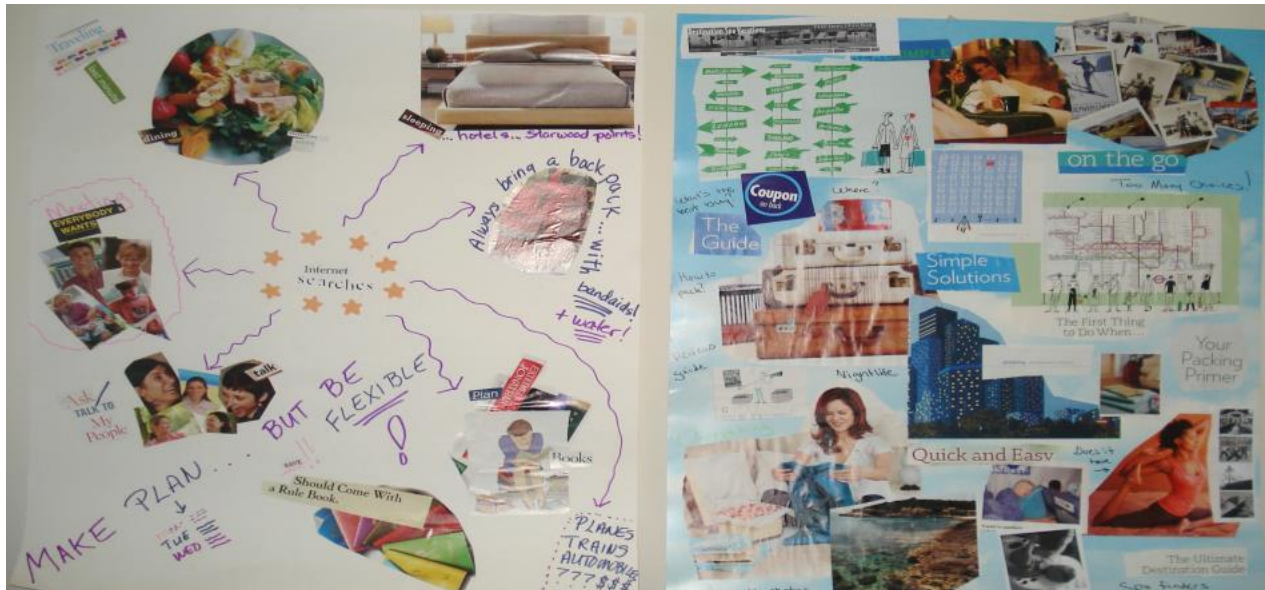
Collage Instruction

1. Ask participants to use cutouts from magazines and other sources and affix the cutouts on poster board. Include words that describe the experience — be creative! There's no right way.
2. Have participants create their collages either before they attend a workshop/focus group or have them create the collage as a workshop activity. If in a workshop, you'll need at least 45 minutes for the activity.
3. When all collages are complete, have each person share their story with the focus group.
4. You may also need to reimburse them for poster board and glue.

During the workshop

1. Ask participants to present their collages to the group, one at a time
2. As they are presenting, have the group capture key words on sticky notes, one idea or work per sticky. Words should capture emotions, barriers, pain points, opportunities
3. Group the words in an affinity diagram to capture the themes across all collages
4. Discuss the themes to gain deeper insights into their overall experiences

The examples below are from a focus group with travel planners. They were asked to recall a recent trip and capture their planning experience through the collage.



Useful Reading

IDEO Design Kit: Collage

<https://www.designkit.org/methods/25>

Kyle Soucy: Collaging: Getting Answers To The Questions You Don't Know

To Ask <https://www.smashingmagazine.com/2012/02/collaging-getting-answers-questions-you-dont-know-ask/>

Desk research

Method: A way to collect secondary, or existing, research or data related to your idea or audience.

Desk research is done on your computer these days, typically trawling the internet for existing research or information about your target idea. Desk research is strictly for **preparing** for your face-to-face interviews. This gives you a head start before you embark on new research. It will help you formulate good questions for face-to-face interviews.

Choose your sources

Some sources may exist within your own station:

- Membership surveys
- Google analytics tracking and metrics of your website or digital apps

Other sources may be related but external to your station

- Chamber of commerce data about local businesses for potential sponsors
- Demographic data about a target population
- Research done about public media such as the Membership Puzzle
- Existing archetypes / personas
- Social media: Instagram, Facebook and Twitter can be used to investigate issues such as how often a particular topic is discussed or what key issues or barriers are front of mind. Use hashtag topics to search, e.g. #publicmedia.
- More public media specific resources are listed below.

Capture your findings

1. Set up a spreadsheet to track your sources.
2. Option 1: You might put your questions into columns to allow you to easily scan what different sources say.
3. Option 2 (scrappier): write down what you learn on sticky notes. Color code by source. Begin to group the findings each time you do more desk research. Note: you might put these on a roll of paper or flip chart so that you can move it to another room. This is useful if you are dividing up the research or plan to sort the findings in a group.

Useful Reading

User Focus: Desk Research — The what, why and how.

<https://www.userfocus.co.uk/articles/desk-research-the-what-why-and-how.html>

This is Service Design: Secondary Research

<https://www.thisisservice.designing.com/methods/secondary-research>

Sample sources

Membership Puzzle Project <https://membershippuzzle.org/>

National Public Media: Audience

<https://www.nationalpublicmedia.com/audience/>

Greater Public: Annual NPR Audience Profile

<https://www.greaterpublic.org/resources/npr-audience-profile/>

American Press Institute: News Subscriber Archetypes

<https://www.americanpressinstitute.org/publications/reports/survey-research/news-subscriber-archetypes/>

Diary studies

Method: Takes a while to do and to synthesize, and can provide insight into valuable real world, in-the-moment experiences over time.

A diary study is a big undertaking but the results, when used appropriately, can be rich and insightful. Only consider a diary study if you have someone to dedicate time to managing the study, and you have enough time to set it up.

One application might be to ask station members to record when and how they listen to broadcasts or podcasts during the day and why. Another might be to learn what other channels members are using to get their news/weather/local events/etc. Ask them to jot down how they get their news during the day, where it comes from and what they are doing at that moment in time.

This is a good way to understand *context of use*, to *answer why questions* and *capture emotion*.

A research question might be:

- How are different age groups getting their news? (a diary study may provide better insights into this than a survey which relies on memory, not real time action)
- Why are they using one device over another (you might learn from Google Analytics that 25-40 year olds are primarily using their smart phones and you want to find out why)
- Are there times or ways our audience would like to hear our content but cannot?

Experimenting with diary studies

Diary studies are a type of longitudinal study, that is, a study that happens over a period of time. The benefit of a longitudinal study is that you capture peak usage, variations and other behaviors. It also allows you to capture first time experience and how an experience changes over time.

Data you might collect include:

- When do listeners listen in the car, at home, at the gym?
- What else is happening when they listen?
- What are they thinking and feeling at those different points?
- What gets in the way of their listening or engaging?

Note: You need several weeks to design, set up and run a diary study. This is not a quick method.

You also need to manage the study, that is, track if people are engaged in the activities that you've asked them to do. A diary study facilitator sends reminders, answers questions and encourages participation which is essential to success.

Steps:

- Design the study.
- Assign a diary study facilitator whose job is to track engagement and encourage participation.
- Determine the length of the study (eg 1 day, 3 days, 5 days)
- How the data will be collected (a form to complete each day, send text messages at specific times. A follow up interview at the 50% point and final day, for example)
- Establish who to recruit, how to recruit

- Set an incentive or remuneration. It works best to offer something up front (eg \$50 gift card) and at the time of completed (\$100 gift card).
- Implement the study – this means monitoring the recruits and pushing them if you’re expecting a response at a specific time which hasn’t arrived.

Useful Reading dScout: Diary Case Study with Bose. <https://dscout.com/people-nerds/bose-research-fieldwork-and-experimental>

UX Mastery: Diary Studies — Extending your UX Research [3 min video]
<https://youtu.be/0awvMAcON-w>

Face-to-face interviews

Technique: Talking directly to participants can yield rich insights. Requires recruiting and planning.

Face-to-face interviews give you an opportunity to use tools for data collection, such as card ranking or storytelling. You can hold interviews in person or via an application like Skype. While interviews are easier in person, online interviews use similar tools by applying clever uses to existing tools. For example, you might use a bullseye diagram by asking the participant to create a list of words about a particular topic, and then ask them to describe where on the bullseye to place them. You could build the bullseye on a shared screen. You can also leverage collaboration tools such as Mural or Miro.

All interviews need to be planned and designed.

1. Define the questions you are aiming to answer.
2. Consider doing Desk research to develop your questions.
3. Select the people you'd like to interview.
4. Determine the best way to find those people and meet with them.
5. Create a discussion guide.
6. Recruit and schedule.
7. Run the interviews. Have another take notes or record the session (with permission.)
8. Afterwards, review your notes and capture the topmost findings for when you do the analysis.

Interviewing tips:

Make sure you ask open-ended, unbiased questions. For example:

Bad: Would adding XYZ functionality be helpful to you?

Good: How would you feel about XYZ functionality being added?

Bad: How did you like the onboarding process?

Good: What did you think about the onboarding process?

Sarah's favorite probing questions:

Tell me more about that.

It sounds like you feel [repeat back what they said.]

Why? Why? Why? Why? Why? (5 Whys)

Useful Reading

UX Army: Developing questions for your qualitative user research

<https://medium.com/uxarmy/developing-questions-for-your-qualitative-user-research-a4d2b2127db3>

Nielsen Norman Group: User Interviews

<https://www.nngroup.com/articles/user-interviews/>

Harvard UX Group: UX Research Guide Sample Questions for User Interviews

<http://projects.iq.harvard.edu/files/harvarduxgroup/files/ux-research-guide-sample-questions-for-user-interviews.pdf>

Kanbanize: 5 Whys: The Ultimate Root Cause Analysis Tool

<https://kanbanize.com/lean-management/improvement/5-whys-analysis-tool/>

Intercept interviews at events

Technique: Similar to guerilla research. For BizLab projects, use intercept interviews at events that you host or participate in.

If you have an event coming up, and have permission to speak with attendees, an intercept study might be a good solution, giving you quick access to your audience. To ensure good data, intercept interviews should not be random. Be clear who you wish to speak to and find participants who will give you trustworthy data.



Before the event:

1. Create your goal and identify the target group or groups you'd like to speak to.
2. Prepare your discussion guide or script.
3. Determine the ideal number of people to speak with.
4. Select the best way to collect data: take notes; record the conversation *with permission*; or fill out a Google form you created beforehand on a tablet.
5. If you have any swag to hand out as a thank you, find it and bring with you.

At the event:

1. Identify a potential participant.
2. Introduce yourself — if you have an official badge or nametag, that will help.
3. Ask their permission to participate in research.
4. Capture key information to help with later analysis.
5. Administer the interview or observe them engaging with a prototype.

After the event:

1. Review the interviews.
2. Write key findings down on sticky notes, one idea per sticky note.
3. Group the findings on a wall.
4. Walk the wall with a team member if you've done the interviews alone. Explaining the findings helps you find holes in your synthesis.

Useful Reading

Intercept Studies: <https://blinkux.com/ideas/tips-tricks-intercept-studies>

<https://www.slideshare.net/UPABoston/intercept-them-in-the-wild-recruiting-hardtofind-participants>

<https://www.smashingmagazine.com/2016/02/the-art-of-the-intercept/>

Affinity Diagramming: <https://www.nngroup.com/articles/affinity-diagram/>

<http://opim.wharton.upenn.edu/~ulrich/documents/ulrich-KJdiagrams.pdf>

Phone interviews

Technique: Talking directly to participants can yield rich insights, even when over the phone or an online meeting app. Requires recruiting and planning to be effective.

Online or phone interviews give you an opportunity to engage directly with your target audience and hear their stories or ideas in real time. Unlike face-to-face interviews in person or via an application like Skype or Zoom, you cannot use any interactive tools such as cards or shared screens. Notetaking is therefore paramount, and a phone interview should always include both an interviewer and notetaker.

All interviews need to be planned and designed.

1. Define the questions you are aiming to answer.
2. Select the people you'd like to interview.
3. Determine the best way to find those people and meet with them.
4. Create a discussion guide / script.
5. Recruit and schedule.
6. Run the interviews. Have another take notes or record the session (with permission.)
7. Afterwards, review your notes and capture the most important findings for when you do the analysis.

Discussion Guide / Script design:

Remember that this is a conversation that needs to happen within a constrained time period. Allow for rich responses by creating core questions and optional questions. The idea is to guarantee the core questions will be answered, and the option questions are bonus.

1. Introduce yourself *and the notetaker*; reiterate the purpose of the interview.
2. Ask a few demographic questions as warm up and to build rapport (and to capture "slice & dice" data.)
3. Structure questions which focus on the goals of the interview (it's easy to ask a large amount of questions as if this is a survey. Instead, aim to ask questions which will yield a rich, qualitative response.)
4. Probe when the answers are too high level or there seems to be more to be said. You can include potential probe questions in the script.
5. Close with any Likert scale questions (if you're using them.)
6. Thank the participant and confirm email address if providing an Amazon gift card.
7. Send a follow up email thanking them for their time.

Interviewing tips:

Make sure you ask open-ended, unbiased questions. For example:

Bad: Would adding XYZ functionality be helpful to you?

Good: How would you feel about XYZ functionality being added?

Bad: How did you like the onboarding process?

Good: What did you think about the onboarding process?

Probe with open-ended questions:

Use open-ended phrases like "Tell me about", "Describe a time when you..."
"Explain when you..."

Tell me more about that.

It sounds like you feel [repeat back what they said.]

Why? Why? Why? Why? Why? (5 Whys)

After the first few interviews:

Review the outcomes with your notetaker and/or team and tighten up the script. Some questions may not be useful, and new questions may arise. Given the small numbers and tight timeframe, make the best use of time talking to your audience by being flexible.

Useful Reading

UX Army: Developing questions for your qualitative user research

<https://medium.com/uxarmy/developing-questions-for-your-qualitative-user-research-a4d2b2127db3>

Nielsen Norman Group: User Interviews

<https://www.nngroup.com/articles/user-interviews/>

Harvard UX Group: UX Research Guide Sample Questions for User Interviews

<http://projects.iq.harvard.edu/files/harvarduxgroup/files/ux-research-guide-sample-questions-for-user-interviews.pdf>

Usability Book of Knowledge: Phone Interviews

<https://www.usabilitybok.org/phone-interview>

Storytelling

Technique: Best in a workshop setting with a group of participants. Storytelling allows you to hear stories, and other participants' response to that story.

Storytelling is an effective way to capture your target audience's experience. Not only do you capture steps taken and tools used, but you also capture the emotion, pain-points, barriers and facilitators.

Ask participants to tell us a story about a specific experience. This is often done in workshops, where participants share their stories with each other. When they share their stories with each other, they empathize with each other and additional ideas and input surfaces.

Set up:

1. Post a long sheet of white paper (ideally 36" wide) on the wall.
2. Create a line down the middle, with a happy face at the top, and a sad face below. Good experiences are placed above the line, the higher the better.



Beginning

End



On the day:

1. Give participants different colored sticky notes if you will have multiple stories on the same chronological line (in the example below there are 3—one person is yellow, the second is blue and the third is yellow with dots.)
2. Each tells their story while placing the notes in chronological order, above the line or below to show their overall experience at each point.



Instructions to participants:

1. Write each step in the story on a sticky note (one step per sticky note.)
2. Start from the moment the activity was triggered (e.g. I received a notification about an upcoming event) and continue until the activity is completed.
3. Place sticky notes on the prepared sheet of paper, working from left to right chronologically. Tell us the story as you put each sticky along the line.

- Useful Reading** Rosenfeld Media: Storytelling for user scenarios.
<https://rosenfeldmedia.com/books/storytelling-for-user-experience/>
- Whitney Quesenbery: Storytelling — finding the insights in research data
<https://www.slideshare.net/whitneyq/storytelling-finding-the-insights-in-research-data>

Workshops

Technique: There are many different flavors of workshops. Getting a group together has many advantages. Requires recruiting and a good space. Co-create with your target audience.

Use when: You don't have a lot of time to run separate interviews. You have a meeting space and group of participants. Or if you feel a group will yield a better result.

An efficient and effective way to learn from your target audience is to hold a workshop. Unlike a focus group or a panel where participants answer questions individually, a workshop is a structured meeting with collaborative activities.

Adding activities and structure to the workshop saves you time analyzing later, and it also enables participants to “jam” off each other as the techniques include additional depth.

Set Up

- Invite 5-10 people (diversity is good: new/existing, young/old, male/female/other.)
- Create an agenda.
- Agree on facilitator and notetaker for the sessions. Assigning a notetaker is a must.
- Set up the room (long paper, sticky notes, sharpies, colored dots if capturing pain-points.)
- Provide food and drinks.

Possible techniques to use with participants:

Cards: Print out cards beforehand and have them on hand at the workshop. I have also done this by printing on sticky notes. *See description under Cards.*

Bullseye diagrams: Pick a topic. Create a 3-ring bullseye diagram on flipchart paper. Ask participants to write down 6-10 sticky notes around the topic. They can then put the single most important in the center, then spread the next in the remaining rings. It's a loose ranking tool. You can see themes and differences. *See description under Bullseye diagrams.*

Collages: Can be completed during a workshop or ahead of time. *See description under Collages.*

Storytelling: Using a 36" wide roll of paper and painters' tape (or draw on a whiteboard,) create a timeline with a smiley face above the line, and a frowning face below. Participants relay a story (e.g. the last time I attended a WBUR event) using sticky notes, placing the notes in high if very happy, and low if very unhappy. *See description under Storytelling.*

Love letters and break-up letters: Don't ask participants what they like or don't like about a particular product or service. Instead, have them write a love letter or a break-up letter based on real-life experiences and interactions. This is an effective way to capture motivations, values and emotions of your audience. *See Useful Reading below.*

Note: Work with Sarah to create an agenda and plan your workshop.

Useful Reading

UX Design: Loves me, loves me not. <https://uxdesign.cc/loves-me-loves-me-not-102d8eda29a>

Recruit People to Interview

Once you decide *how* you're going to get in front of actual members or businesses, you need to find them and schedule time with them.

Even if you plan to talk to people at a scheduled event or activity, you must plan how to interact with them—whether to schedule ahead of time or intercept them in the moment.

1. Identify the way you want to interact with your target audience to address your learning goals
2. Be sure to outline exactly the types of people you wish to speak to based on your targets. Develop a “screener” together with Sarah.
3. Consider how much research time you have— this will influence which method is selected.

Recruiting for one-on-one interviews

Planning face-to-face interviews or a workshop means you need to recruit and schedule people, which is time consuming. There's a lot you can do without hiring an expensive recruiting service.

Look for quick ways to reach a broad range of people to talk to:

- Work with your membership organization.
- Recruit via your website, Facebook page or Twitter account (if permitted by editorial.)
- Reach out to “family & friends,” that is, people you know who meet the recruiting requirements.
- Offer a “thank you” gift, which could be as simple as stickers or a gift card.

One-on-one interviews

When planning to meet people at a set time, here are a few tips:

- When you send an outreach email, be descriptive about the session and offer specific times available. Ask them to choose two that work for them.
- Consider meeting for only 30 minutes for phone interviews and an hour for in-person interviews.
- Confirm the time and nature of the meeting by email (eg in person, at what location etc.) and leave no detail to chance.
- If meeting by phone, consider using a conference call number rather than your personal phone number. This is essential when both the interviewer and notetaker are also remote (eg a station team member does the interview from one location, while BizLab takes notes from Boston).
- When meeting in person, bring no more than 2 people to the interview. One person is the interviewer, the other the notetaker.
- Follow the interview with a thank you email. If you have offered the participant a thank you, such as an online gift card, follow up within 24 hours.

Workshops / Focus Groups

Bringing a group together takes planning, and also an efficient approach that allows you to learn more, as participants interact with each other as well as with you. In the workshop, you'll use specific tools and methods to collect data in a way that help surface findings quickly.

Schedule at least 2 hours.

Plan to provide a thank you gift such as station swag at the event.

Finding people in crowds

Café studies

Café studies (also called guerilla research) became a popular way to reach the public by startups using the Lean Startup approach. If you are seeking new audience members, this might be a cheap and dirty way to find people within your target audience. *See description under Café / Guerilla interviews.*

Intercept Interviews

Intercepts are similar to café studies. Consider using intercept interviews at an event that provides access to people already familiar with your station. Since interviews are short, a good script is essential. Create up to 5 questions that allow for a wide variety of answers. Avoid those that lead to a “yes/no” response. Include an aspect of *why* in the question or ask why as a follow-up during the interview. *See description under Intercept Interviews.*

Useful Reading

User Interviews: [How to write screener surveys to capture the right participants.](#)

UX Mastery: [How to write screeners for better UX research results.](#)

Rosenfeld Media: [Portigal Consulting Sample Screener.](#) [Note: this example is more complex than we will need, but shows what a full blown screener looks like]

BizLab: Packet 2: Research Methods and Tools

BizLab: Packet 3: Analysis Methods and Tools

Recording the sessions

You can record the session using a smart phone, a camera or via an online tool such as Zoom or WebEx. These are only useful if you plan to return to them for notetaking, or to have a team member review them later.

Important Note: If you plan to record anything, you **must get formal permission** from the participant. You can do this by having each participant sign a simple permission slip or by capturing their verbal granting of permission at the beginning of the audio or video. Explain that they are signing to hold *you* accountable, and that the recording is to give you the opportunity to review the interview and will not be shared outside of your station.

Affinity diagramming

Method: This research analysis method is both efficient and collaborative. You can use it to surface findings from any type of research interview. Affinity diagramming works best when multiple team members have collected information and build the diagram together.

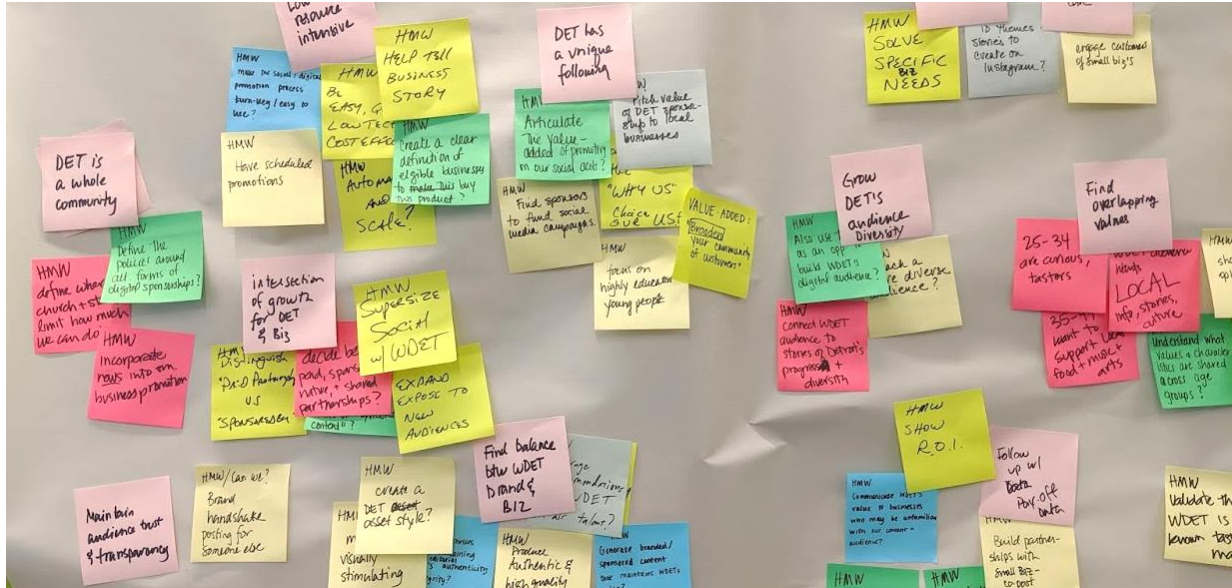


Figure 4: Grouped sticky notes, with grouping headings in pink.

Affinity Diagramming is one of the best methods for making sense of unstructured, qualitative data such as written notes from a face-to-face interview.

Affinity Diagramming is a fancy name for grouping things together. It involves lots of sticky notes, group participation, and a facilitator. The goal is to share information gathered in interviews and achieve a collective understanding of the most important findings -- **essentially you want to surface findings and insights, not group items into categories.**

A typical Affinity session requires a facilitator to set up the room, run the meeting, and summarize findings. But you can also do it simply by bringing together everyone involved in a qualitative data gathering session such as 1:1 interviews, intercepts, workshops or grouping free text in surveys.

Materials needed:

- 4-6 feet of craft paper
- Blue masking/painters tape
- Sticky notes in different colors
- Black sharpie markers
- White board or flipchart

Set up (after interviews are completed):

- Invite all interviewers and anyone with a stake in the outcome to a meeting—one hour for a small research study, two hours for a large one with many participants.
- Choose a meeting room or hall area with blank wall space.

- Set up the space as follows:
 - Tape the craft paper to the wall.
 - Distribute sharpies and sticky notes for meeting participants.
- Ask each interviewer to bring their notes to the session.

During the session:

- Facilitator reviews agenda.
- Each interviewer reads through their notes and pulls out 5 or more high level findings. Findings are participants' answers to questions or comments that are repeated by a significant number. What assumptions were confirmed? What was surprising? Eg "Gets their new on Facebook" or "Visits website every Thursday to plan the weekend."
- Each person writes a finding on a sticky note, one finding per note.
- One-by-one, each person puts their notes on the board, moving similar items next to one another. Try to avoid grouping in categories. For example: are there barriers to some activity? Are there shared feelings about something? Are there workarounds?
- When done, the facilitator walks the board: This means summarizing each group and asking "So what?" For example, "all these sticky notes are about how listeners feel about WXYZ. So what?" If the feelings in the group are not the same, the theme might be: "listeners' feelings about WXYZ are mixed."
- Facilitator circles each group, or places a new color sticky note above the grouping, writing the theme / finding written on it based on the discussion.

After the session:

- Take pictures of the affinity diagram.
- Distribute findings or just the themes to meeting participants.

Documenting the outcomes

There are several ways to document the outcomes:

- Write up the headings, and summarize the key findings captured by the sticky notes.
- Prioritize the headings to help determine what action to take.
- Write up all the details, including each sticky note (best done in a spreadsheet.)

Useful reading Nielsen Norman Group: Affinity Diagramming for Collaboratively Sorting UX Findings and Design Ideas.

<https://www.nngroup.com/articles/affinity-diagram/>

Center for Care Innovations: Catalyst Method: Affinity Clustering

<https://www.careinnovations.org/resources/catalyst-method-affinity-clustering/> [includes a good 6 minute Vimeo on how to cluster qualitative data]

**Remote
collaboration**

There are many online collaborative tools to create anything that requires sticky notes.

Here are two:

- Mural.com
- Miro.com

Glossary

Most of the following methods and tools can be found in Packet 2: BizLab Research Techniques and Packet 3: Analysis Methods & Tools.

Technique	Research	Analysis	Experiment	Definition
Workshops	✓		✓	Bring a group together to co-create or co-discover.
Cards	✓			Using cards to understand people’s thinking. Card sorting, clustering, ranking, alignment etc.
Face-to-face interviews	✓			Pre-scheduled interviews with target audience, either in person or via live video meeting.
Café / Guerilla interviews	✓		✓	Finding audience members “in the wild” for interviews or rapid testing.
Intercept interviews	✓			Finding audience members at specific locations or events as they engage in an activity you are studying.
Bullseye diagrams	✓			Ranking framework.
Collages	✓			Tool for capturing emotion and experience of an existing activity.
Storytelling	✓		✓	Enable audience to tell their story using a targeted framework.
Survey	✓			Quantitative tool. Surveys collect data over time or capture specific input. Use to validate findings from interviews or as a source of indicators to direct qualitative research.
Diary studies	✓			Gaining insights on the day to day experiences of a target audience. Diary studies can be expensive—can we figure out some cheap and dirty approaches?
Data analysis		✓		Slicing and dicing data to find patterns.
Research walls		✓		A means of sharing ideas, sources of inspiration, and/or thoughts across teams.
Empathy maps		✓		Framework for capturing what a target audience member is thinking, feeling, seeing and doing when engaged in a specific activity. <i>Developed by XPlane.</i>
Empathy walls		✓		A wall covered in empathy maps.
Experience narratives		✓		Stories written from a persona point of view which describes a current or future experience. Sometimes these are created as storyboards.
Double diamond	✓	✓	✓	Framework for creative work adapted by innovation approaches. Explore the problem before engaging in design. “Flare” before you “focus” to consider a broad range of alternatives. <i>[d.school terminology]</i>
Lean Startup	✓		✓	An approach to product development created by Steve Blank and Eric Ries. Startups are “learning organizations” in search of a business model.
Jobs to be Done (JTBD)	✓	✓		An innovation approach pioneered by Anthony Ulwick and Clayton Christensen. The idea is that people are outcome driven more than grouped by demographics.
Learning targets	✓		✓	A teaching tool appropriated to experimentation. Identify what your experiment is trying to learn.

Technique	Research	Analysis	Experiment	Definition
Personas		✓		An archetype of the target customer or member.
User Walkthroughs	✓		✓	Formal or informal walkthrough of a service or product by the target end customer.
Hypothesis	✓		✓	Taken from the scientific method, a hypothesis describes the thinking behind an idea.
Assumptions		✓	✓	Assumptions describe the ideas and assumptions behind a design or hypothesis, e.g. "We assume 70% of members are interested in intergalactic travel"
Success metrics	✓		✓	Success metrics are used in a hypothesis to describe how you'll know your experiment was successful. <i>Also see KPIs and OKRs (Key Performance Indicators, Objectives and Key Results)</i>
Design thinking	✓	✓	✓	Continually exploring the problem space through every phase of research and experimentation. <i>Also see d.school process.</i>
Empathy	✓			Step 1: d school design thinking method "Empathy is the foundation of human-centered design. The problems you're trying to solve are rarely your own, they're those of particular users. Build empathy for your users by learning their values."
Define		✓		Step 2: d school design thinking method "The define mode is when you unpack your empathy findings into needs and insights and scope a meaningful challenge." Part of the BizLab: 3-day workshop
Ideate		✓		Step 3: d school design thinking method "You ideate in order to transition from identifying problems to exploring solutions for your users." <i>Part of the BizLab: 3-day workshop.</i>
Prototype			✓	Step 4: d school design thinking method "Prototyping gets ideas out of your head and into the world. A prototype can be anything that takes a physical form—a wall of post-its, a role-playing activity, an object. In early stages, keep prototypes inexpensive and low resolution to learn quickly and explore possibilities." <i>Also: MVP</i>
Test			✓	Step 5: d school design thinking method "Testing is your chance to gather feedback, refine solutions, and continue to learn about your users." <i>Also: Experiment</i>
Discussion guide	✓		✓	A set of questions that the researcher uses to maintain focus and consistency across participants during research
Field notes	✓			Written and visual notes and recordings of what the researcher observes.
Stimuli	✓		✓	Tools, sketches, images, concepts, prototypes, or other tangible items used to elicit feedback from the participant during research or experimentation.
Screeners	✓		✓	A questionnaire designed for recruiting. Questions that represent the attributes and characteristics of the people you wish to recruit.

Appendix

Potential items to print on Cards or probe for during interviews. These lists should also prepare you for **what to listen for** during your interviews.

Values / Jobs to be Done*

- Support something I think should exist
- Stay up to date / being in the know
- Consume quality content
- Consume trustworthy content
- Intellectual improvement
- Professional development (teacher, student, professor, professional, artist/musician)
- Uniqueness (I can't get this anywhere else)
- Access to NPR vs local news/issues
- Interact with the station (reporters, as a volunteer, attend events that connect me with station personnel)

Emotional Jobs*

- Sense of belonging / community
- Sense of identity / alignment to values
- Understood
- Appreciation
- Appreciated
- Concerned
- Sense of duty / responsibility
- Escapism
- Pleasure
- Inspiration
- Curiosity
- Public radio as activism
- Connected (to the world)
- Intelligent / knowledgeable

* *These examples are drawn from WBUR's Let's Talk Survey¹ and the Membership Puzzle Project²*

Obstacles

- Expectation (but it's free!)

¹ <http://publicradiobizlab.org/wp-content/uploads/2018/08/WBUR-Lets-Talk-Survey-Opportunity-Report.pdf>

² <https://membershippuzzle.org/>

- Lack of time
- Scheduling
- Location
- Context (listening while driving)
- Income
- Cost
- Technology

Interaction

- Listen
- Read
- Respond
- Attend
- Volunteer
- Participate
- Contribute
- Connecting
- Discovery

Process

When exploring a process, print cards with the process steps and outcomes. Ask owners to map out their process. For example, a small business's marketing activities might include:

Example steps:

- Set budget
- Set up marketing plan for the year
- Figure out where and how to promote
- Create content (e.g. photo, logo, ad, text etc.)
- Place ad
- Pay for ad
- Track results

Example marketing goals:

- Find new customers
- Build customer relationships for repeat business
- Promote events
- Promote product or service
- Build awareness

Questions?

Sarah Bloomer, Experience Strategist

sarah@sarahbloomer.com

Ted Fuller, Business Technology & Analytics Lead

tdfuller@wbur.org

Joan DiMicco, Executive Director

jdimicco@wbur.org

WBUR BizLab

WBUR's BizLab is an innovation lab developing and testing new models of support for public radio. Operating as a lean startup, BizLab is a team of product managers, experience designers, and business analysts. We work with public radio stations to uncover new avenues for revenue generation, distinct from traditional approaches including on-air drives, direct mail, and underwriting.

WBUR, Boston's NPR News Station, created BizLab in 2015 believing it is critical that public media invest in innovation and experimentation to identify new revenue channels to sustain public radio into the future. Given the changing landscape of journalism, media consumption, and digital advertising, there is an increasing urgency to test and measure the effectiveness of different funding models.

These materials were created for 6 cohort stations who worked with BizLab from January — December 2019.