



Packet 3:

BizLab

Analysis Methods & Tools

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Table of Contents

Analysis Methods and Tools	4
Background	4
Overview	5
Choose the right methods for analyzing face-to-face research.....	5
Analysis methods [Packet 3]	5
Analysing Quantitative Data	7
Analyze existing data	7
Things to think about	7
Affinity Diagramming	8
Materials needed	8
Set up (after interviews are completed)	8
During the session.....	9
After the session	9
Documenting the outcomes	9
How Might We Stickies	11
When to use	11
Materials needed	11
Set up	11
Instructions	11
Ideating using themes and insights.....	12
Empathy Maps	14
When to use	14
Tips	14
Empathy Walls	16
When to use	16
Experience Narratives	17
Instructions	17
Best practices	17
Example.....	17
Research Walls	19
When to use	19

Instructions	19
Glossary.....	20
Questions?	22
WBUR BizLab.....	22

Analysis Methods and Tools

Background

Packet 3: BizLab Analysis Methods and Tools is a collection of methods and tools to help you make sense of information and data gathered during the Discovery Research phase of a BizLab project. Some of these methods were used with the BizLab team during early analysis, and others were used during the 3-day workshop in Boston. The details of how this process worked is in *Packet 1: The BizLab Method*.

This packet, along with *Packet 2: BizLab Research Methods and Tools*, gives you the full range of research and analysis 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.

The reason analysis is so important is that it is not enough to just look at your individual notes and pull out what you think is important – the really good stuff is often hidden in the data. By breaking apart the notes, organizing the data, arranging and reformatting the data from different vantage points, and talking about it with your team members, the hidden gems begin to surface.

This phase is, in fact, as important as gathering information because it's here that the magic happens. The conclusions that emerge from your analysis will give you the insights needed to design a service or product that your audience will embrace.

Overview

Choose the right methods for analyzing face-to-face research

Once you've done research and gathered your data, the fun really starts. All that data needs to be analyzed and synthesized into insights that you can use. This is when the "aha" moment often strikes – your idea takes a turn for the better as you gain a deeper understanding of your target audience.



Goal of Research

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

During your BizLab project, most synthesis happened in your 3-day workshop between the research and experiment phases. We asked you to do some minor synthesis of your data before you arrived at the workshop so that we could dig even deeper into it during the little time we had together.

Below are the methods and tools described in this document. *Methods in italics* were used in the 3-day workshop. Methods such as Affinity Diagramming should be applied immediately after any research activities – it helps to check in on your research and identify potential holes in your findings.

Analysis methods [Packet 3]

Making sense of your interviews

- Affinity diagramming
- Data analysis
- *How Might We* stickies
- *Empathy maps*
- Empathy walls
- Experience narratives
- Research walls

Tips:

- Take photos of everything you create, especially those with sticky notes such as affinity diagrams or empathy maps.
- You might transfer items on sticky notes into a spreadsheet to document and/or share what you've learned
- Work in teams – discussion and sharing what you are learning leads to a deeper understanding of the overall findings

Analyzing Quantitative Data

Method: Collect existing data and fill in the gaps by planning new research. A blend of quantitative (facts and figures) and qualitative (notes from interviews and observations) sparks ideas and informs effective solutions.

It's good practice to use both qualitative and quantitative data during research – the way to analyze them differs. Quantitative data tends to be done using spreadsheets and presented using charts, graphs and numeric tables.

We are here to help you find the nuggets in your raw quantitative data, whether it's from surveys or Google analytics from your website or app. Ted Fuller, BizLab's Business Technology & Analytics Lead, is here to provide support.

Analyze existing data

- Google Analytics – how to set up analytics for your website. Google analytics can be a good source of user behavior, that is, data about your users when they visit your website. You can also use Google Analytics to learn about who is visiting your site.
- Email analytics – if you have a newsletter, look at engagement
- Integrate other data with your data, eg population data with membership data
- Give Ted access to your Analytics account. Even if your project encompasses only one web property, it may be valuable to review the analytics of your *other* sites or apps as context/foil for the one you're concerned with.
- Provide any survey data, Excel, .csv files (eg member survey, marketing data, demographics etc)

Things to think about

- Some tools have charts, graphs and tables to help look at data, such as Google Forms, Google Analytics, SurveyMonkey and Qualtrics. Email tools such as MailChimp or Constant Contact provide dashboards of email engagement. Instagram, Facebook and Twitter also provide simple engagement data. Each allow you to download the raw data to explore in more complex ways, or to triangulate with other, related data.
- It is easy to get lost and overwhelmed by large amounts of quantitative data. By simply using a spreadsheet such as Excel or Google Sheets, you can begin to make sense of data.
- You can learn more by cross-tabulating data across multiple data points. For example, you might want to find out how women, between 35-50 typically listen to news (in the kitchen, the car, at the gym, at work etc). These are 3 different dimensions.

Useful Reading

SurveyMonkey: How to analyze survey data

<https://www.surveymonkey.com/mp/how-to-analyze-survey-data/>

Qualaroo: How to Analyze Survey Data: A Comprehensive Guide

<https://qualaroo.com/marketers-guide-surveys/analyze-survey>

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.

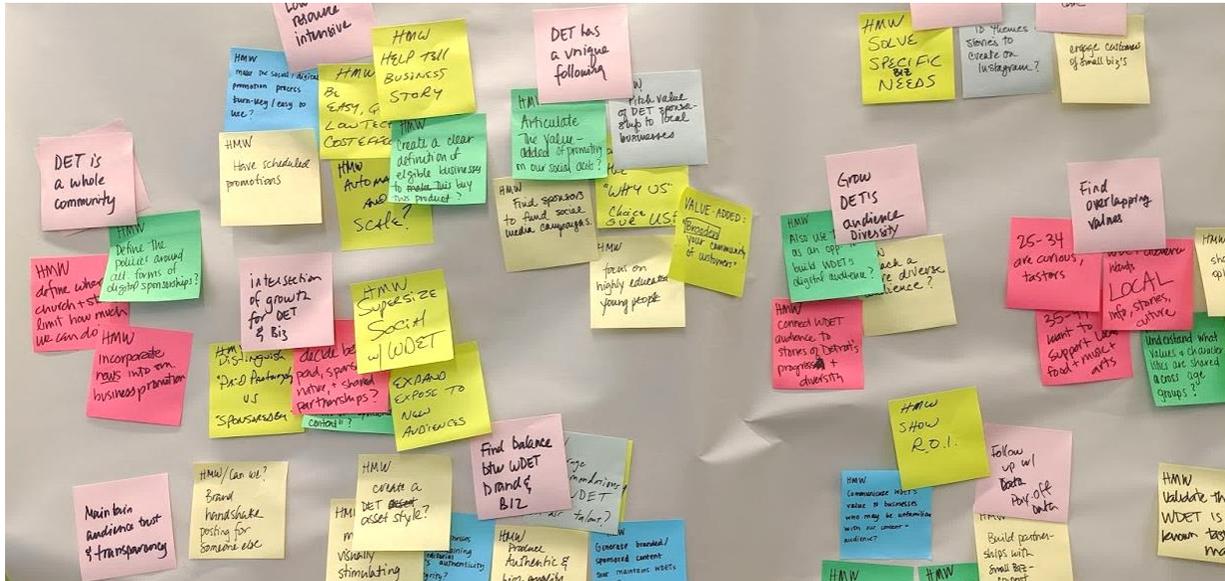


Figure 1: Grouped sticky notes, with grouping headings, or themes, in pink.

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 or flip chart paper
- Blue masking/painters tape
- Sticky notes in different colors
- Black sharpie markers
- White board or flipchart (as needed)

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 study 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 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 about 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 themes and summarize the key findings captured by the sticky notes
- Prioritize the themes 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

How Might We Stickies

Method: The How Might We method enables you to expand on ideas or go deeper into an insight. They can also be a bridge from insight to ideation.

Typically done as part of a group activity.

You can use the How Might We method in several different ways: after an affinity diagram or other analysis method, as a way to expand the thinking within a workshop, or, as part of a design sprint. During your BizLab project we used this method in your 3-day Boston workshop. The approach below describes the way we applied How Might We stickies at the workshop.

When to use

How Might We (HMW) stickies are typically created with a group while listening to research results. This allows participants to share and benefit from each other's ideas. Writing HMW stickies also gets everyone actively listening together.

Materials needed

- Sticky notes (everyone gets the same color. Consider one or two other colors for labelling grouped themes)
- Black sharpies, one per participant
- Flip chart paper or a roll of paper, plus painters tape to put the paper up on a wall
- Voting dots (optional)

Set up

On Day 1 we set up the room with either flip chart paper or a roll on the wall ready for affinity diagramming the HMW stickies. Each participant is given a pad of sticky notes and a black sharpie. Write the instructions below somewhere visible, such as a white board or on a sheet of flipchart paper, and review them aloud before the first presentation.

Instructions

Writing HMW stickies:

Ask the group to write their ideas, thoughts, concerns on sticky notes rather than in a notebook. This is how we share our thoughts and ideas after a research presentation.

Write the following either on a flipchart page or on the whiteboard:

First: *I draw a sample sticky, like the example below.*

	<ol style="list-style-type: none"> 1. Only one idea per sticky. 2. Write "HMW" at the top to frame the thought/idea as a question (as in the example to the left). 3. Write using a black sharpie to make them easy to read from afar
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After a research presentation or lightning talk, collect the stickies and place them on the flip chart paper or roll of paper.

To get people going, I'll write a few during first 5-10 minutes of a research presentation, then stop the presentation to read them aloud and put them on the sheet of paper. This helps participants understand what's expected. I'll also ask if anyone else has one or two to put up on the sheet of paper.

Example

Imagine we learned the following during research: *Podcast listeners are often doing something else while listening such as driving a car or exercising, and unable to take action such as make a donation.*

The HMW stickies might include:

- HMW...notify listeners later when they are able to make a donation?
- HMW...help listeners understand the need to donate to a podcast?
- HMW...offer donors something extra in exchange to compel them to become a donor?

Grouping HMW stickies

To group stickies, use the affinity diagramming method. See Affinity Diagramming on *Page 8*.

Once all HMWs have been collected, placed on the paper and grouped under themes, it's time to vote.

- Each person gets 3-5 dots (or 3-5 votes with a pen).
- Vote for a theme or an individual sticky note.
- You can put dots on 5 different items or put more than one dot on an item you believe is important.

Ideating using themes and insights

During your BizLab project, we did this during Day 2 of the workshop. We choose a theme and a persona to create potential ideas.

Step 1: Choose an insight with top votes

Step 2: Working as a group brainstorm approaches to the insight using another set of sticky notes.

Step 3: Share the solutions with each other. To do this you could:

- Place stickies on an Impact/Effort 2x2 to help prioritize
- Group them in another affinity diagram to see the common themes to find opportunities
- Brainstorm product or service ideas which could address the ideas raised and selected (eg you might take one idea from the 2x2 prioritization framework.)

Eg: HMW...notify listeners later when they are able to make a donation? Ideas could be: email people after a podcast is aired, allow them to bookmark, use voice commands etc. Then place the ideas on an Impact/Effort 2x2 matrix drawn on another sheet of paper.

Useful reading

Stanford d.school: Use How Might We questions to create “actionable provocations”.

http://crowdresearch.stanford.edu/w/img_auth.php/f/ff/How_might_we.pdf

IDEO – Martin on how to write How Might We stickies

<https://youtu.be/N0fkNvyB7ZQ>

Tamara Christensen: Insight Inspired Innovation

<https://www.slideshare.net/tamaradoesresearch/insight-inspired-innovation>

Empathy Maps

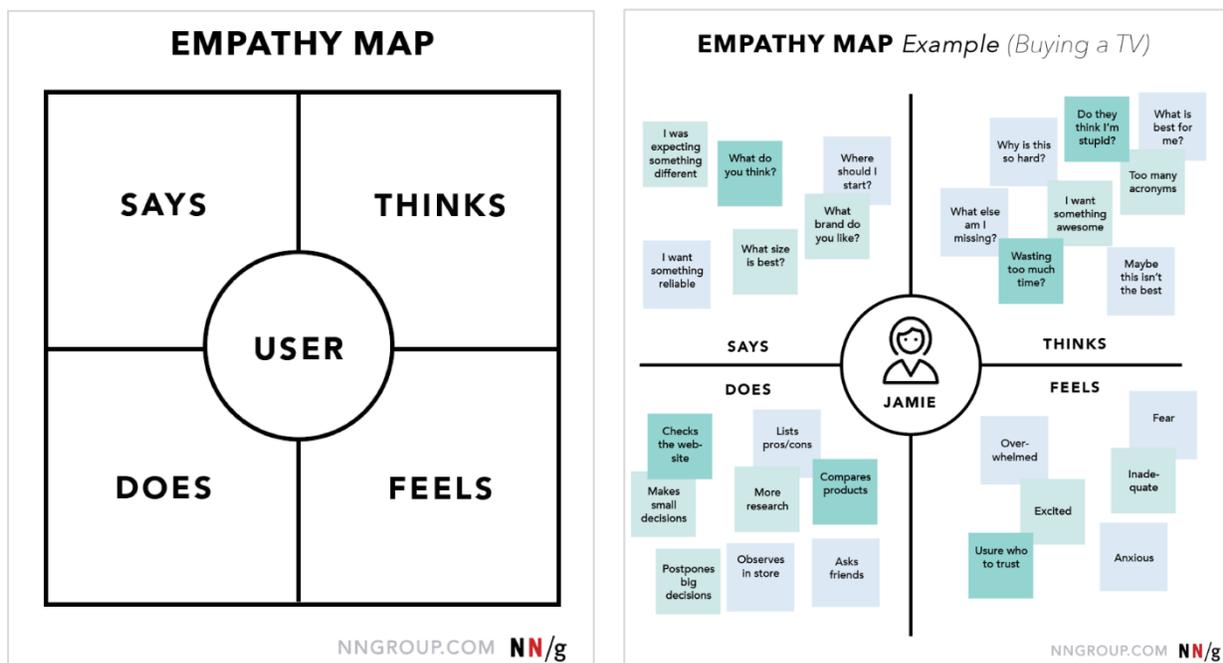
Tool: An Empathy Map allows you to capture what you've learned about your target audience within a framework that informs design.

An Empathy Map is a collaborative tool teams use to gain a deeper insight into their customers.

Outcome of empathy mapping are insights **about the people** you're designing for.

Use an empathy map to take what you learned and organize your qualitative in a structured way that drives product decisions, to connect the experience to your end product idea.

Created by Dave Gray of XPlane.



When to use

Use during audience research in Phase 1. You can:

1. Create one map per interview *or*
2. Create a consolidated map reflecting a persona after you've interviewed at 3-5 target audience members. Typically done together during a 2-3 hour collaborative workshop.

On BizLab projects we use Empathy Maps on Day 1 of the workshop. We learn a lot about the target audience during face-to-face interviews. The findings are captured on sticky notes and then used to develop 3 strawman personas who represent the primary audience members targeted by each idea.

Tips

- Be sure and consider a specific activity when creating the empathy map. If you approach the experience too broadly, it becomes meaningless. Create a type of person with a name and some

demographics (e.g. Wanda, 39 year old female, married working mother with 2 children ages 10 and 12. Interested in podcasts about her state to tell local stories her real estate clients.)

- Work with one or two other team members and discuss what you believe the target audience member does, says, thinks and feels. Each of these attributes are equally important when getting into the shoes of the person.
- You may stumble across new insights as you build the empathy map – make sure that you capture those needs and insights as you go.

Instructions: Nielsen Norman Group: Empathy Mapping
<https://www.nngroup.com/articles/empathy-mapping/>

Template: Gamestorming: Empathy Map Canvas
<https://gamestorming.com/wp-content/uploads/2017/07/Empathy-Map-Canvas-006.pdf>

xPlane: Updated Empathy Map Canvas
<https://medium.com/the-xplane-collection/updated-empathy-map-canvas-46df22df3c8a>

Useful Reading Adobe: 10 tips to develop better empathy maps
<https://theblog.adobe.com/10-tips-develop-better-empathy-maps/>

Miro: Introduction to empathy maps
<https://miro.com/blog/introduction-to-empathy-maps/>

UX Pin: The practical guide to empathy maps – creating a 10 minute persona
<https://www.uxpin.com/studio/blog/the-practical-guide-to-empathy-maps-creating-a-10-minute-persona/>

Empathy Walls

Method: Empathy Walls are a collection of Empathy Maps that build a combined and shared understanding of your customers.

An Empathy Wall is created out of *many* empathy maps. You can also add anything else that contributes to your understanding of your target customer. Build it in an accessible, communal space to allow members of your team, and stakeholders, to review and comment on an ongoing basis.

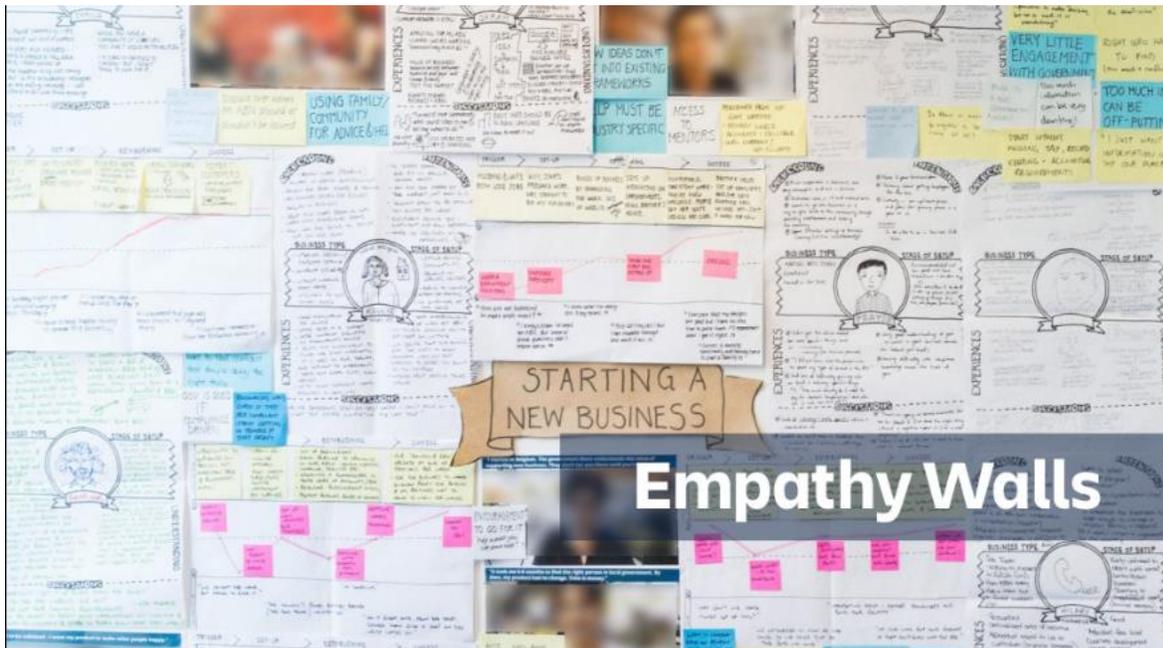


Figure 2: <https://www.slideshare.net/RosenfeldMedia/operating-in-context-leisa-reichert-at-designops-summit-2018>

When to use

- When your team has developed multiple individual empathy maps to capture interview data.
- When you have a large number and want to look for themes and patterns.
- When there's value in an extended review by non-team members. They can “walk the wall” and add comments via sticky notes.
- When you want to communicate your work to stakeholders such as senior management.
- Also see “research walls” which blend tools like Empathy Maps with other research.

Useful Reading

Miro: Introduction to Empathy Maps

<https://miro.com/blog/introduction-to-empathy-maps/>

Rosenfeld Media: Operating in Context

<https://www.slideshare.net/RosenfeldMedia/operating-in-context-leisa-reichert-at-designops-summit-2018>

Experience Narratives

Tool: Use experience narratives to describe the future experience you wish to deliver for a specific target audience type or persona.

Narratives, or stories, are powerful ways to envision and explore an ideal experience for your target audience. Fueled by the research you have collected, they can be used to begin design and also to imagine **the future experience**.

A narrative is aspirational and written by team members.

Instructions

1. After you've interviewed several members or businesses, writing a story helps synthesize what you heard. You can address the current state revealed by the empathy map by creating a story that solves key pain points and delivers new emotions.
2. Create 1-3 personas who represent your target audience. You might also include personas representing people at your organization since a narrative often includes more than one person.
3. Write one narrative for each persona. Include:
 - A description of the persona
 - A trigger that begins the experience – why are they involved? How do they engage? How are they feeling from the beginning?
 - Their complete experience through a set of interactions
 - A context for where and why they are interacting with your organization

Best practices

- Use actual names and details that make the narrative concrete.
- Cover **one** path through the experience. Make it specific, not general.
- Include emotions and details in order to think about the actual experience of the persona featured in the narrative.
- Describe the interactions between people, technology and other touchpoints; the whole experience.

Example

Note the detail and emotion. Each story starts with a “trigger” paragraph which sets the stage for the story. Work towards the desired outcome. Take into account anything else going on to set the context, e.g. is the persona interrupted? Is she sending something to someone else? Is she receiving anything? How does she feel at key points in the story?

Rebecca is a 32 year old civil rights lawyer working on a case that's getting her down. She takes a break and browses the DCist on her iPhone. She sees good news about improvements on the Metro and looks at the horoscope because it's always fun. She needs a pick-me-up and it lifts her spirits. There's an ad about supporting DCist - there's an event coming up – a members only tour of Frank Lloyd Wright's Pope-Leighey House which looks interesting and hey, it's not civil rights.

She clicks through to the event and sees it's free for members. Curious, Rebecca taps on the Become a Member button. She's impressed that there are so many appealing benefits – free

concerts, local news updates, and out of the ordinary activities The membership fee is easily within her budget plus she's supporting public media, a cause she supports. She decides right then and there to join.

After a crazy easy sign-up process (she didn't even have to take out her credit card and found the payment method completely trustworthy), she sees the list of upcoming member events. Rebecca signs up for the tour this weekend. As a member, she can bring one guest. Her friend, Maya, loves visiting interesting houses and might come along. Her registration is confirmed and there's an option to send an email to a friend with the event information. That makes it easy to ask Maya right away. She fills in Maya's email address and adds a quick note. All set!

Time to get back to work. Rebecca now has something to look forward to this weekend, which didn't take long to find and organize, and now work doesn't seem as hard. She feels reenergized.

Useful Reading

UX Magazine: Designing around the whole story with user narratives.

<https://uxmag.com/articles/designing-around-the-whole-story-with-user-narratives>

Stamford U: The Power of User Narratives.

<https://ecorner.stanford.edu/in-brief/the-power-of-user-narratives/>

Alexander Cowan: Storyboarding the Customer Journey.

<https://www.alexandercowan.com/storyboarding-tutorial/#Storyboarding the Customer Journey Growth Hacking>

Research Walls

Tool: Research Walls capture your audience research—in all its forms—throughout a project.

There are many benefits to Research Walls: they're easy to create, they make your research visible to your team and stakeholders, and they bring together all the various bits of information about your audience in a way that supports and allows for connections and insights.

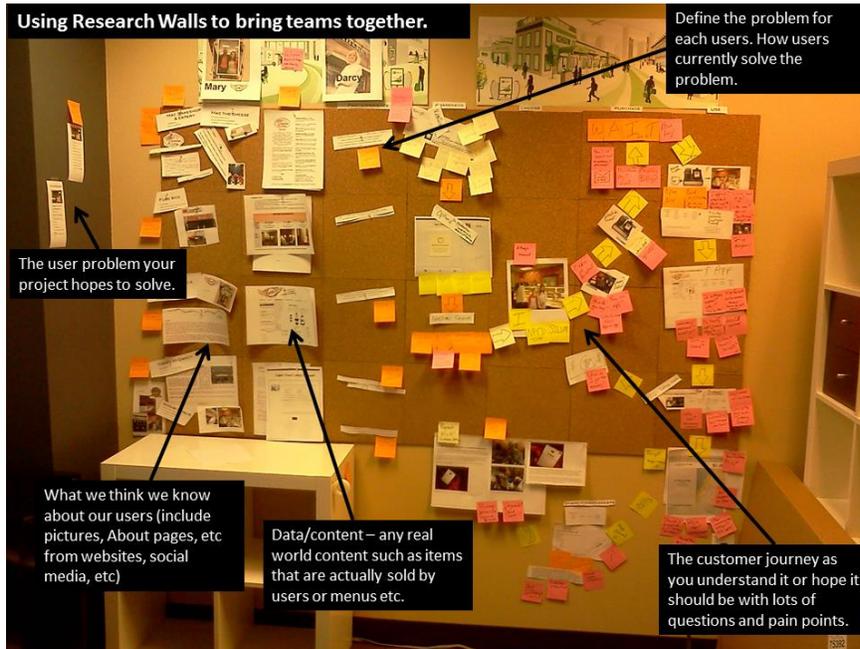


Figure 3 Parts of a Research Wall, Eddie James

When to use

Start the wall at the beginning of the project and add to it as you collect research. This means you need to have a dedicated space for the duration of your project.

Instructions

1. Select a location (wall or room) you can use for the duration of your project.
2. Clearly label the wall in extra large letters; for example, PODCAST DONATION RESEARCH WALL.
3. Write the problem

you're trying to solve. Example: *Get listeners to pay for our podcasts. As you develop possible hypotheses to solve the problem, add these too.*

4. Assemble any existing information about your audience: data charts, personas, etc.
5. Add to the wall as you gather research. Research can include: empathy maps, experience narratives, interview findings, pictures, illustrations, collages...the output of any research methods you have used. Post sketches or descriptions of solutions as you develop them.
6. Highlight connections by grouping elements together or pinning string to illustrate connections.

Useful Reading

Learning Usability: Research Walls: a low-tech way of communicating the user journey to cross functional teams

<http://learnusability.com/ejportfolio/research-walls-a-low-tech-way-of-communicating-the-user-journey-to-cross-functional-teams/>

Smashing Magazine: How Working Walls Unlock Creative Insight

<https://www.smashingmagazine.com/2014/01/how-working-walls-unlock-creative-insight/>

Glossary

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

Method	Research	Analysis	Experiment	Definition
Workshops	✓		✓	Bring a group together to co-create or co-discover.
Cards	✓			Use cards to help understand people's thinking. Card sorting, card clustering, card ranking, card alignment etc.
Face-to-face interviews	✓			Pre-scheduled interviews with target audience, either in person or via live video meeting.
Café / Guerilla interviews	✓		✓	Find audience members "in the wild" for interviews or rapid testing. Not necessarily
Intercept interviews	✓			Find audience members at specific locations or events while they are engaged 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	✓			Gain 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, which has been 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]</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 approach to innovation pioneered by Anthony Ulwick and Clayton Christensen. The idea is that people are outcome driven.

Method	Research	Analysis	Experiment	Definition
Learning targets	✓		✓	A teaching tool appropriated to experimentation. Identify what your experiment is trying to learn.
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. Eg. “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. Also see KPIs and OKRs (Objectives and Key Results)
Design thinking	✓	✓	✓	Continually exploring the problem space through every phase of research and experimentation. <i>Also see d.school process.</i>
Empathy	✓			<i>Step 1: d school design thinking method</i> “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		✓		<i>Step 2: d school design thinking method</i> “The define mode is when you unpack your empathy findings into needs and insights and scope a meaningful challenge.” BizLab: 3-day workshop
Ideate		✓		<i>Step 3: d school design thinking method</i> “You ideate in order to transition from identifying problems to exploring solutions for your users.” BizLab: 3-day workshop.
Prototype			✓	<i>Step 4: d school design thinking method</i> “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.”
Test			✓	<i>Step 5: d school design thinking method</i> “Testing is your chance to gather feedback, refine solutions, and continue to learn about your users.”
Discussion guide	✓		✓	A set of questions a 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.

Questions?

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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.