

Let your WHO & WHY drive your HOW & WHAT

Giving voice to your users is
essential to project success

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Menlo High-Tech Anthropologists®

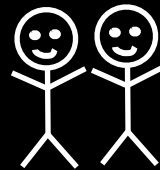
Thursday, March 5, 2014

2015 Lean Transformation Summit, New Orleans

Who is Menlo?

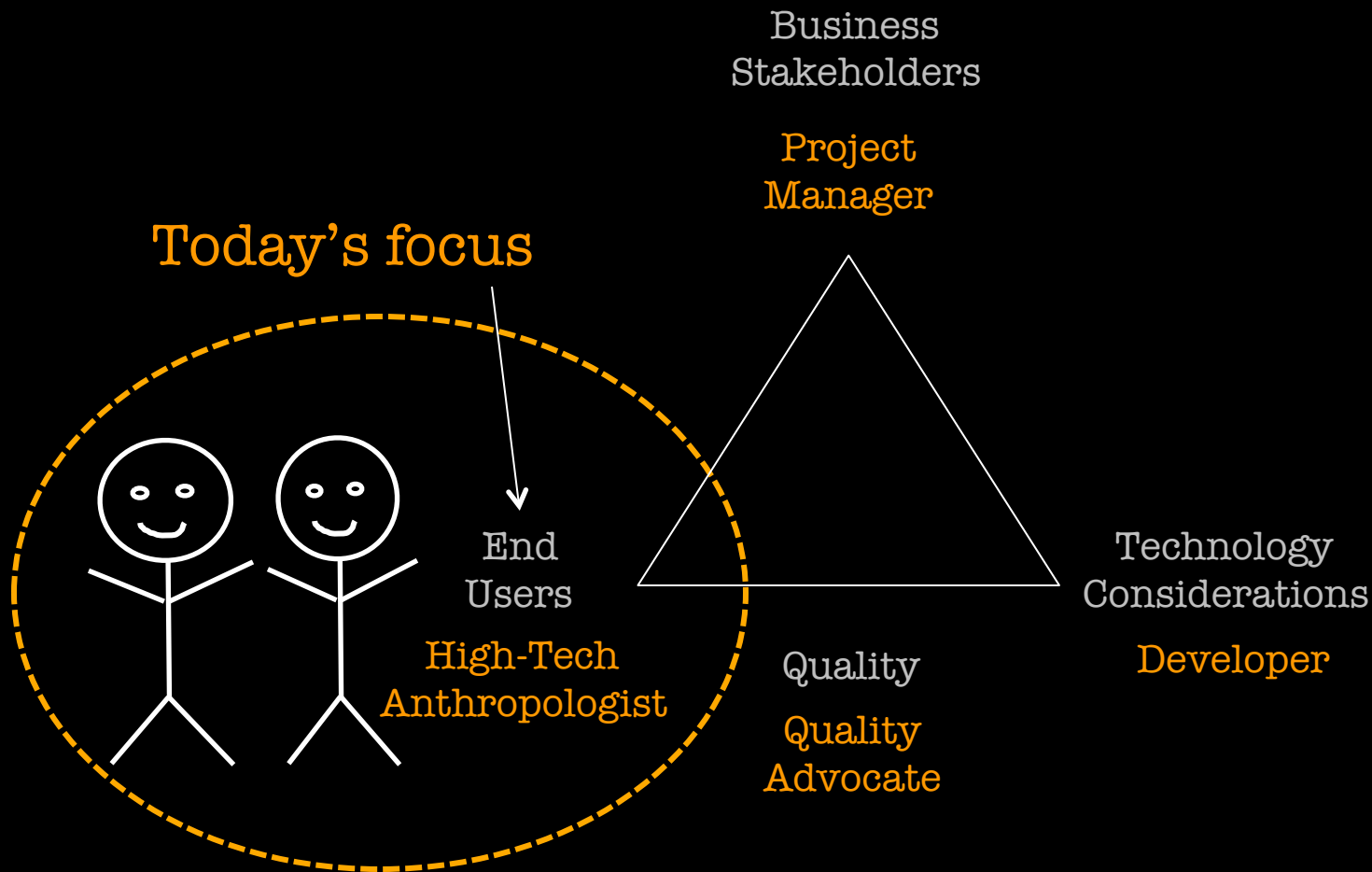
Our Mission as an organization is to end human suffering in the world as it relates to technology[®]

For our clients, we do this by creating software that is **widely adopted and enjoyably used by their intended end users.**



High-Tech Anthropologists

Our advocacy model



So what do High-Tech Anthropologists[®] do?



End Users



Solution
(software, for example)
to a
business
problem

High-Tech Anthropologists[®]

So what's the
“Who & Why”
problem?

There are a LOT of voices on a project,
but some are **often missing...**



If success = widespread
adoption and enjoyable use...

...how can your project succeed if
you can't accurately
identify and understand
who your end users are
and what they are trying to do?

We're here to share some tools for project success

We believe in:
active learning and
teaching, never
working alone,
working hard while
having fun...in
short, JOY!



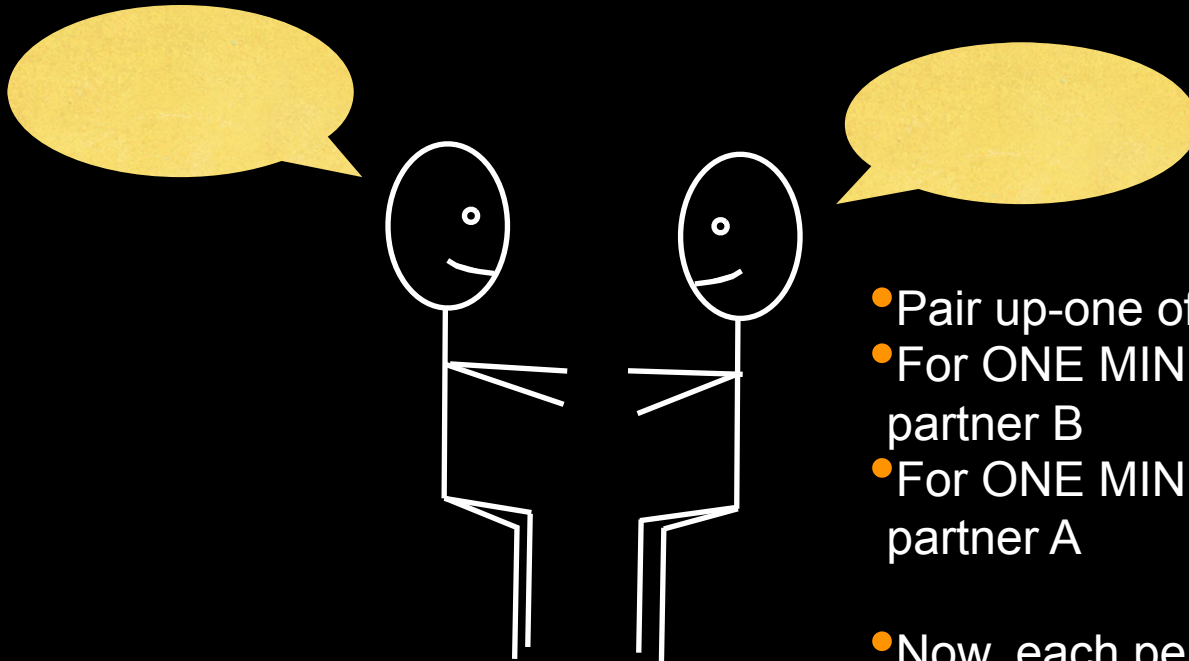
Today's tools: What's next

- Interviews
- Observations
- Problem Statement
- Personas
- Persona Map
- Goal Matrix



Meet your team

(and practice interviewing)



- Pair up-one of you is A, the other B
- For ONE MINUTE, A's interview your partner B
- For ONE MINUTE, B's interview your partner A
- Now, each person spend ONE MINUTE introducing your pair partner to the rest of your table team

Why **observe** rather than just ask?

You can see what people **actually do** rather than what they report that they do (or what they think they should be doing)

As human beings, we become
“unconsciously competent”

Why **observe** rather than just ask?



Think about someone tying a shoe

What might they tell you?



It's simple. Been doing it for years



What could you observe?

Process

- Step 1. Take the right lace and cross it over the left lace, grasping the laces together where they have formed an X.
- Step 2. The right lace will go down, under and through the left lace.
- Step 3. Grab the right lace in your left hand and the left lace in your right and pull them tightly. You have formed the first knot.
- Step 4. Form a loop holding it with your right index finger and thumb close to the book or shoe.
- Step 5. Take the left lace and go around the loop. Feel for the thumb on your right hand and that's where you will push the lace through. Grasp the emerging loop with your right thumb and index finger.
- Step 6. Slip your left hand to the top of the left loop.
- Step 7. Pull on both loops until they are tight.
- Step 8. Check by feel the length of your loops to make them even. Check the length of the ties to make sure they aren't too long.

Pain

- Shoelaces not long enough for all holes
- Look of frustration when shoelace breaks
- Shoelace wet and dirty

Workarounds

- Partial lacing
- Remove shoe without untying

Who: Observation candidates

- People directly involved with or impacted by the problem you are investigating
- Brainstorming a list candidate roles is helpful
- Iterate on the roles as information from interviews and observations deepens your understanding of the problem space

Who: Observation tips

- Adopt a “beginner’s mind”—remember that you’re not the “expert”—you’re there to learn
- Never assume why someone does something—ask during follow-up
- Pair—four eyes are much better than two
- Pairs can challenge each other’s assumptions
- Observe them in “their native environment”

Why: What problem are you solving?

- Problem originally described by business, then gets refined by evidence (the “Who & Why” processes)
- Humans typically describe a problem by telling you the solution—dig deep, use “The Five Whys”
- Avoid solutioning with the “Solution Bucket”—this part of the process is all about **open-minded discovery**
- Goal: Reach agreement on the target problem—critical to project success



How: The problem statement tool

Problem Statement

What are the problems or opportunities your organization is currently facing?

Project Vision Statement

What will this project produce? What will it not include?

Product Positioning Statement

What does success look like, and to whom?



And now, it's your turn...

1. Read the problem statement aloud to your whole table team
2. Pair up to observe the two videos
3. Debrief with your pair partner
4. Share highlights with your team





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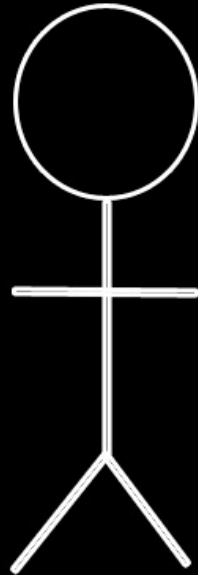
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Who are they (the users)?

Roles vs Personas

I represent one of the many many "hats" a human being wears every day




Role: Parking Lot Attendant




We represent composites of real people. We're workers, parents, brothers, scientists, PTA presidents, athletes, students and much much more. We have many goals, often conflicting ones...

Anatomy of a Persona: What's Included?

	Realistic Name Job title/relevant descriptor Age Organization or Place
<ul style="list-style-type: none">o Attribute #1: Brief description of something important about this person relevant to the project topico Attribute #2: Brief description of something important about this person relevant to the project topico Attribute #3: Brief description of something important about this person NOT directly relevant to the project topic	
Goals	
<ul style="list-style-type: none">o Goal #1: Brief description of a goal relevant to project topic. Be sure goal is written in future tense.o Goal #2: Brief description of a goal relevant to project topic. Be sure goal is written in future tense.o Goal #3: Brief description of a goal NOT relevant to project topic. Be sure goal is written in future tense.	

- A persona is a fictional person who represents similar characteristics across multiple people
- Created from synthesizing information gathered by observations and interviews
- You should be able to recognize them if they walked through the door

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1. Read the example personas to your team

2. Pair up and write at least one persona per pair based on what you observed

3. Share your personas with your team

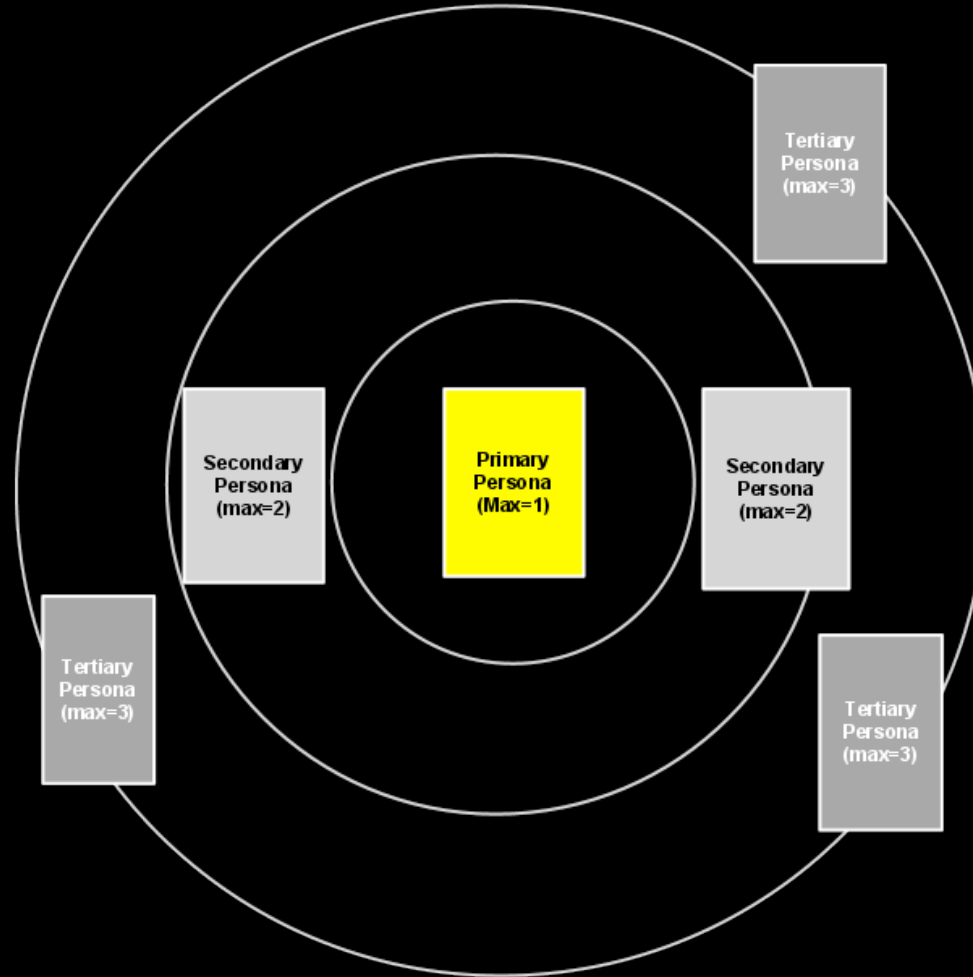
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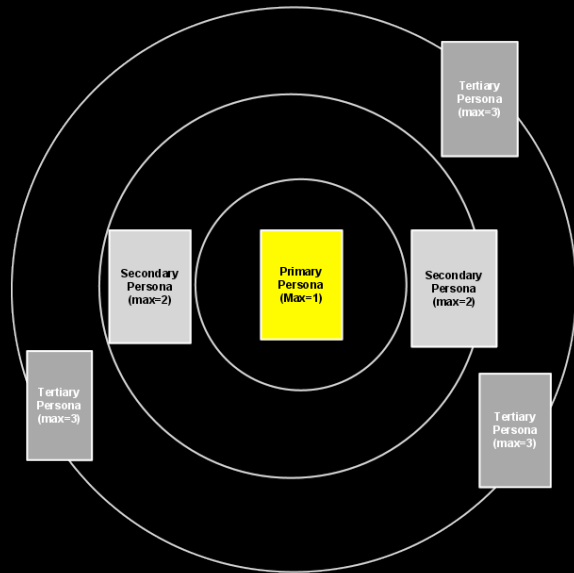


Who's important?

The power of the Persona Mapping Game



And now, it's your turn...



1. Three team members adopt the role of business stakeholders and move to an adjoining table

2. The rest of the table team will be observing (High-Tech Anthropology role)

3. Business stakeholders, you do the actual mapping. You have 15 minutes to read personas and prioritize. HTAs, you just observe!

4. Tape down when you are done

5. Return to your team and share.

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Roles & Goals

How to prioritize solution needs

Goal Matrix	Primary Persona	Secondary Persona	Secondary Persona	Tertiary Persona	Tertiary Persona	Tertiary Persona	Business Goals
Roles/Distinguishing Characteristics	Tech-challenged senior	Busy mom of young kids	Local business owner	New teen driver	Customer service rep	Delivery truck driver	
I need to save money	X			X			
I want to avoid tickets	X	X		X		X	
I don't want to feel stupid	X	X	X	X	X	X	
I want to pay any way I can	X			X		X	
I need to avoid complaints					X	X	X

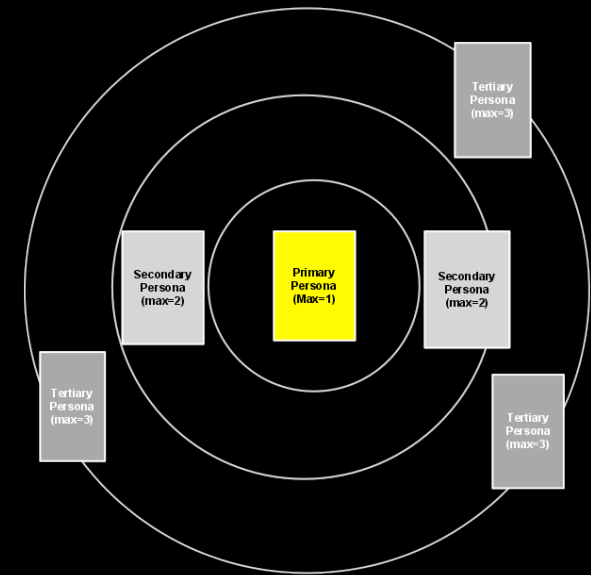
Parting Thoughts: Persona Tips


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- Start simple
- Write them in pairs
- Do at least 30
- Use a role checklist to make sure you cast a wide net (experience, ethnicity, etc.)
- Use unlined 3x5 index card, vertically
- Purchase clipart pictures

Persona full employment

- Prominently display persona map in project spaces—capture “whys”
- Invite your persona map to every meeting
- Frame solution discussions around meeting the goal of a persona—refer to them by name



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Who & Why: The Tools

- ✓ Interviews
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Yea!



Thank you for sharing this
experiment with us

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We will be available afterward
for questions