



Generating Insights

A guide to generating insight through research

Research is the primary risk management tool you have in product development. It is also the biggest driver of insight and breakthrough ideas.

The challenge many people face is doing it in a way that retains creativity and objectivity. Balancing the technical and human centred approaches can be a challenge but the results are worth it.

This document sets out a practical approach to undertaking research for product development. It provides guiding principles for primary research and how to interpret information and create insights.

Our approach has been developed from a range of other approaches and our own experiences. It provides a common approach that can be applied across all types of research.

The research loop

Understanding people's needs and requirements is the key to unlocking insights, but is not enough on its own. It must be coupled with a broader understanding of the business, product, and technical context; the product system, which is achieved through customer research.



Research

The goal is to learn about the context with an open mind to develop a greater understanding.

Understanding

This is the precursor to insight; we find that as we learn, our understanding develops to the point that insight is possible.

Insight

This is when everything suddenly comes together into a form we can understand and communicate.

This research loop is iterative, and used throughout the development process to deliver fresh insight into the process. It does not stop once we have made the major breakthroughs.

Statistics are not enough

People like dependable, hard statistics to prove either that an opportunity exists or that it doesn't. The problem is, that although relevant, statistics are not enough; very rarely do they provide the understanding and insight we need to drive product development and innovation.

Context is everything

A simple in-context conversation can yield a huge amount of information. It can inform how you think about other people, how they use products as well as their issues, challenges and thought processes. It can irrevocably change your perspective. This can all help your understanding and in turn, deliver insights you and your team can use to develop better products and services.

A three-dimensional picture

Combining an analytical and humanistic approach is essential to developing a three dimensional picture to establish what the real opportunities are. Often, facts, figures and observations combine to provide powerful indicators about gaps in the market or provide a compass bearing for your activity.

Your best risk management tool

Research is, put simply, the best risk management tool you have. Taking the time to look without preconceived ideas (not easy!) helps to give a more accurate picture of what you're looking at.

It does not stop at the start

Our understanding changes over time, and it is vital that we continue to iteratively research and further develop our understanding during the program of work.

Be prepared to be wrong

We all like to be right. However, in more occasions than I care to remember we thought we had an accurate picture and it turned out to be wrong, even with a lot of research. Being open and not dogmatic will improve your chances of delivering something successful.

The broad process

The process of turning research into insights is generalised into four stages:

01

Prepare

Define the objective and plan the approach

02

Capture

Use a variety of approaches to capture the data

03

Understand

Pull together and make sense of data

04

Interpret

Translate understanding into insight

The objectives should be relative to the scope of the project – an objective that is too broad will be unachievable. What do you need to know at this stage of the development process?

Define the different research streams and begin by recording your hypothesis for each. For example, customer research, technical research, competing products or market research streams.

This will drive the research to query whether they are right or wrong assumptions.

Prepare

OBJECTIVE HYPOTHESIS APPROACH

What are you trying to answer?	What do you know, or think you know, about the customers and the product eco-system?	What approaches will you use to conduct the research and capture the data?
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Capture

RESEARCH

What are the details of the research events? Outline/plan for where, when, and who.

Understand

SYNTHESIS

How will you pull all the data together to make sense of it?
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Interpret

INSIGHTS

What do you need to translate the research into insights?

How do you plan for insights?

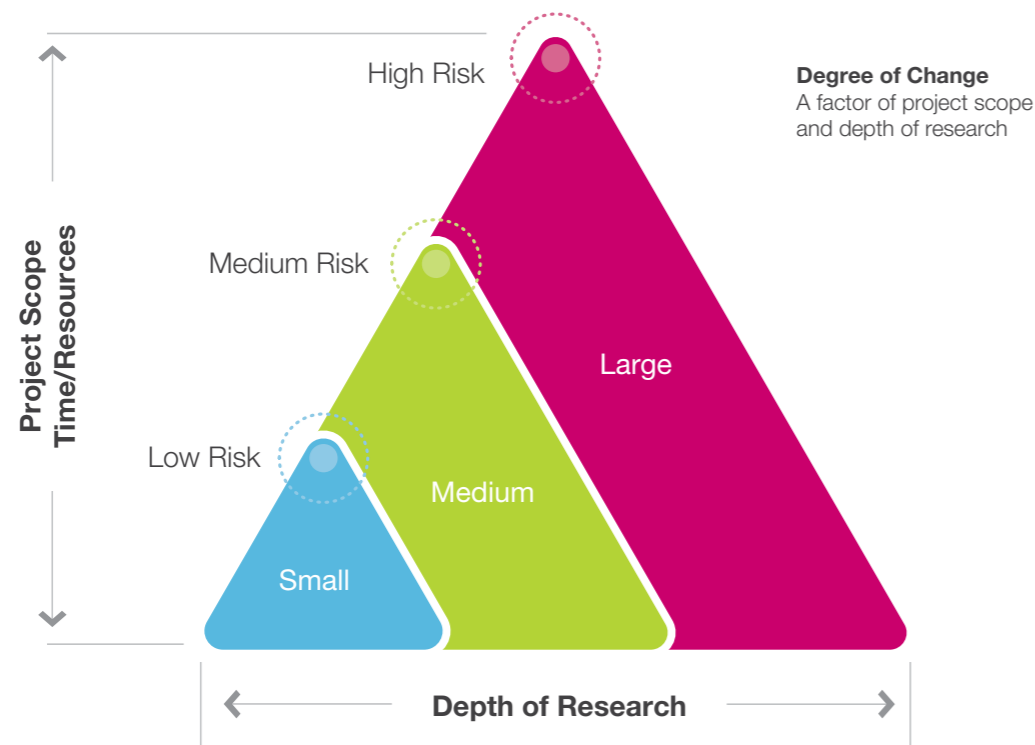
The key is to plan for insights and not just the gathering of research data. It's unerring how many times, if the work is done well and with an open mind, it will yield stunning outcomes.

First up you need to plan and clarify the scope and define the resources required to undertake the task at every stage. This information should be captured in a one-page outline, which is an effective communication tool for project stakeholders and provides clarity for the research team.

The synthesis and insight stages, where research is translated into insights, are energy intensive and often a challenging task. The work should be planned accordingly to allow sufficient time and resources, as this is where value is created.



Above: project room wall from the Texus Fibre development.



How much research is enough?

The amount of time, energy, and money that you invest in the research phase of a project should be proportionate to the degree of change that you are driving for.

This affects the overall size and scope of the project. For fundamental breakthroughs, a large research base would be desirable to maximise your chances of uncovering new insights and developing breakthroughs.

Conversely, even for small projects that perhaps are aimed at iterative development, a small targeted research phase will increase the project's success, if managed and used effectively.

Building an action plan

In the planning phase, outline the specific details of the research sessions – build the action plan.

- › How you will access these people?
- › How can you get objective answers?
- › Do you need to recruit?
- › What are the recruitment criteria?
- › Where should the research be undertaken? Location can provide valuable insights into people's natural (and most comfortable) environments.
- › Where can you source technical and market information?
- › Does the research plan match the project scope?

Things to remember

In our experience the keys to successfully implementing an insightful research process are:

- › Plan your research to generate insights.
- › Leave the office and immerse yourself in real life situations.
- › Use a range of methods, both qualitative and quantitative.
- › Get a mix of perspectives: internal and external; customer and expert.
- › Stay away from the familiar. You need an objective opinion from people who won't just tell you what you want to hear.
- › Document all findings in a usable format in order to build a rich resource.

What method should you use?

Selecting the most appropriate method(s) is important and is strongly related to the objective. Consider which is the best way to interrogate your hypotheses.

The most important question to answer during research is 'why'. Why is someone saying what they are? Why is that person behaving how they do? Why are the technical issues occurring? Probe and interrogate during research sessions to get to this point. Angle the questions and lines of inquiry to understand 'why'.

Research methods fall into four high level categories: observational, interviewing, surveying, and desk-top research.

These can be deployed as separate methods or combined to gather more data.

Observational Research

Watching and recording people's behaviour in context.



This can be a real situation or staged and should mostly relate to the end use of a product or service. Don't restrict the observations to the specific product – broaden the view and record other factors such as environment, conditions, related products, and people. These could all be relevant to innovative opportunities.

Interviewing

Meeting and questioning people about a topic; they may be experts or customers.



Interviews should be treated as conversations, allowing the flow of dialogue to organically evolve and build. Define the objectives and aim of the interview but steer away from a scripted list of interview questions. A script that's too tight can sometimes predetermine the scope and outcomes of the interview and will prevent the spontaneous

Surveying

Quantitative surveying can provide statistical metrics on predefined questions.



Develop an appropriate list of questions that can be accurately answered by someone if you are not there. When surveying it is important to capture a clear view of the demographic of the person on the survey. This will allow you to accurately correlate the answer to a specific market group.

Desktop

Predominantly web-based research drawing information from a wide range of media.



It is important to retain full citations for information traceability. Be mindful to correctly scope this kind of research because the seemingly endless volumes of information on the web can be a sink for project time

Guiding Principles of Customer Research

Customer research can provide invaluable insight for every aspect of a project. At the end of the day, the goal is to have people purchasing and using your product – so the earlier you can form a well rounded consumer view, the better it will be in the long run.

From experience, we have discovered the following:

Have empathy

Find out why they do what they do, and what's important to them. Ask such questions openly – you may be surprised by the response.

Ask them what they think their customer wants from them, and what they experienced the last time they used the type of product or service you are researching. What's their best experience and what's their worst – and why are these so?

These questions help place you more in their position so you can try to see the world as they do. A good question is to ask: "If you had a million dollars, or could do anything you dream of, what would you do?" This normally receives a very passionate and emotive response that you can unpick a bit. You can then draw conclusions as to why they've given this answer.

Don't answer the questions

People have a tendency to put answers in people's mouths or answer the question while they're asking it. Avoid doing this. Be sure your questions are open ended and allow for an open answer.

Try the "tell me about..." technique. When you ask people a question they tend to default to the response "well you know..." (which often you don't). If you use this technique, they may answer with more detail, being more specific about a given story or point.

Capture the moment

Always carry a camera and photograph the interviewee (if they are willing), the location, and any other useful artefacts. These will jog your memory when it comes to the synthesis stage. Putting a face and some details to the research helps humanise the insights when delivering back to the wider team.

Analyse the data when fresh

Aim to extract the key pieces of information within the next 24 hours. Leaving some time for the data to settle and make sense in the mind is good, but don't let it go stale.

Analyse in groups

Even though the research may have been undertaken by one person, aim to analyse the research in groups. Objective people in the process can interrogate the research and probe for further insights.

Be prepared for change

Insights will be uncovered through the research process that will change the course of subsequent research. Like most activities within product development; be prepared for this change. Prototype new hypotheses and test them in further research sessions.



Above: Jono conducting user research at a salon in Tauranga.



Meet in context

Try to meet and conduct the research in a relevant environment. A natural and applicable environment helps to spur conversation.

Break the ice

A good approach is to open by asking people why they do what they do. This helps open things up. It sets a relaxed tone which helps you cut through to what's important without restriction.

Be conversational

Plan your objectives but not necessarily the questions. Having a rigid set of questions can block the organic flow of conversation. Open the conversation up and the latent insights will be uncovered through on-the-fly inquisition and probing.

Broaden the view

During observational research, record as much data as possible beyond the specific subject matter. If researching in teams, have team members dedicated to record the environment, the conditions, and other people in the scene. Often, what isn't there is just as important as what is – insights like these can be the catalyst for innovation.

Get to the 'Why' points by free diving

Follow up statements with 'why' questions to examine the deeper level of meaning of what someone may be saying.

Capture it as it's said

The secret to good user and customer research is to capture exactly how something is said. This is critical because it's easy to misinterpret what was actually said with how it was said. When you enter the synthesis

process, a possible new insight can end up miles from where it should be simply because it was reframed incorrectly at the source. Remember that reframing occurs later.

Record and clarify

It helps to recap key points at the end of the interview to clarify the information. Keep transcripts and don't be afraid to go back to clarify at a later point if required.

Play the game of two halves: close the book but keep recording

Most people act a certain way when they are on camera and a different way when they are off-line. Intentionally stop and act like the session is drawing to a close, but keep a few gem questions held. Literally close your note book and then keep the conversation going and ask the questions you have held back as you are departing. People will open up more after the fact, feeling that now things have finished, you can just talk normally. It's in this state that people tell you what's really on their mind or what they really think.

Share back in low resolution

It's important that you quickly share with your broader team what you have learnt after each interview, visit, or survey. This helps circulate the flow of information, almost as it happens, a bit like a live news feed. It helps the team become aware of common themes and points and will be open to picking up insightful information.

Above: The team gathered around for a Discovery session.



Top: Krissi turning sketches into a mock up. Left: Insights cards generated for a project. Right: Robin in a brainstorm session.

How do you translate the research into understanding?

The research process will generate vast quantities of data and fragments of information that initially appear unrelated or disconnected. These bits and pieces have to be interpreted and translated into useful information and valuable insights. This is often the most challenging part of the process but it holds the most value.

It's important to work in groups quickly, to understand the data while it is fresh. The longer you leave it the more you'll lose the true meaning.

The synthesis stage aims to make sense of the masses of research data. It's both a qualitative and analytical process that involves bringing the information together, clustering common connected or relating items that influence each other and then filtering, grouping, and organising.

Looking for patterns

The human brain naturally likes to organise things. The vast sea of data can be overwhelming, so break it down to common themes. Look for crossovers and relationships between research outcomes and interpret these as insights

Cluster common themes

Group related information into common themes and contexts. Give each grouping a headline title or statement that clearly captures the combined core essential aspects of those items that are grouped within each cluster.

Be visual

Use photos, develop diagrams, and sketch out connections. Often, by translating information into diagram form, better clarity is achieved.

Identify problems and forces

Look for the problems that the customers face. Distinguish problems from issues. Issues are generally considered friction but not significant enough to affect the customer. Look for what many be at the heart of the problem or issue and what might be causing it or contributing to it. Associate these as forces; with most things there is a combination of forces at play.

Synthesise as you go

Create simple documents that capture the research as you go. By writing about your research findings while they are fresh, they not only become clearer, they can also be referred back to at a later date.

Make the information accessible and usable

Capture and summarise the information you gather from each research stream as you go so that it makes sense to the wider team. This will maximise the value you generate from the research. Not only does it give you the foundation for generating insights, it also gives you a wealth of information to refer back to and use during your project, and could even form the foundation for other projects.

“You can't study the darkness by flooding it with light.”

Edward Abbey



The team dives into the work, individually and collaboratively.

How do you generate insights?

When the information from one or more of your research streams is complete and recorded, it's time to start generating insights.

This is best done in a small team session with all participants having a full understanding of the research findings prior to the session. The session will generate fundamental insights and ideas that can then be crafted into well articulated and framed insight statements.

Frame insights & point of view statements

Once you have identified the underlying problems, issues, and forces, frame these by writing a succinct problem statement for each – normally there is more than one, but a single statement is OK. With each problem statement, frame a point of view statement. This is about capturing your belief and point of view of the problem, why it's really a problem, and then how this might be overcome.

The goal here is to really cut to what you think is the core problem, the epicentre of it, and then frame your point of view for why it's a problem. This will help you take a position. It also helps you to move from 'information insights' to 'what if insights' to further close your knowledge gaps.

What-if insights

With your point of view statements, it's important to explore and define a series of 'what if' questions. 'What if' questions help you to look at the core problem differently and by doing so gain greater insight?

With a series of 'what if' questions you can test your insights with more research. They will help you to better understand whether the core problems that you have identified are indeed accurate – your hypothesis of the problem – and whether your positioning point of view may offer new benefit.

The Tools

When conducting research, we use many different methods of capturing and translating information.

Collecting information

- › **Paper Notebook** to scribble notes, draw pictures, develop and review ideas in the field.
- › **Smart Phones** hold most of the research tools you need: a camera (photos and video), notes, data collection apps, audio recording, and the communication line back to the team to share-back immediately after the research.
- › **Camera** to capture visual records of the sites you visit and the people you meet. Save writing a thousand words. Be curious and record the moment, from your subject to details about their environment to how they interact with the environment – if you don't see something in the scene someone else might when you share back at base.
- › **Evernote / OneNote** are excellent digital tools for quickly collecting and management of research data. These apps can be used on the fly and can capture most mediums including photos, web clippings to notes. The mobile app means those follow-up thoughts are never lost on the journey home. They are also useful for feeding back to the team when everything is collected in one place.

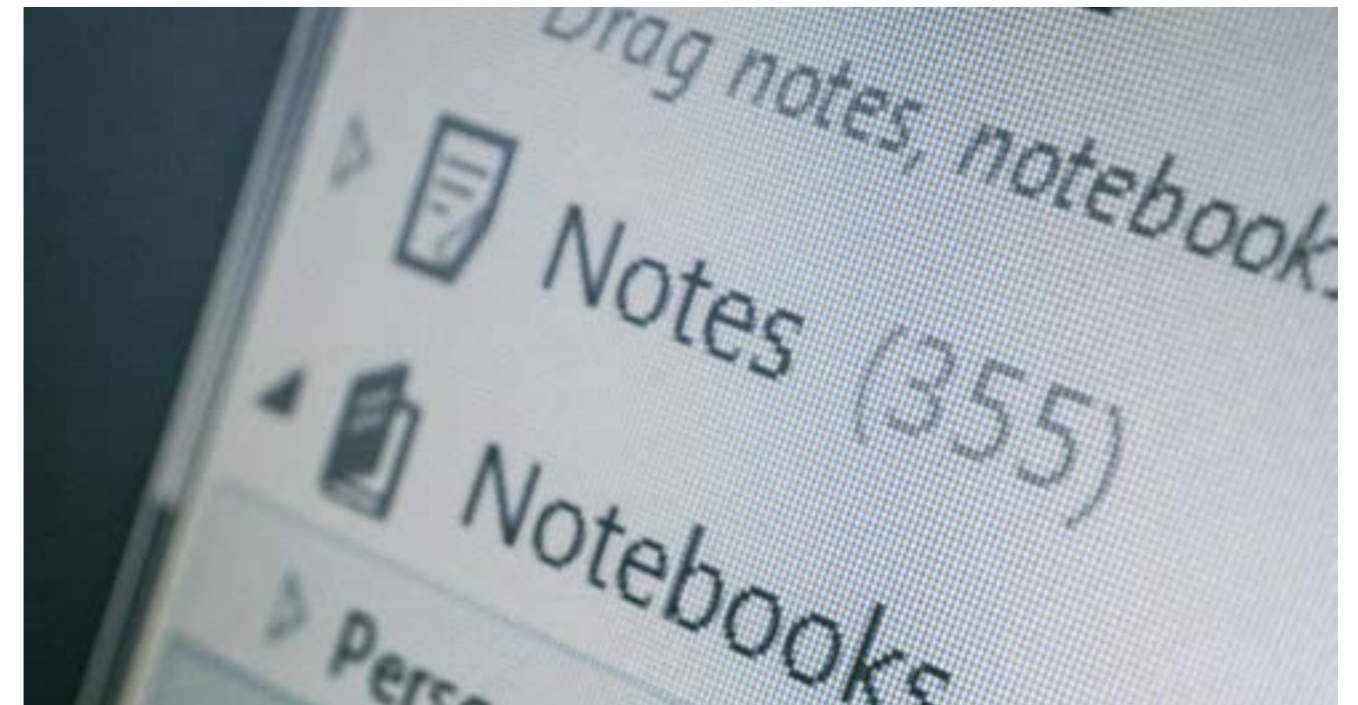
Sorting and translating Information

- › **Empathy Research Framework** to sort and translate customer research into key categories to understand their perspective: Observations, Tensions, Surprises and Key Quotes.
- › **Microsoft Excel** to collect, sort and categorise comparative qualitative and quantitative data.
- › **Adobe Illustrator** to visually and diagrammatically represent information

Reporting and presenting outcomes

- › **Microsoft Word** to formally report the approach and outcomes. The in-built citation tools are good at indexing data to the source
- › **Microsoft Powerpoint** to present the research approach, findings and insights through compelling storytelling

Below: digital notebook can work just as well as physical ones – they also allow your team to have visibility over all collected notes.





Change is the only constant

Developing a new product or service and taking it to market is one of the most difficult things you can do. There are a lot of variables and things are constantly changing. We have developed processes that recognise this and work with it, not against it.

The first principle of innovation: change is the only constant

Creating a culture that rewards dynamic thinking and embraces the likely event of change will deliver benefits for your company. It is important to celebrate the concrete milestones alongside a team's flexibility and embracing a plan that can change with opportunity. This document reinforces what we believe are the four tenets of innovation:

Research

Pursue knowledge, to drive understanding and insight.

Structure

Create a structure to support your activity that is capable of change.

Culture

Encourage a culture that rewards dynamic behaviour and thinking.

Creativity

Often has the solutions to change so encourage it in your workplace.



locusresearch.com
daniel@locusresearch.com
+64 7 577 1650

We believe in the power of research to explore, learn, discover, and create.

Our cross-functional design team uses research to deliver insights, develop products, and improve the outcomes of innovation in business.

We are a product development and innovation company that works with you to deliver world class products to market.

Curious about how we can help you and your business? Get in touch.