

Service Design Research

International collaboration to explore and develop a new service concept

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This case study describes a project commissioned to STBY and her partners in the REACH Network for Global Design Research by a major technology company. The client team were interested to explore two things: whether a new service concept they were developing met the needs and interest of several distinct target groups, and which aspects of this concept would best match with the everyday lives of these consumers. The research project STBY designed involved engaging with over 120 participants in 3 different global locations through both User Experience Labs and Ethnographic Immersions, producing a series of Design Documentary videos, and presenting the results to a large number of internal stakeholders.

Focus of the design research

The project had two distinct goals, meaning careful thought had to be put into the best methodology to adopt. Firstly, a new early stage concept direction had to be introduced to several different groups of consumers in order to elicit their feedback as to its purpose, design, functionality, price, availability, and intended context of use. This new service concept consisted of a new technological device combined with a range of optional service elements. As, at the time of the design research project, the service concept only consisted of a non-functioning prototype, a series of creative exercises had to be developed that would allow participants to explore future potential usage of the device and the intended services in the detail required.

The design research project also sought to explore the wider context of use around the new service concept. This required a markedly different approach, as material had to be gathered which would allow the concept itself to be analysed in relation to people's everyday behaviours, routines, aspirations and apprehensions. It was decided at the outset that the project should maintain a global focus. Both of the design research goals were to be examined in 3 global locations (UK, Spain and Russia), with the insights gathered allowing the client team to separate local cultural influences from universal responses when analysing the results.

As is often the case, this all had to be achieved within a short timescale – only 6 weeks were available before a final presentation needed to be made to internal management teams.

Recruitment & selection of research participants

Due to time constraints and the sheer number of participants, STBY recommended that a professional recruitment agency would be used. At the outset the client provided a range of characteristics for the different groups they would like to get feedback from. STBY worked with the client team to refine the recruitment profiles in relation to the project's goal, in order to ensure that the aims for the design research could be met. Once this had been agreed, the completed detailed set of person specifications were sent to the recruitment agency along with an agreed timescale.

Regular contact with the agency is vital throughout this process in order that the emerging sample can be fine-tuned before participants are finalised. Thorough documentation of this process meanwhile meant the recruit could be repeated along similar lines in the other research locations, achieving a consistency in the global sample which is crucial for any subsequent analysis.

Consistency is not achieved via rote repetition however; local cultural factors which may otherwise skew a research profile also need to be taken into account. This requires close collaboration between local partners – each an expert in their regions culture – and the wider project team. STBY's role in this process is to ensure that the needs of the client are effectively interpreted within this local cultural context – design research cannot simply be 'cut and pasted' from one location to the next.

Recruiting over 100 people in 3 different countries within such a short timescale was a significant logistical challenge. In such a situation, the process can only succeed when all the actions undertaken are done so with

the ultimate aims of the project in mind. This means working closely with the client team to solve challenges and interpret new information; all of this in an atmosphere of collaborative acceptance of solutions. Dealing with language issues, local cultural factors, location problems and last-minute adjustments to the sample each presented their own challenges to this project. Ultimately however, a complex sample based around a variety of demographic and socio-economic variables was recruited both on time and on budget.

Refinement of the Design Research Plan

A design research plan is a detailed specification as to how the aims of a project can be met within the timeframe and budget available. An initial kick-off meeting with the client team allowed the design research team to garner a deeper level of insight as to what they ultimately hoped to achieve. This is only possible when working in an open and collaborative way to 'fill in the blanks' of a more generalised Request For Proposal (RFP). Rather than developing the design research plan as an overly prescriptive set of 'rules' which aren't flexible enough to be continually useful as a project evolves, STBY's preferred format is to produce a set of 'Design Research Guidelines'. These guidelines cover each step in the proposed process, outlining both the activities to be undertaken and the intended outputs of each of these stages. This provides a flexible framework for the project which can be used to orientate other stakeholders – be these design research partners or colleagues within the client team – in the design research process.

The benefits of this approach are usually very clear once the project gets underway. The guidelines act as a common point of reference for both design research and client team, ensure a consistency of approach across locations, and provide a clear indication of the various design research materials which needed to be developed.

Development of the Research Materials

In order for the User Experience Labs to prove useful, the invited participants had to be probed as to their behaviours, needs, and motivations in relation to the service concept in a manner which would provoke insightful, engaging, but still accurate responses. This was achieved via the development of a range of bespoke design research materials, each of which were integrated into the design research plan in a manner that ensured they worked in-line with the ultimate aims of the project. This meant making sure each tool supported the next stage of the design research. The materials produced for the User Experience Labs had to generate structured results which could be quickly and easily interpreted during a collaborative workshop. They also had to support the 'translation' of the insights from 3 different countries into a common 'language' that could form the basis of this analysis.

This involved working with a variety of different materials. Participants completed paper exercises, worked in small groups to build and construct models, and even developed their own imagined customisation of the service concept which they were asked to present on video. To use such creative tools effectively is one of the challenge of design research, one which was managed by each of the local design research teams in close alignment with STBY and the client team.

Series of User Experience Labs

The data collection in this project was a multi-stage process, in which an initial series of User Experience Labs held across 3 global locations saw the design research team work with around 120 different participants. Several people were then selected from this wider group for a series of ethnographic immersions which focused even deeper on their motivations, behaviours, aspirations and apprehensions concerning the technology involved.

The User Experience Labs organised for this project saw several different profiles of consumers invited to group sessions in which their relevant behaviours, routines, and perceptions could be explored and recorded. The emphasis when organising the sessions was to make this experience as engaging and interactive as possible. A series of unique exercises were prepared beforehand, each of which was carefully designed to elicit thoughtful responses to the service concept, whilst also provoking and maintaining the interest of the participants. Sitting quietly at a table and filling in a questionnaire is not something most people enjoy, nor is it likely to prompt any useful degree of reflection on such a complex subject as a future new service offering.

The emphasis placed on engagement however also extended in this instance to the client team. Drawn from a predominantly marketing background, they were used to observing such sessions from behind a screen, whereas STBY's approach instead favours more involvement in the sessions and direct contact with the participants.

The sessions were run with groups of around 10 people, split into smaller subgroups for some exercises, and coming together for plenary discussions at various points in the programme. Moderated by the design research team, these sessions facilitated an open, collaborative, but still focused exploration of the topic at hand – one which could be consistently replicated across the regions involved. The exercises were designed to capture and structure initial insights on paper and video, with these being further explored in the ethnographic immersions which followed.

Ethnographic Immersions & Design Documentaries

A subsequent round of ethnographic immersions allowed the design research team to explore in even more detail some of the findings from the User Experience Labs. The groups sessions had allowed the team to identify the most promising candidates for the immersions, whilst the participants themselves benefitted from already having been introduced to the topic in the labs, the new service concept. This is one of the key strengths of designing research around multi-stage participants contacts.

The ethnographic immersions also served as a way to illustrate some of the findings from the User Experience Labs; by structuring the interviews around the creation of a series of Design Documentary videos, the team was able to curate a repository of films that examined the potential usages of the new service concept from a number of real-world contexts and perspectives.

As well as further enriching the material gathered in the User Experience Labs therefore, adding another level of detail that could only be derived from speaking with people at length in the environments where they typically make use of services relevant to the topic of this project, the documentaries created also served as an engaging and resonant introduction to the themes which had started to emerge.

Initial Review & Analysis

The initial review stage of this project was designed as a joint ‘pre-analysis’; an opportunity for the design research and client team to involve themselves in the emerging insights and ensure the final results are intimately focused around the project’s objectives. In this instance this meant working with the core client team to define and curate the potential Design Documentaries which could be edited from the material collected during the immersions. A 3-hour interview will generate a great deal of material, which can be filtered and interpreted in a number of ways and also used to tell a variety of stories. This stage in the process involved an initial review of this material by STBY and her partners, before they make suggestions as to which of these stories they’d like to tell, the final decision then being made in collaboration with the client.

The benefit of this approach is that the client team is able to gain an early understanding as to the type of insights which might emerge, whilst also gaining another opportunity to further focus the work on the issues at hand. When completed correctly, this step in the process allows the team to move smoothly and quickly into the subsequent synthesis and reporting stage.

Synthesised Analysis in Collaborative Workshop

The final analysis stage of this project again moved through several distinct stages. The synthesis of the emerging insights was conducted in an interactive workshop that brought together all 3 design research teams, as well as the core client team, together with several other stakeholders from within the client organisation. This workshop allowed the refinement and consolidation of insights developed from the research material, which were then visualised into a poster, collected into an illustrated report, presented to a large audience, and finally summarised in a compilation film.

In the collaborative workshop the results of both the User Experience Labs and the Ethnographic Immersions were synthesised into a series of insights and opportunities related to the research objectives. Successfully running such a workshop requires careful preparation, throughout which attention must be paid to a number of different factors. Firstly, the workshop should always be designed around the people who will be participating. In this instance the core client team wanted to use the workshop to introduce a number of colleagues from various departments (marketing, strategy, design) to the research, and involve them in the analysis. STBY meanwhile ensured that the design research teams for each location were also present, further enhancing the local cultural perspectives present in the research material that had been collected.

Working with small groups from diverse backgrounds can be a challenge, with several different voices and perspectives being an inevitable part of collaborative analysis. Working with video however means the research materials can serve as an engaging and empathic common reference point for the topic being examined. The workshop was structured around watching a curated selection of these videos in small groups, with the

analysis being structured around direct references to evidence present in the films. This helps anchor discussions in real-world examples, and helps keep diverse teams focused on the issue at hand. Obviously constant attention must be given to the overall aim of the project; the workshop is little use if it does not produce coherent results that contribute to the research's ultimate objectives. The exercises developed in this case therefore were focused on producing synthesised insights developed from both User Experience Labs and Ethnographic data, and also designed so that these results could be combined into a structured overview of the insights and opportunities which were created. The benefit of placing such an emphasis on output within this collaborative context is the greatly enhanced ownership participants feel towards the results, and the ease with which these results can then be communicated to a wider audience.

Visualisation of Opportunity Areas

The clustered and structured insights and opportunities produced in the workshop were best communicated via visualisation into a poster which provided a highly engaging overview of the results achieved. Processing the results of the workshop into a poster provided an easily accessible visual overview of the main findings. This 'at a glance' introduction to the initial results proved to be highly useful when communicating the results within the client organisation; achieved in part via a debrief presentation delivered simultaneously to a high number of employees worldwide.

Presenting the results in this visual way allowed us to introduce a large audience to the work. Integrating video material from both the Ethnographic Immersions and the User Experience Labs meanwhile provided a much more empathic link to the evidential foundation of the work than is possible from a written account alone.

Final Report and Compilation Film

Making sure the final delivery of a design research project is successful and relevant to all stakeholders requires close collaboration with the client team. The final reporting in any project should not only be concerned with producing a structured account of the work undertaken; thought also needs to be made as to how the results can be communicated to new audiences, and how the materials generated can be of future value to the client organisation. The report and presentation STBY designed in this instance went through several iterations to make sure they were focused upon current internal priorities. Moreover, the addition of video and a Q&A section to a presentation simultaneously delivered to 6 global locations required careful logistical preparation. Once completed, the ultimate goal of the project was to provide a final account of the results to a wide range of international stakeholders; this meant creating both an illustrated report and editing a final 'compilation' film. In addition to a clear account of the insights and opportunities identified in the design research, the report produced for this project also included an extensive documentation of each step undertaken, taking care to explain the methodology employed so that the evidential foundation for the results obtained was clear. As a visual appendix to the report, the team also revisited the video material gathered during the data collection stage in order to re-edit a longer compilation film that gave an engaging overview of the projects results. Unlike the individual design documentaries produced from the ethnographic immersions, each of which focused on a particular behaviour which had been observed, the compilation film could move a step further and be constructed around the actual insights or opportunities that had been identified across participants and locations. This provided an innovative, engaging, and genuinely empathic link to the evidence upon which the results are based.

The final delivery for the project included a repository of all edited video material and a range of tool templates which could be used by the client team to repeat the analysis workshop internally, with a variety of different teams. This meant the project delivered both effective immediate results and reusable assets for future follow-up activities.

Long Term Value

The final presentation was well received within the client organisation. It opened the design research process up to a wide audience, whilst the videos allowed the insights gathered to be communicated in a highly engaging manner. The compilation film meanwhile was used in several management meetings higher up in the organisation, effectively encapsulating the headline findings. These results bear witness to the benefits of developing an agile approach to design research that can fluidly adapt and respond to changes.

The project thus resulted in a set of research materials which supported the client team in a number of different ways. Firstly, the documentation of the User Experience Labs provided a breakdown of feedback on the service concept that could be cross-referenced against both consumer profiles and locations. This feedback covered

purpose, style, and functionality of the prototypes that had been introduced, and was elicited using bespoke design research materials, which could also be used in similar future sessions around the world.

In regards to the service concept itself meanwhile, the design documentaries produced from the immersions were used to map a number of further potential opportunity areas. These were in turn used to develop a series of initial related service concepts in the workshop at the culmination of the project. Mapping opportunity areas and detailing these with alternative concept directions in this manner provided a much more cohesive overview of where the original concepts were situated in relation to people's lives. This 'anchored' the feedback from the User Experience Labs into a structured account of people's current usage and activities, adding a behavioural component to the overall service concept being reviewed.

Ultimately, this meant the client team came out of the project with a much clearer view of which markets their service concept was aimed at, what attributes it would need to succeed, and what changes might need to be made. All of these findings could be communicated empathically via the Design Documentaries created.

Agile teams of T-shaped People

The design research team for this project saw STBY coordinating the design research undertaken by her partners in the REACH Network for Global Design Research in Russia and Spain, whilst also conducting the fieldwork for the UK section of the study. This is one of several such collaborations undertaken in the past couple of years, each of which are testament to how agile collaborations can deliver consistent results on a truly global scale.

All of the core team at STBY and her REACH partners are 'T Shaped'; they share a common expertise in design research whilst also each possessing a background in a wide variety of different fields. These range from filmmaking, to graphic, product and interaction design, as well as psychology and organisational strategy. This range of expertise is crucial when tackling complex issues in a collaborative, but agile manner. It's also a characteristic that's maintained across the Reach Network, co-founded by STBY in 2008. This project saw STBY working with Fuelfor in Barcelona and Summ()n in Moscow.

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