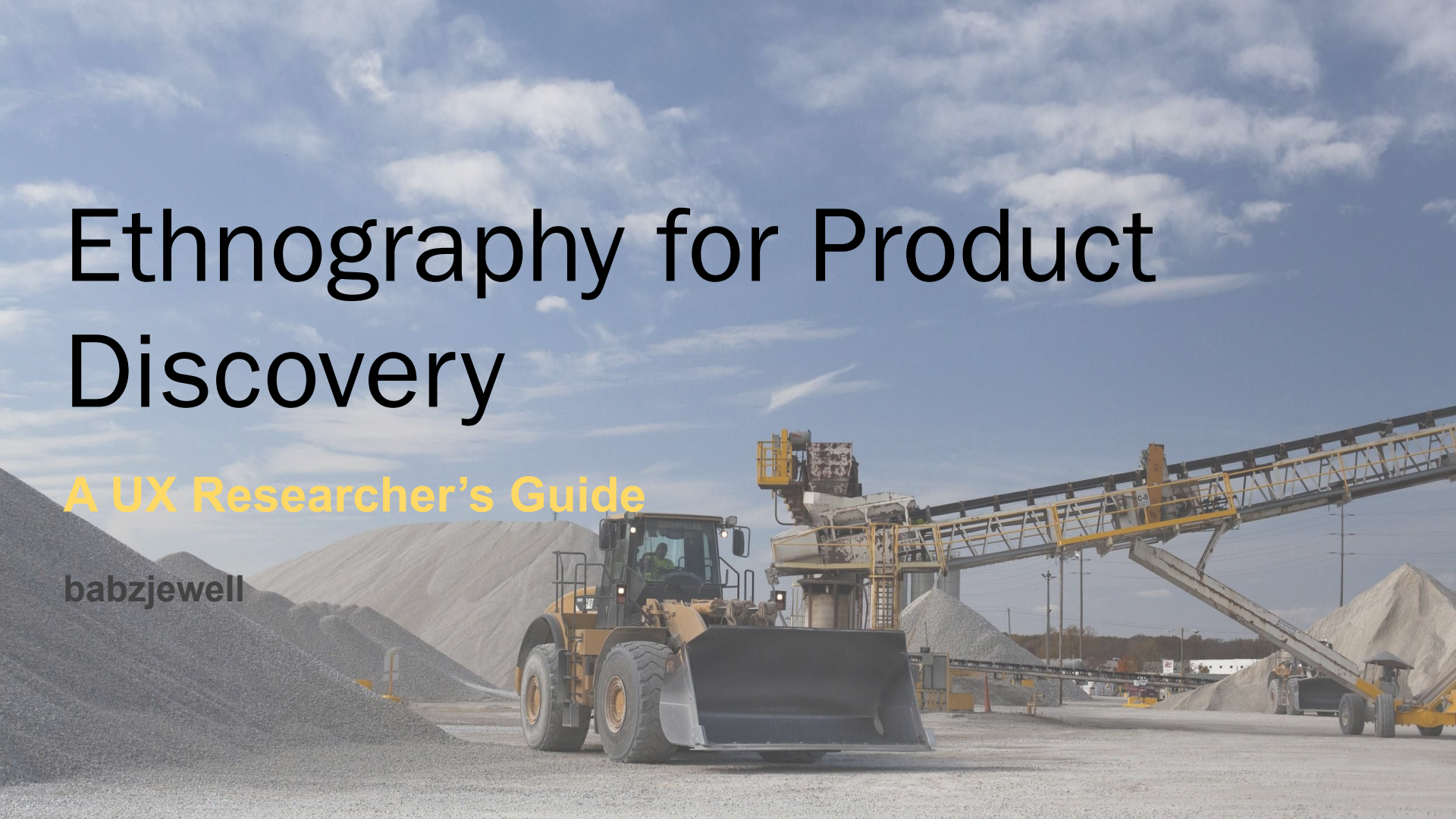
Ethnography for Product Discovery

A UX Researcher's Guide

babzjewell



who dis

babz jewell

ATL + dublin, ireland

gf gf

who dis

How I feel when my Gluten-Free girlfriend goes out of town.

658 points · stats

Submit a comment

save

141 comments sorted by best

expand all

PakiChan 259 points : an hour ago reply
I ate a gluten-free, lactose-free, low carb pizza for lunch today! (It was a raw tomato)

Moosecock 102 points : an hour ago reply
They make gluten-free girlfriends now?

Xd

why am i here

why am i here

>> background:

sociology

dance

photography

german

fulbright fellow

museum studies

>> what’s the fucking point!?

COMMUNICATION.

COMMUNICATION.

Communicating useful insights in a product setting.

what we'll cover

> "This might be a silly question, but...:"
ethnography as mindset and practice

> "Routing," a case study

> outro: on teamwork and buy-in

why r u here

ONWARD !!

“This might be a silly question, but…:” ethnography as mindset and practice

some intro thoughts

institutions + qualifications

some intro thoughts

institutions + qualifications

mindset + personality

some intro thoughts

institutions + qualifications

mindset + personality

objectivity + a necessary fiction

some intro thoughts

institutions + qualifications

mindset + personality

objectivity + a necessary fiction

asking questions

some intro thoughts

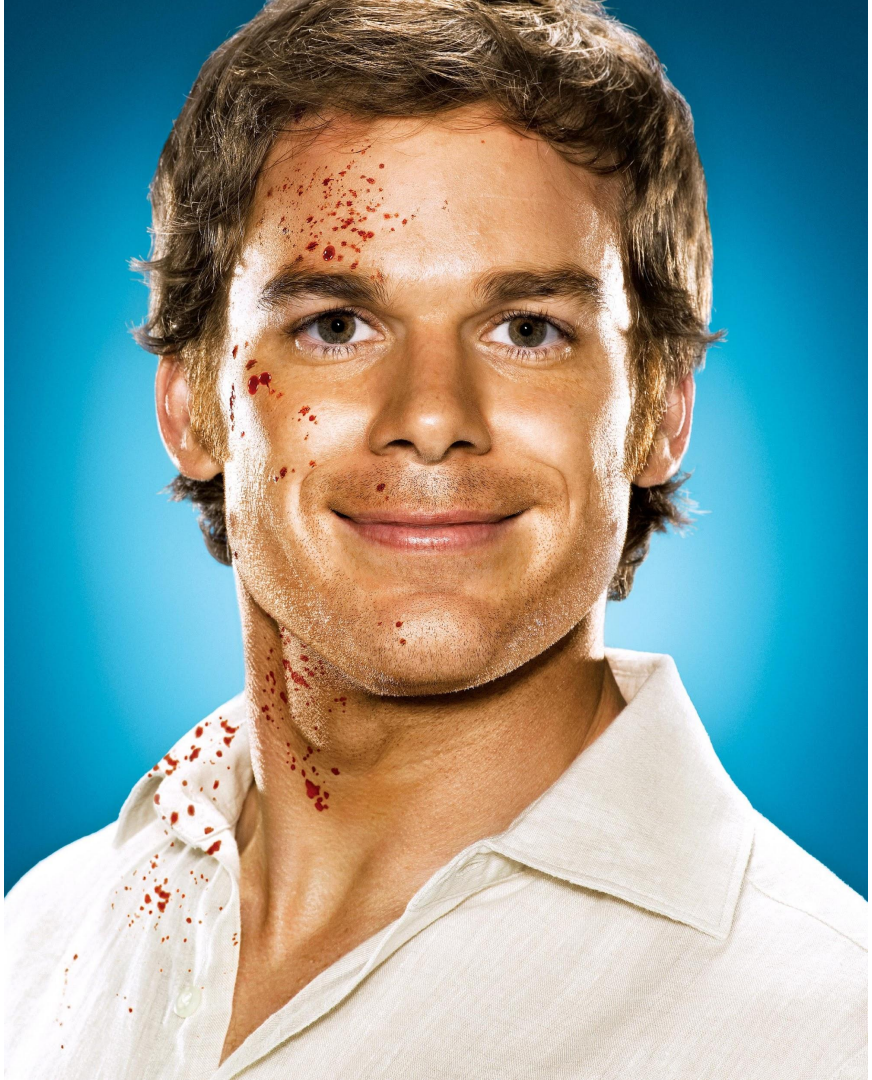
institutions + qualifications

mindset + personality

objectivity + a necessary fiction

asking questions

= *an approach.*



ethnography in practice:

what we do

lean product playbook, dan olsen

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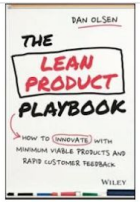

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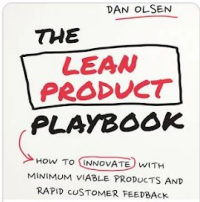

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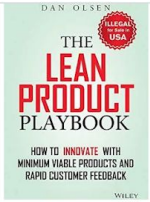

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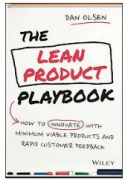

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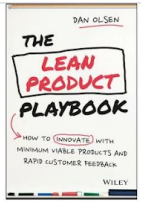

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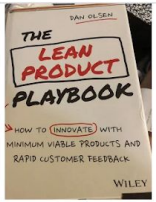

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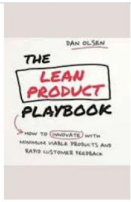

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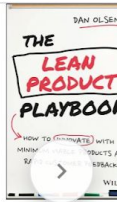

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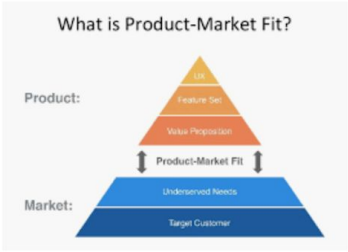

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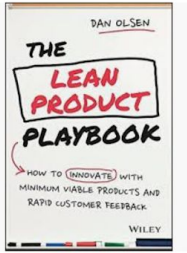

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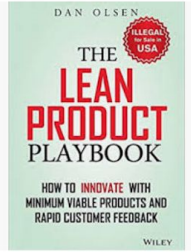

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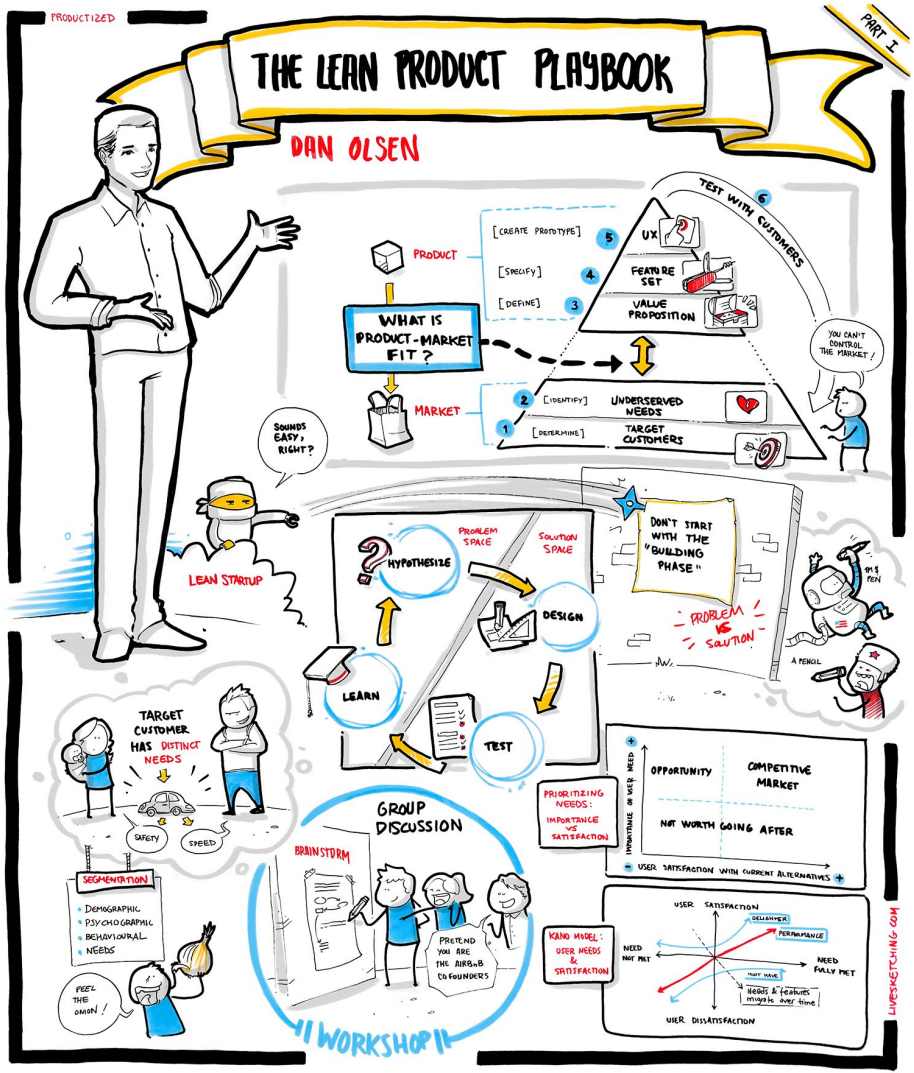
PRODUCTIZED
PART I
THE LEAN PRODUCT PLAYBOOK
DAN OLSEN
PRODUCT
[CREATE PROTOTYPE]
[SPECIFY]
[DEFINE]
WHAT IS PRODUCT-MARKET FIT?
MARKET
[IDENTIFY] UNDERSERVED NEEDS
[DETERMINE] TARGET CUSTOMERS
TEST WITH CUSTOMERS
UX
FEATURE SET
VALUE PROPOSITION
YOU CAN'T CONTROL THE MARKET!
SOUNDS EASY, RIGHT?
LEAN STARTUP
HYPOTHESIZE
PROBLEM SPACE
SOLUTION SPACE
DESIGN
LEARN
TEST
DON'T START WITH THE "BUILDING PHASE"
PROBLEM VS SOLUTION
A PEN
A PENCIL
TARGET CUSTOMER HAS DISTINCT NEEDS
SAFETY
SPEED
SEGMENTATION
DEMOGRAPHIC
PSYCHOGRAPHIC
BEHAVIOURAL
NEEDS
PEEL THE ONION!
GROUP DISCUSSION
BRAINSTORM
PRETEND YOU ARE THE AIRBNB CO-FOUNDERS
WORKSHOP
PRIORITIZING NEEDS: IMPORTANCE VS SATISFACTION
IMPORTANCE OF USER NEED
OPPORTUNITY
COMPETITIVE MARKET
NOT WORTH GOING AFTER
USER SATISFACTION WITH CURRENT ALTERNATIVES
KANO MODEL: USER NEEDS & SATISFACTION
USER SATISFACTION
DELIGHTER
PERFORMANCE
NEED NOT MET
NEED FULLY MET
MUST HAVE
NEEDS & FEATURES migrate over time
USER DISSATISFACTION
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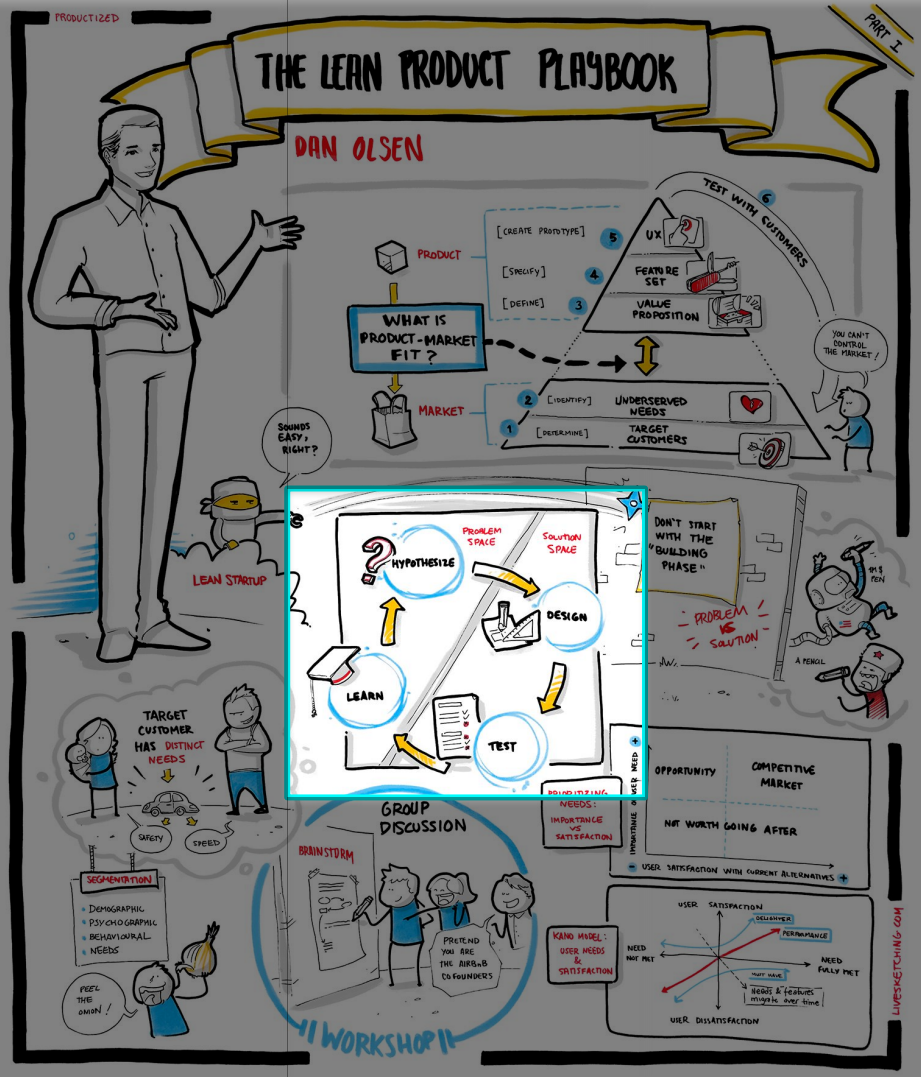
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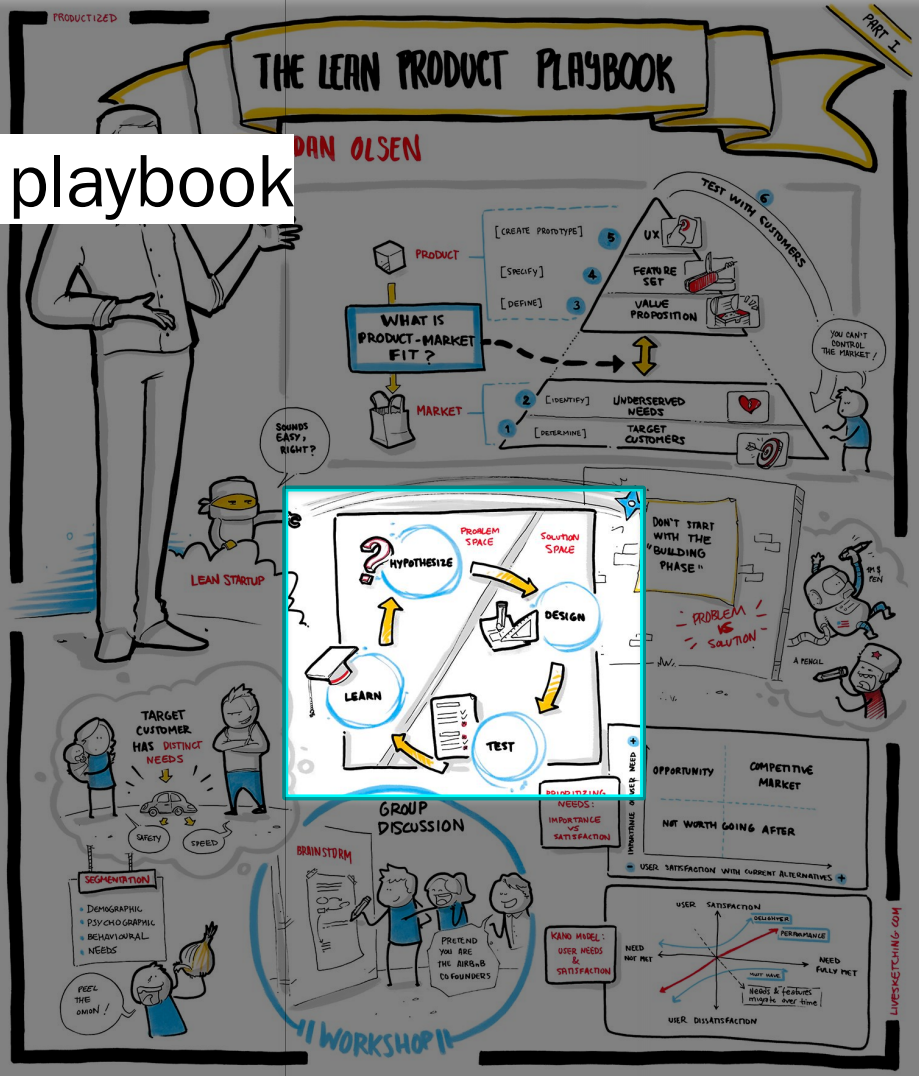
lean product playbook

bonkers fast



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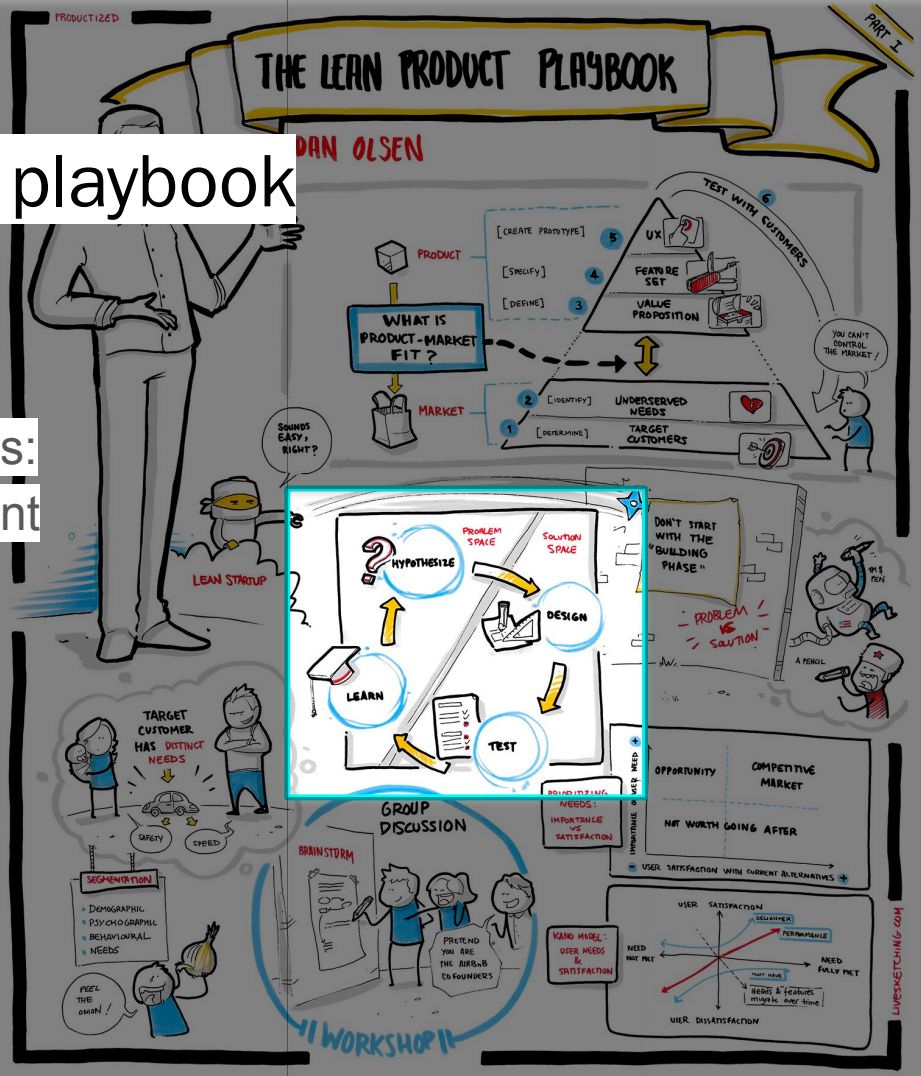
bonkers fast

benefits of templates:

simple start point



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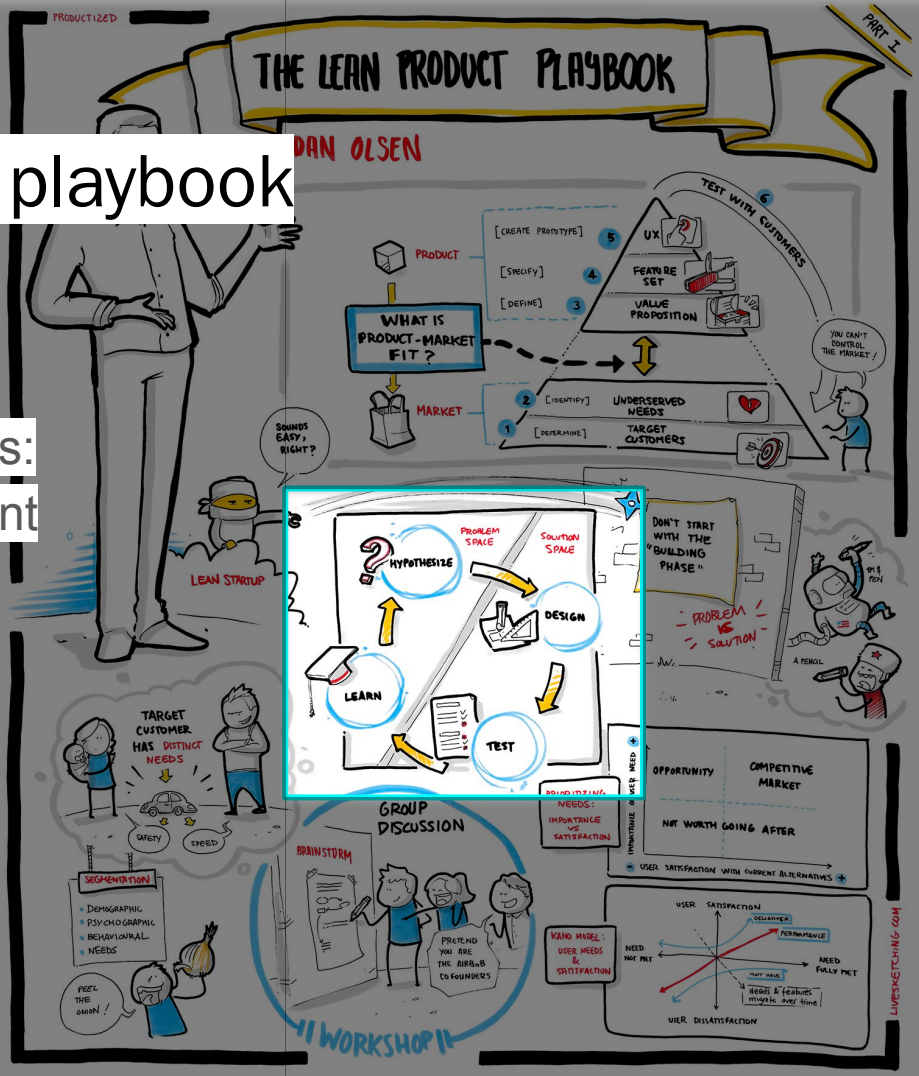
bonkers fast

benefits of templates:

- simple start point
- quick iterations



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bonkers fast

benefits of templates:

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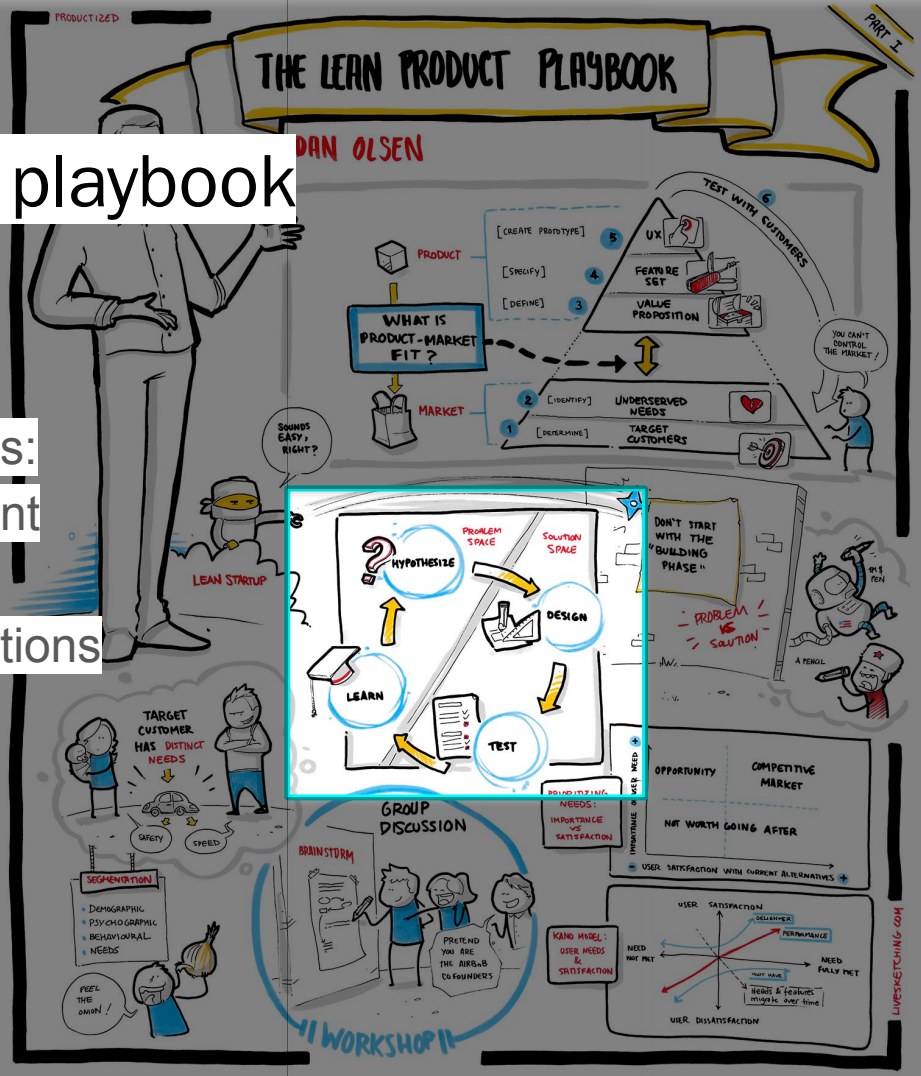
- quick iterations
- testing assumptions



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bonkers fast

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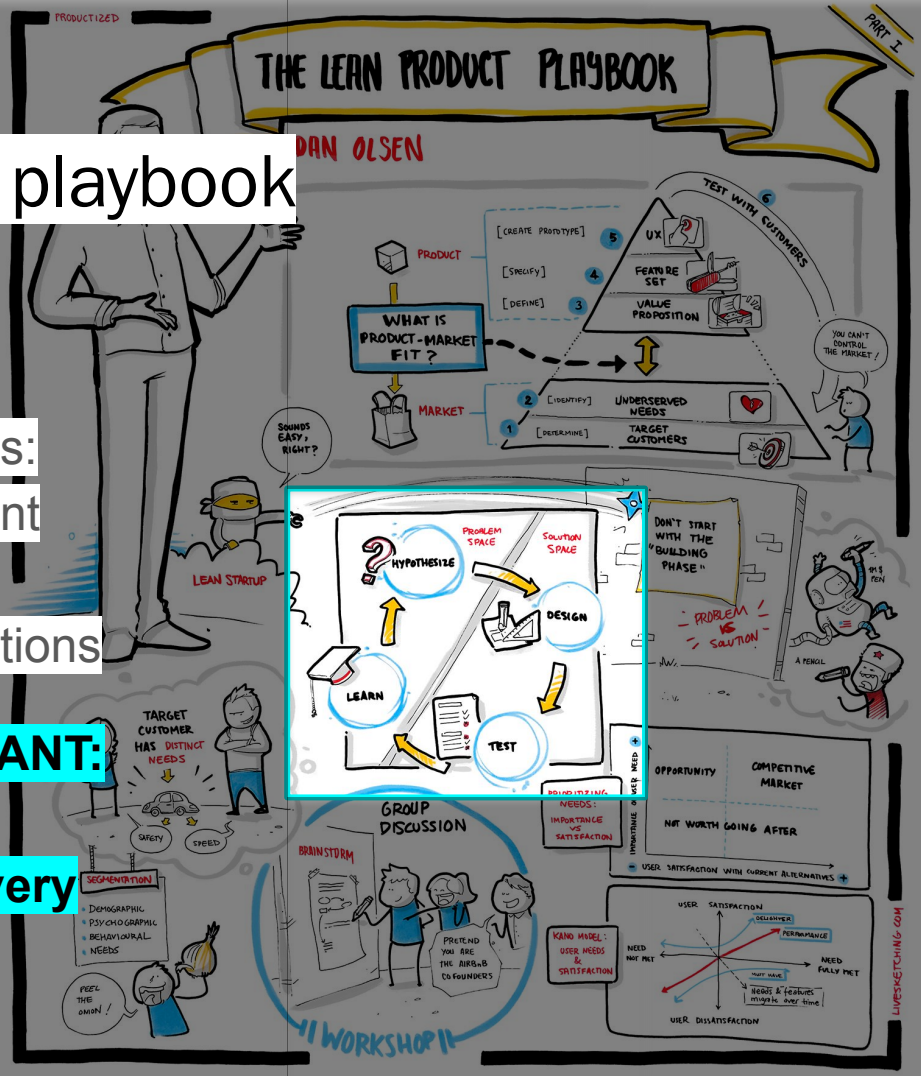
>>> RLLY IMPORTANT:

**** works best with continuous discovery**



continuous... what?

“A critical best practice in Lean UX is building a regular cadence of customer involvement. Regularly scheduled conversations with customers minimize the time between hypothesis creation, experiment design, and user feedback — giving you the opportunity to validate your hypotheses quickly.

In general, knowing you’re never more than a few days away from customer feedback has a powerful effect on teams. It takes the pressure off of your decision making because you know that you’re never more than a few days from getting meaningful data from the market.”

- jeff gothelf's "lean ux"

continuous discovery

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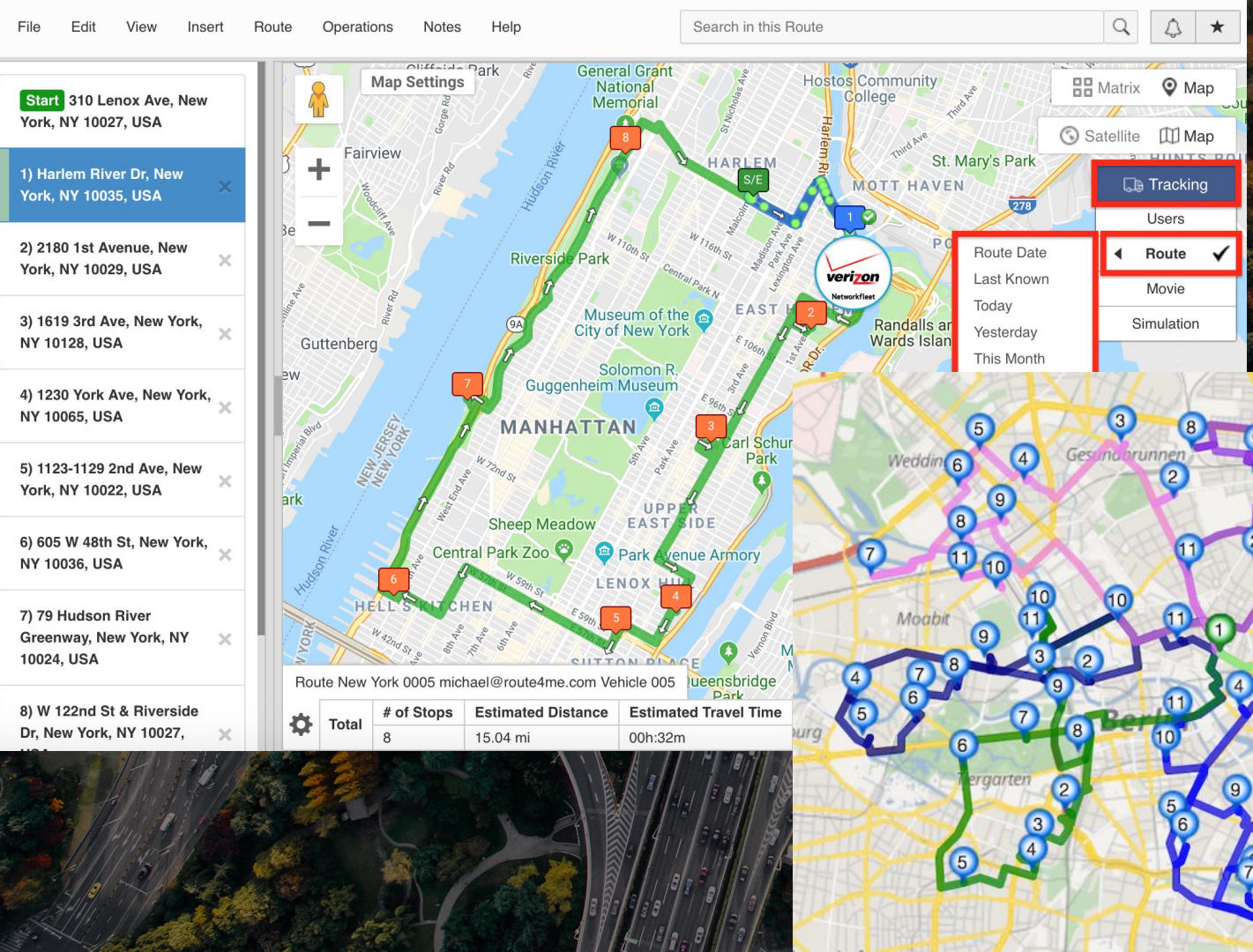
ethnography in
practice:
Route Optimisation:
a case study
by Product Discovery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View
Insert
Route
Operations
Notes
Help
Search in this Route
Start 310 Lenox Ave, New York, NY 10027, USA
1) Harlem River Dr, New York, NY 10035, USA
2) 2180 1st Avenue, New York, NY 10029, USA
3) 1619 3rd Ave, New York, NY 10128, USA
4) 1230 York Ave, New York, NY 10065, USA
5) 1123-1129 2nd Ave, New York, NY 10022, USA
6) 605 W 48th St, New York, NY 10036, USA
7) 79 Hudson River Greenway, New York, NY 10024, USA
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Last Known
Today
Yesterday
This Month
Route
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Harlem River Dr
Riverside Park
Museum of the City of New York
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MANHATTAN
Central Park Zoo
Sheep Meadow
Park Avenue Armory
Carl Schurz Park
Hudson River
Route New York 0005 michael@route4me.com Vehicle 005
Total
# of Stops
Estimated Distance
Estimated Travel Time
8
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Problem

Solution

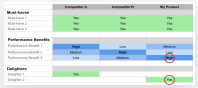
1. Who is the customer?

Identify a market and the customer.

2. What is their need?

Identify a real problem to solve.

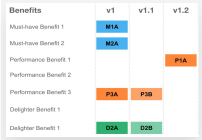
3. Why us?



Are we best placed to solve it?

Does it build on our offerings?

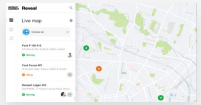
4. Define the Product



Define a Minimum Valuable Product to start.

Consider whether we would build, buy or partner.

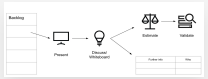
5. Validate with Customer



Test prototypes with customers and their price tolerance.

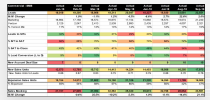
Adjust based on feedback.

6. Is it compelling for us?



With the market, price, fit and solution established - are the numbers compelling enough for this idea?

7. Go / No Go



When compared to the other options we could fund, do we still feel the same?

Define Success criteria & fund the project.

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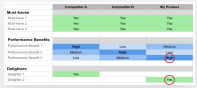

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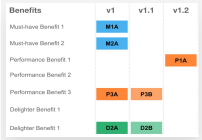

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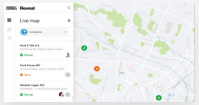

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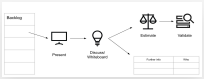

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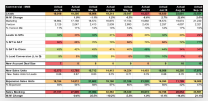

When compared to the other options we could fund, do we still feel the same?

Define Success criteria & fund the project.

playbook canvas

1 Business Problem
What business problem are we attacking and what outcome are we moving the needle on?

2 Target Customer
What types of users and customers should we focus on first?

3 Needs
What problems and goals are customers looking to solve with our solution?

4 Value Proposition
How do we position ourselves in the market and against what competitors?

5 Solution
What product, feature or enhancement ideas may help our target customer achieve their needs?

6 Opportunity
What revenue opportunity is available for us? What will the cost structure look like?

7 Effort
What teams will be involved? What is the SWAG?

Problem Space

Solution Space

playbook canvas

1 Business Problem
What business problem are we attacking and what outcome are we moving the needle on?

- Expanding verticals

2 Target Customer
What types of users and customers should we focus on first?

- Small to Medium
- Customers without logistic planners
- Possibly local trucking
- Delivery & distribution, as well as FS

3 Needs
What problems and goals are customers looking to solve with our solution?

- Get more jobs done
- Spend less time scheduling
- Get more capacity out of my day

4 Value Proposition
How do we position ourselves in the market and against what competitors?

- ????????????

5 Solution
What product, feature or enhancement ideas may help our target customer achieve their needs?

- Interface with other products
- Routing for the month or the year
- Preview optimised route, before committing

6 Opportunity
What revenue opportunity is available for us? What will the cost structure look like?

7 Effort
What teams will be involved?

Problem Space

Solution Space

RO w1 Discussion Guide

SMB Product Discovery/ Innovation Team
Joe Darrer, Ciaran Madigan, Kelle Link, Claire Shanahan, Nevan Prendeville
Researcher: babz jewell

SAMPLE:

1. Drivers/ Field Workers
2. Dispatchers and Planners
    a. Mobile workers or delivery guys > 30+ or 200+ stops/week
    b. SMB FS and Delivery/Transportation sectors

HYPOTHESIS:
See various assumptions we are validating/invalidating in the Research deck >

CUSTOMER DISCUSSION GUIDE: DISPATCHER, PLANNER

US/ EU/ UK CUSTOMERS:
Hi! Thanks for talking with us today about your fleet. We're currently researching customer needs around managing the routes driven by field or delivery crews, so today our conversation will focus around these concerns.

INTRO

1. Can you tell me about your role and responsibilities at your company and in your industry?
2. Can you tell me about your fleet makeup currently?
    a. Vehicles: types and #
3. How many guys would you have to plan for or manage? H13
    a. What staff / co-workers are available to you to manage them?
4. How much / how often do you need to communicate with your drivers out on the road or on their job sites, about their routes, ie. where they need to go? H13
    a. What information do you want from your drivers?
    b. What information do you need to make a route plan?
    c. How many stops do your drivers make in a day?
    d. what is a stop?
    e. what does it mean to customers?
    f. how is stop-efficiency measured?
    g. How are your drivers' efficiency measured?

Babz Jewell

Resolve

what is a stop?
what does it mean to customers?
how is stop-efficiency measured?

Reply...

Key Talking Points

Identify triggers
What problem (if any) do they have around scheduling and routing? What struggles have they encountered? *Have participants talk about a recent example of a struggle/pain they had*

Potential Questions/Discussion Points

- Can you tell me how long it takes to figure routes? How do you do that today?
- What efficiency criteria are you applying? (Fuel? Travel Time?)
- How well would you say you are doing on **meeting your customers' expectations**?
- Is (your) customer wait-time for service delivery an important metric for you? Why?
- What percentage of a journey of your vehicle are loaded at 100% capacity? is this a problem, or not a problem? Why?

Desired Outcomes
What are they trying to achieve IN/ BY PLANNING ROUTES? How would they measure success? Have participants articulate "measures of success" from their perspective

Existing Alternatives
How are they solving this problem today? How did they go about choosing this? How satisfied are they?

Inertia and Friction
What is slowing them down today? What challenges did they have to overcome with the new solution (if they adopted one)? What barriers exist?

What's Next
Are they actively looking for something else? What challenges are they trying to overcome?

w/ Troy R.O.

01.09.20

way diff.

labor fee: assigned to branch

exact locations ONLY ← • Flutmatics; Gruel Cloud

tablet only software iPad + Apple

↳ "boys on a tablet"

constitution: job, A-Finish (start →)

duration for non-apart reason

driver = greyneby

@ 7 stop, still has 30

↳ troubleshooting (@ what point = critical pt.

GC: much of the same data

+ more = directions A-B

"computer says, but I know better"

+ new driver; send directions → driver rescue or help

¿same geo = daily why directions?

- troy tool

+ safety training

VTC / safety v. GC / gruel, + addresses

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turn by turn: same biz = ✓ daily

same hours = ✗

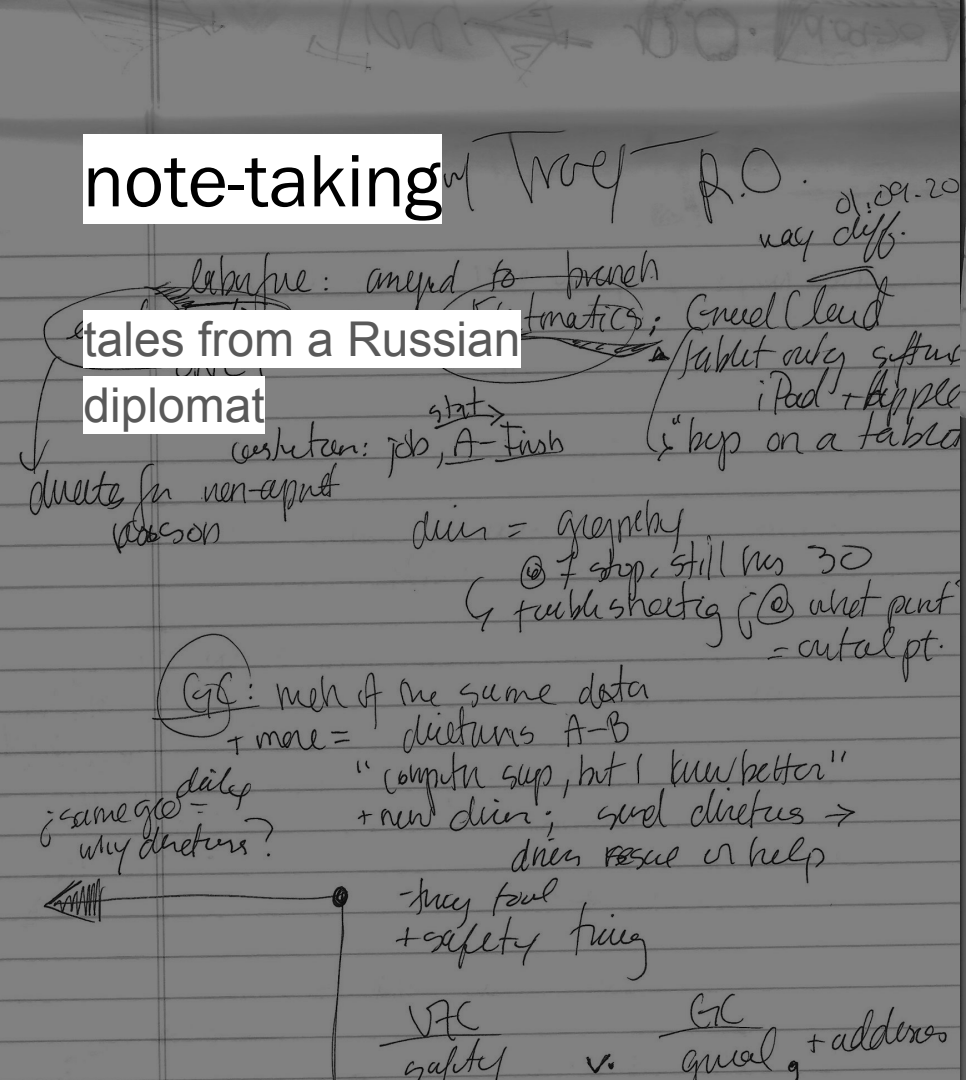
97% = exact place

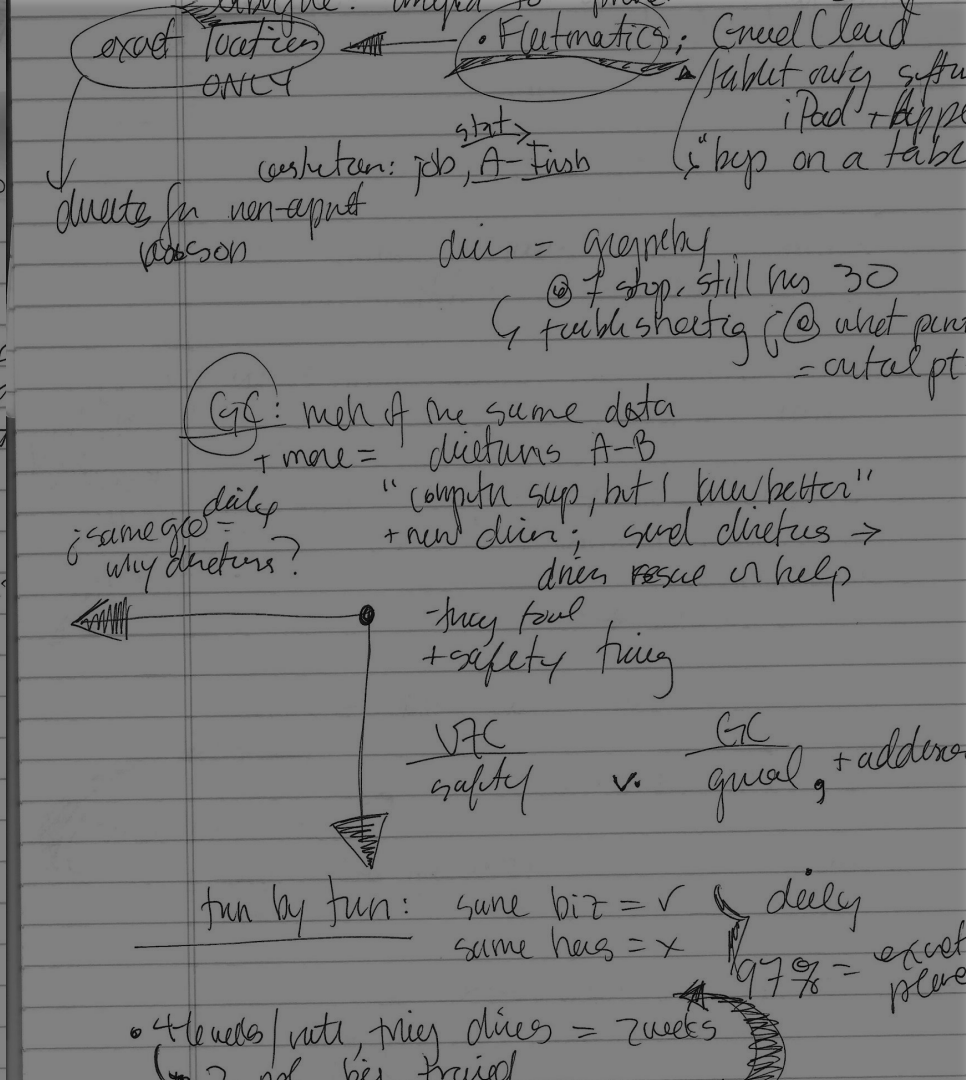
• 4 weeks / rate, trying drivers = 2 weeks

↳ 2 pol. biz trained

note-taking

tales from a Russian diplomat





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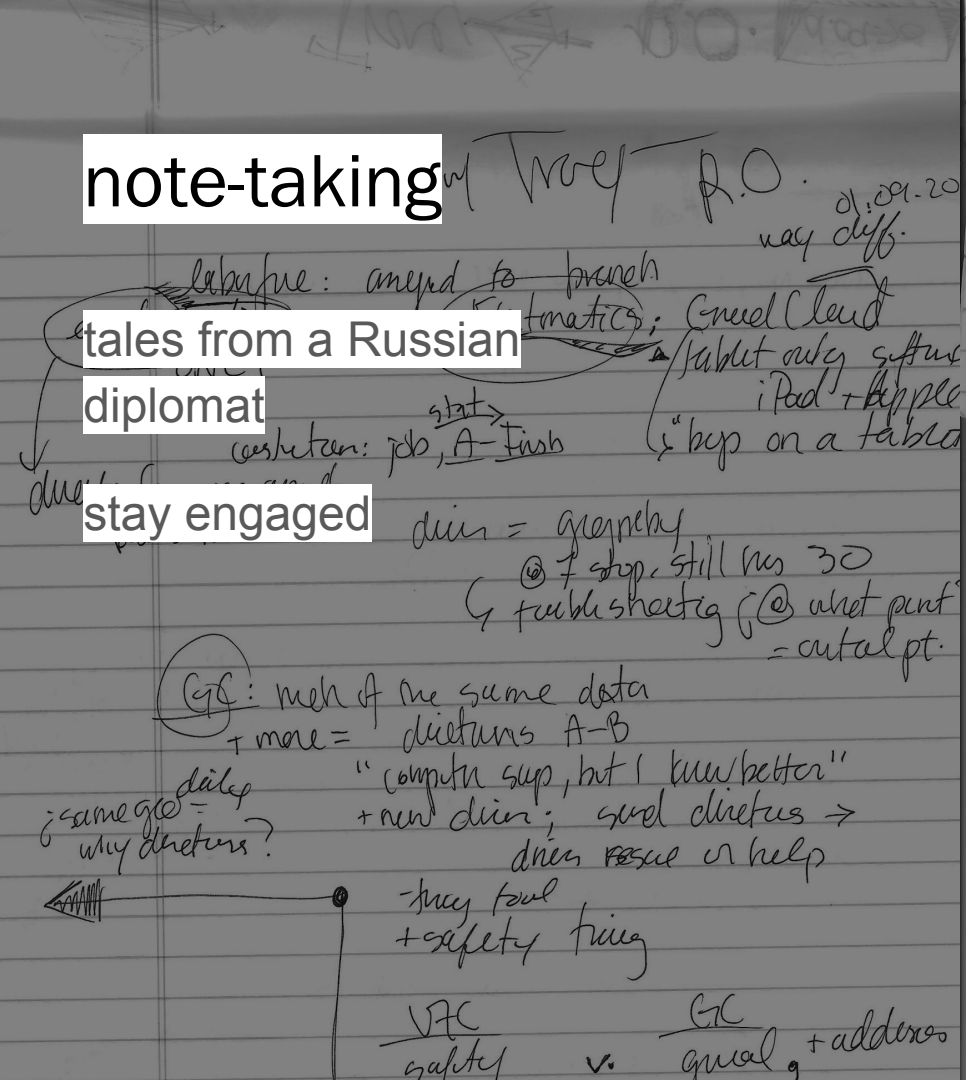
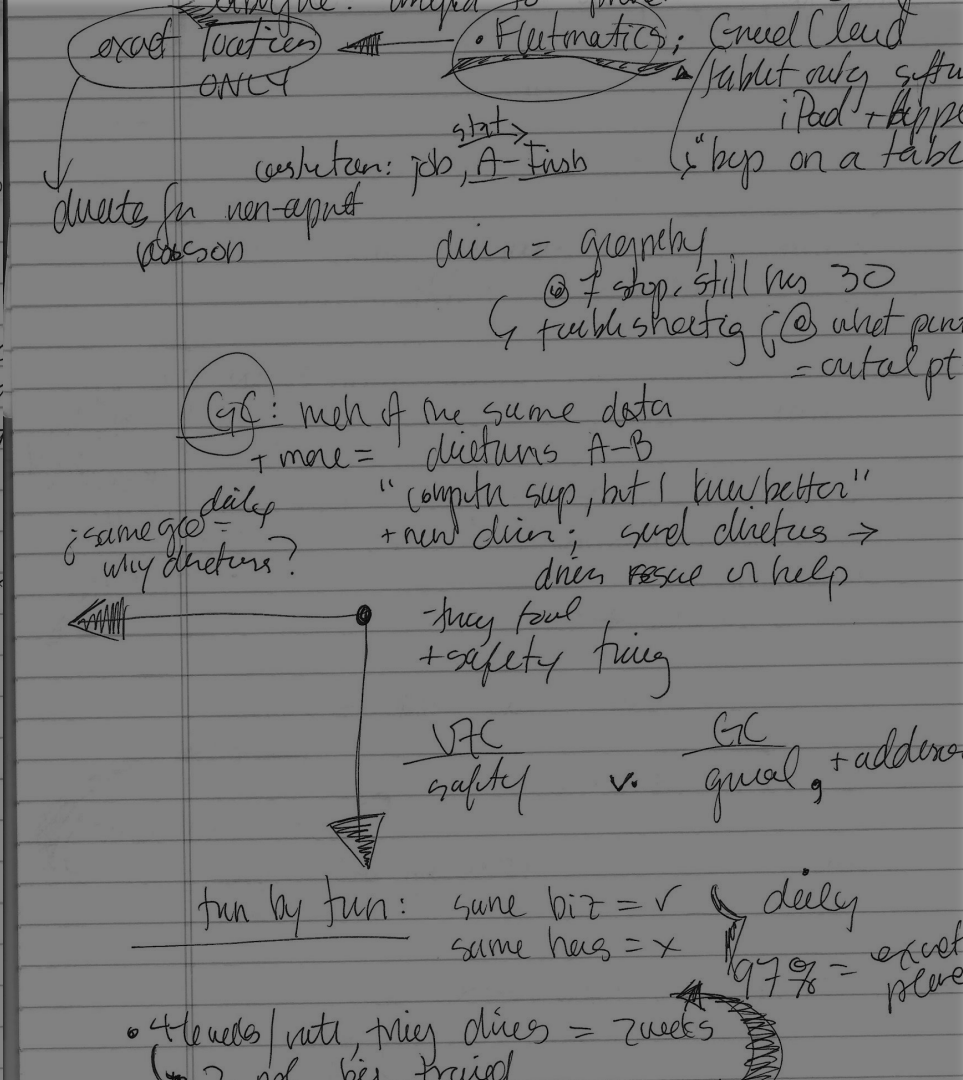
stay engaged





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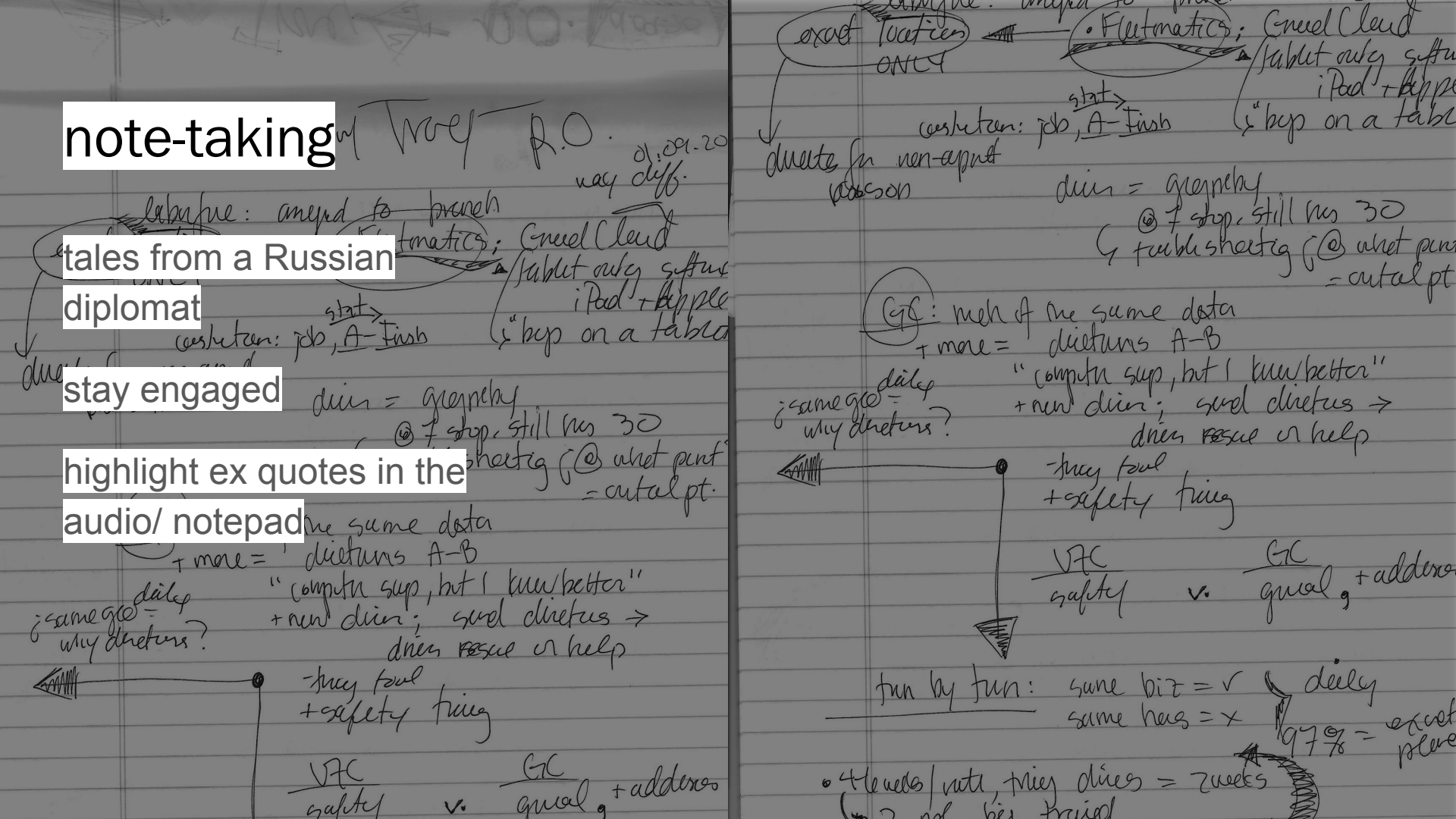
highlight ex quotes in the audio/ notepad



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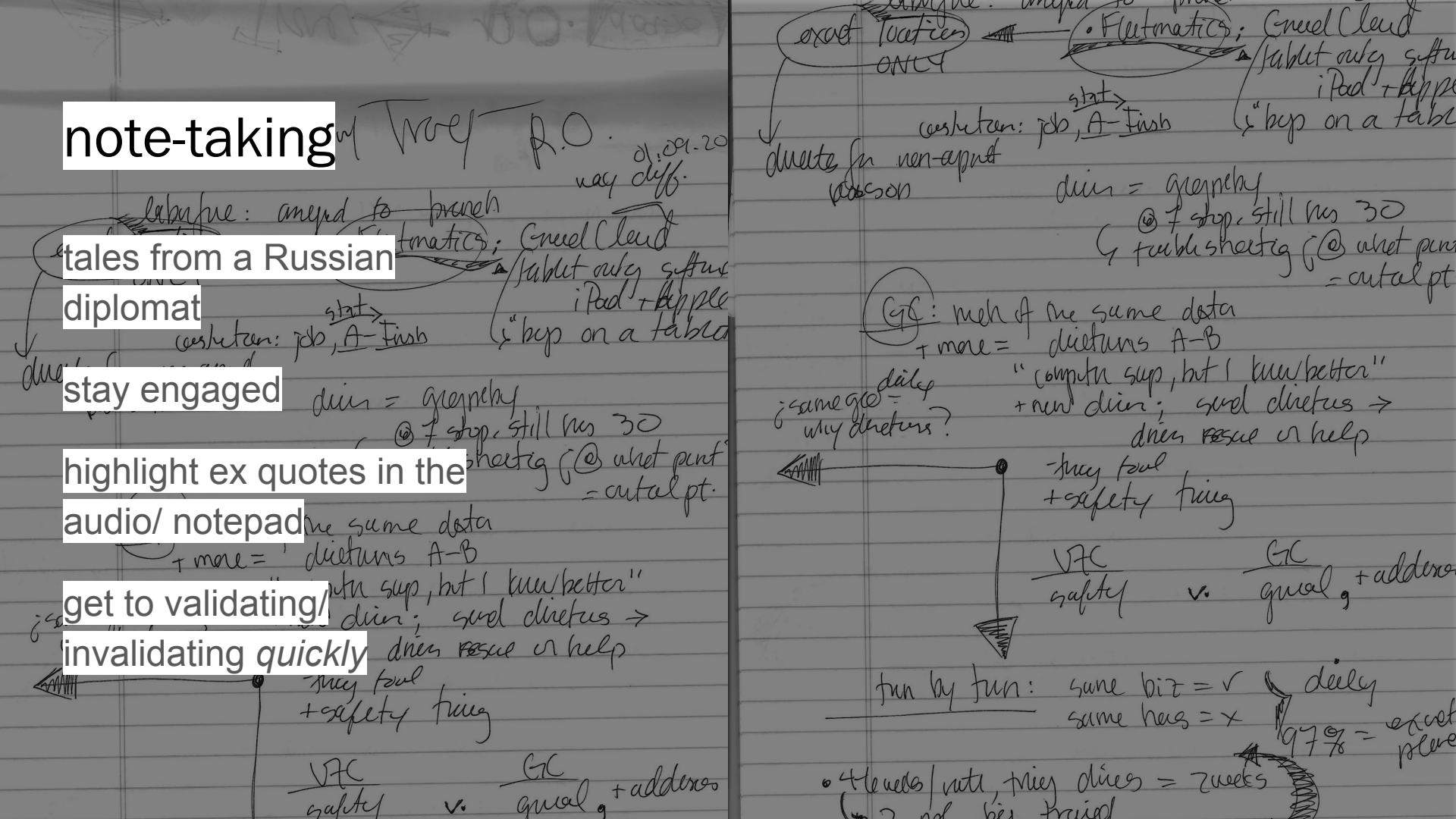
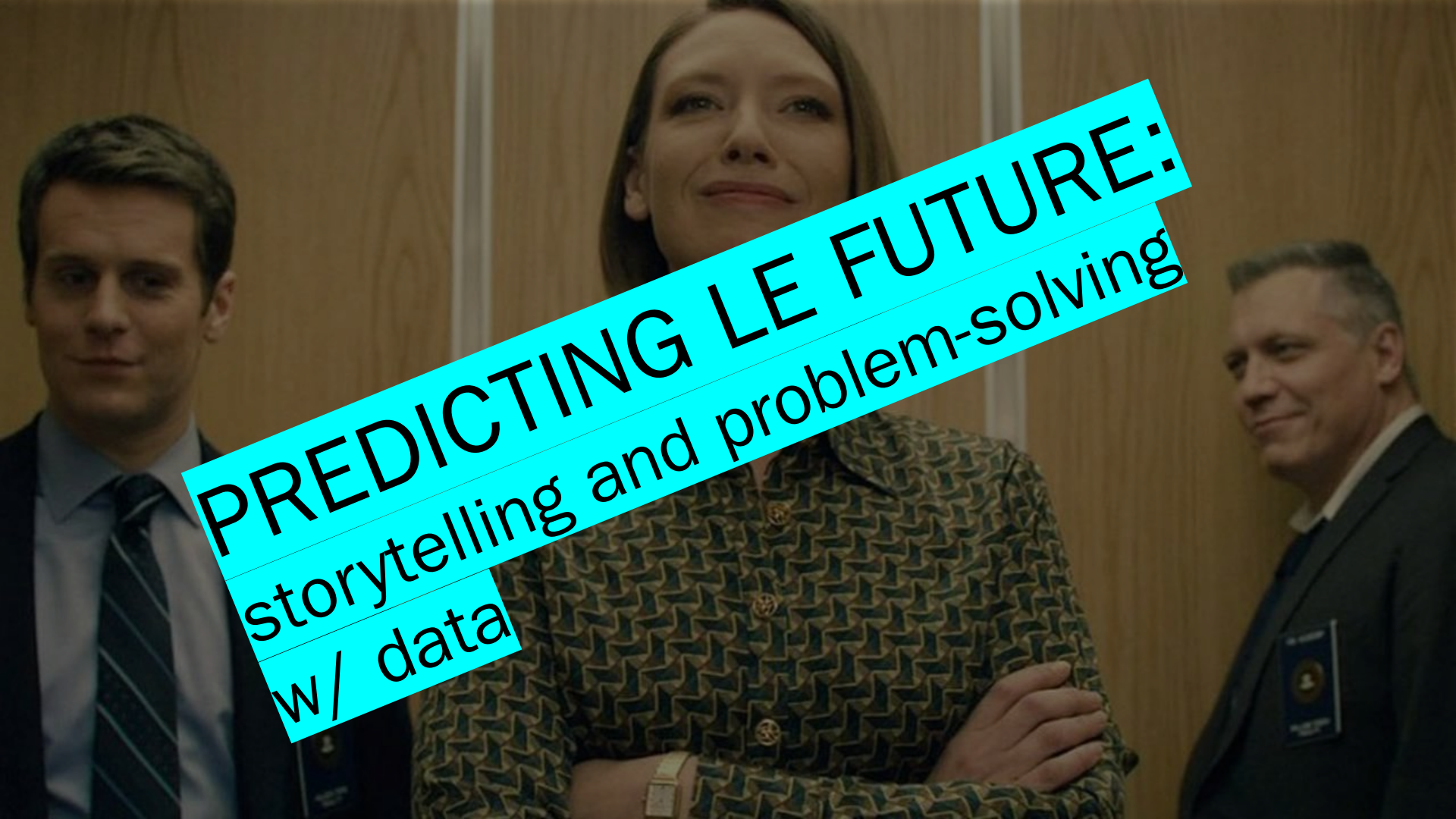
get to validating/ invalidating *quickly*




PREDICTING LE FUTURE:
storytelling and problem-solving
w/ data

nascent findings

1

Vehicle routing for jobs is complicated
I work with many constraints and inherent complexities that make up my business

2

Efficiency is about keeping my customers happy
Satisfying my customers first is ***the most important*** consideration I weigh when meeting my business targets and expanding my business

3

Routing is resource planning for the future
I need to forecast future business challenges, and want help in planning for all eventualities that are routing specific

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jobs

customers

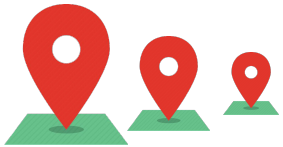
resource planning

jobs

Static vs Dynamic Scheduling

Today's must-do's vs everything else

customers



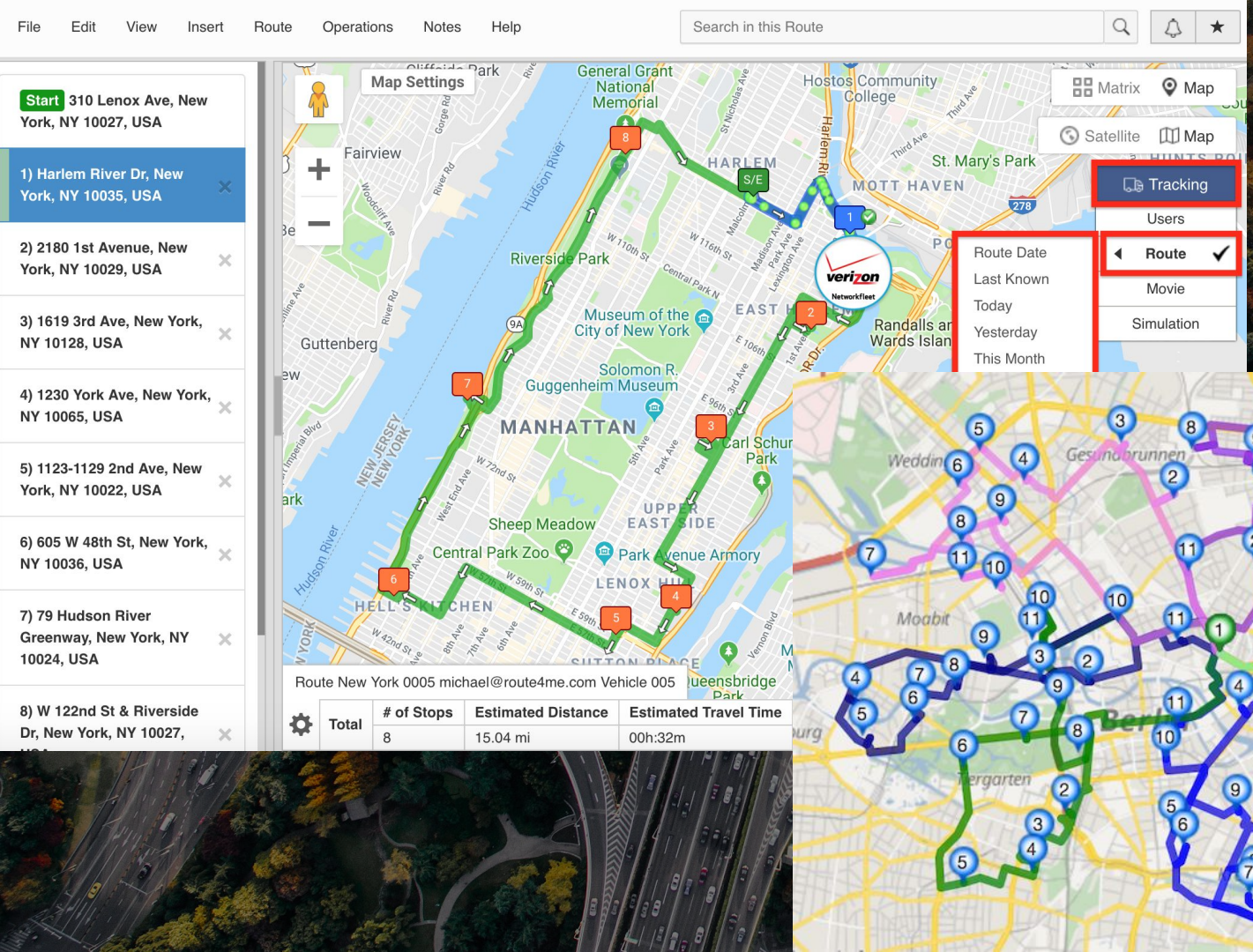
Location, Location

Of my customer, of my guys

resource planning

Dead cows

Equipment, vehicle, load type, skills


File
Edit
View
Insert
Route
Operations
Notes
Help
Search in this Route
Start 310 Lenox Ave, New York, NY 10027, USA
1) Harlem River Dr, New York, NY 10035, USA
2) 2180 1st Avenue, New York, NY 10029, USA
3) 1619 3rd Ave, New York, NY 10128, USA
4) 1230 York Ave, New York, NY 10065, USA
5) 1123-1129 2nd Ave, New York, NY 10022, USA
6) 605 W 48th St, New York, NY 10036, USA
7) 79 Hudson River Greenway, New York, NY 10024, USA
8) W 122nd St & Riverside Dr, New York, NY 10027,
Map Settings
Matrix
Map
Satellite
Map
Tracking
Users
Route Date
Last Known
Today
Yesterday
This Month
Route
Movie
Simulation
Harlem River Dr
Riverside Park
Museum of the City of New York
Solomon R. Guggenheim Museum
MANHATTAN
Central Park Zoo
Sheep Meadow
Park Avenue Armory
Carl Schurz Park
Hudson River
Route New York 0005 michael@route4me.com Vehicle 005
Total
# of Stops
Estimated Distance
Estimated Travel Time
8
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after all...

we’re only here as long as we help our customers accomplish their work.

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our solutions must be inline with their goals, needs + ambitions.

outro: on teamwork and buy-in

… erhm

how do i communicate my findings?

what does output look like?

how do i achieve team buy-in?

what about alignment across my cross-functional team?

“have you spoken to a customer that does X and X while Xing!?”

DO:

collaborate

allocate

be pushy (w/in reason)

keep research transparent

build channels

be fucking good at it

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let things go. answer their questions. advocate for what's surfaced

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#requiredreading

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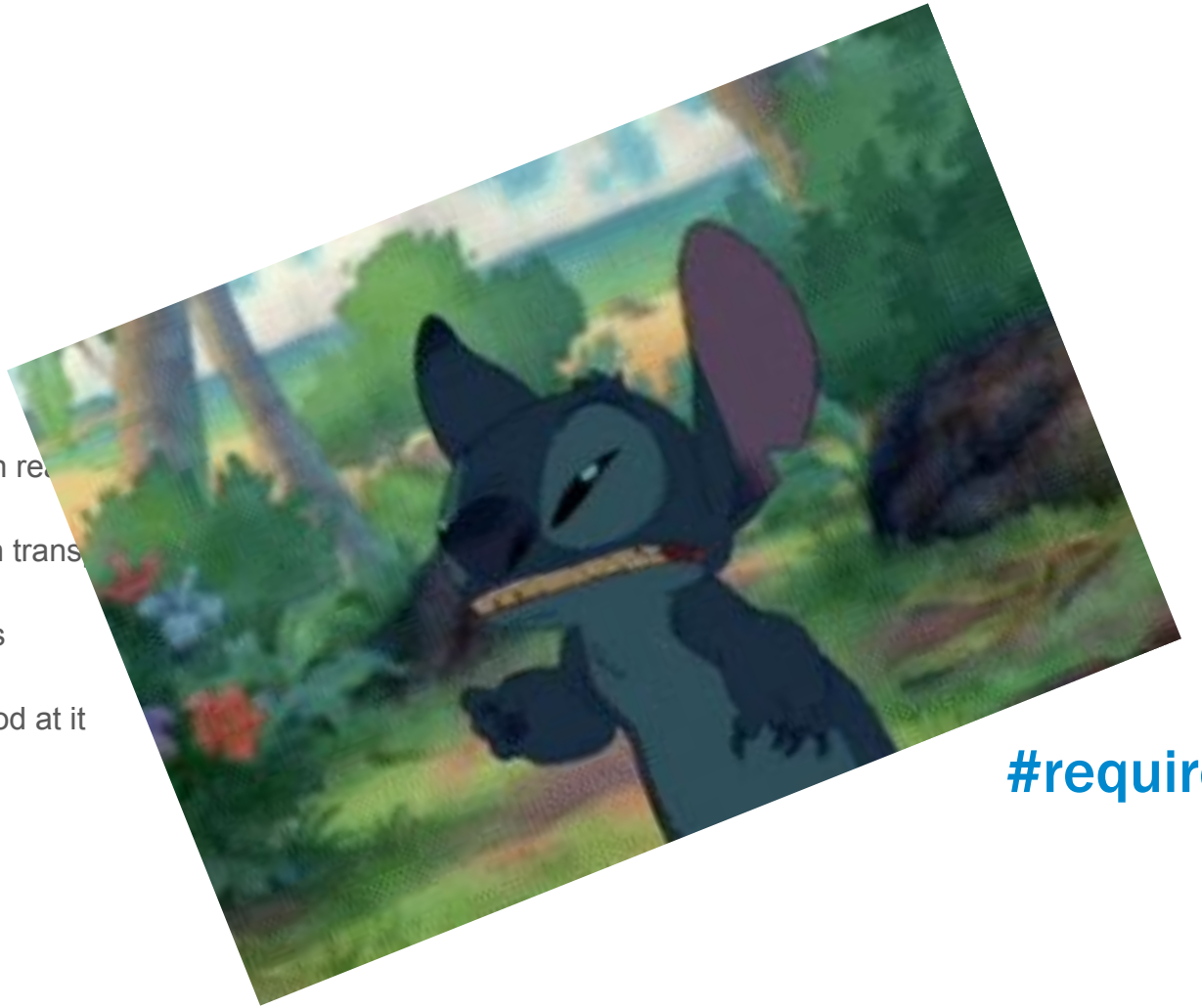

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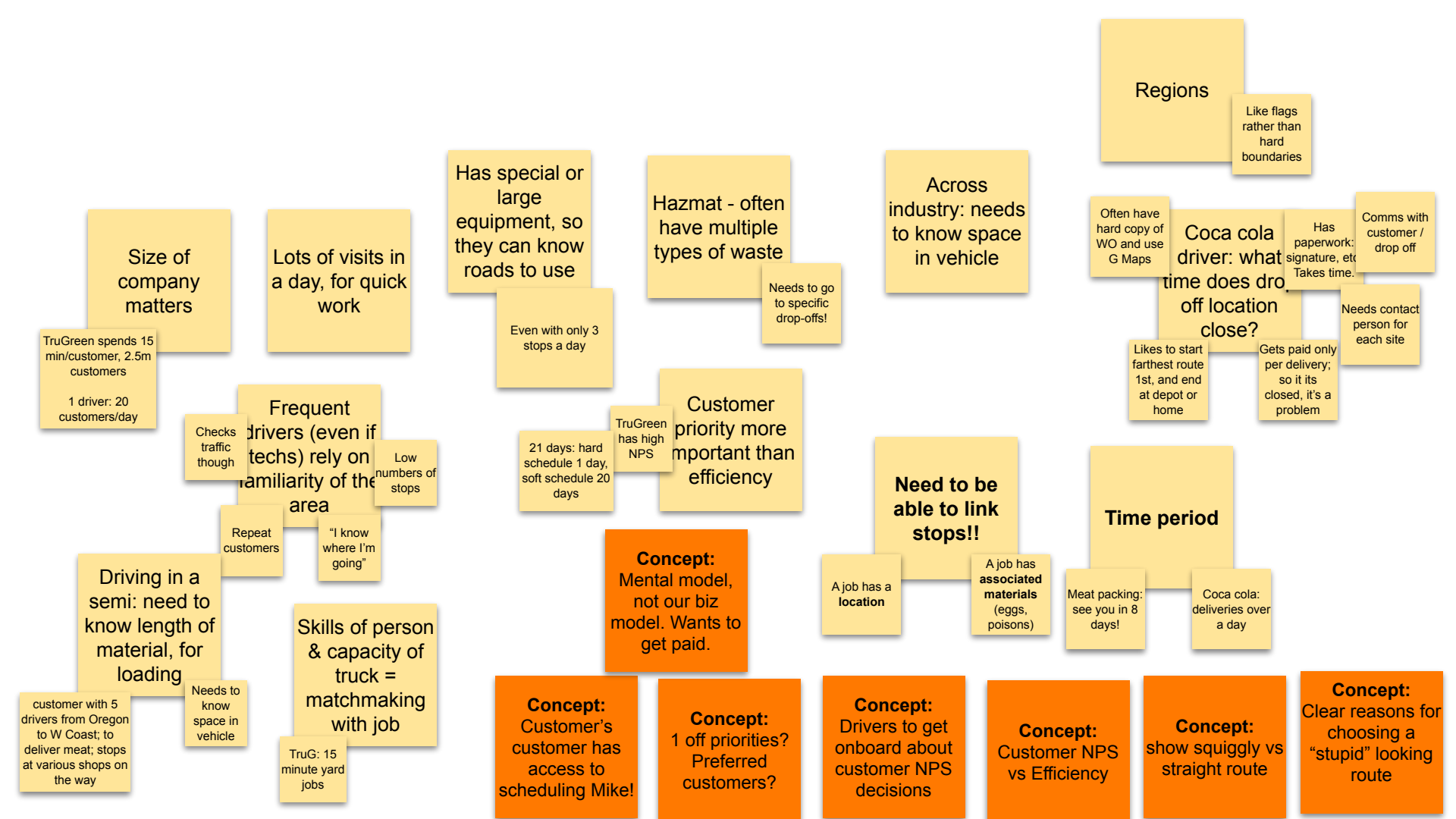
lotsa deliverables


Regions
Like flags rather than hard boundaries
Has special or large equipment, so they can know roads to use
Even with only 3 stops a day
Hazmat - often have multiple types of waste
Needs to go to specific drop-offs!
Across industry: needs to know space in vehicle
Often have hard copy of WO and use G Maps
Coca cola driver: what time does dro off location close?
Has paperwork: signature, etc Takes time.
Comms with customer / drop off
Needs contact person for each site
Likes to start farthest route 1st, and end at depot or home
Gets paid only per delivery; so it its closed, it's a problem
Size of company matters
TruGreen spends 15 min/customer, 2.5m customers
1 driver: 20 customers/day
Lots of visits in a day, for quick work
Frequent drivers (even if techs) rely on familiarity of the area
Checks traffic though
Low numbers of stops
Repeat customers
"I know where I'm going"
21 days: hard schedule 1 day, soft schedule 20 days
TruGreen has high NPS
Customer priority more important than efficiency
Need to be able to link stops!!
A job has a location
A job has associated materials (eggs, poisons)
Time period
Meat packing: see you in 8 days!
Coca cola: deliveries over a day
Driving in a semi: need to know length of material, for loading
customer with 5 drivers from Oregon to W Coast; to deliver meat; stops at various shops on the way
Needs to know space in vehicle
Skills of person & capacity of truck = matchmaking with job
TruG: 15 minute yard jobs
Concept: Mental model, not our biz model. Wants to get paid.
Concept: Customer's customer has access to scheduling Mike!
Concept: 1 off priorities? Preferred customers?
Concept: Drivers to get onboard about customer NPS decisions
Concept: Customer NPS vs Efficiency
Concept: show squiggly vs straight route
Concept: Clear reasons for choosing a "stupid" looking route

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#thecraft

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