BUAD 317 · SLIDE NOTES

Casual Learning Conversations

Each slide is on the left. Type or write your notes on the right. https://julesmorrisphd.com/teaching/smith-gls/buad-317/casual-learning-conversations/



Slide 1

My notes



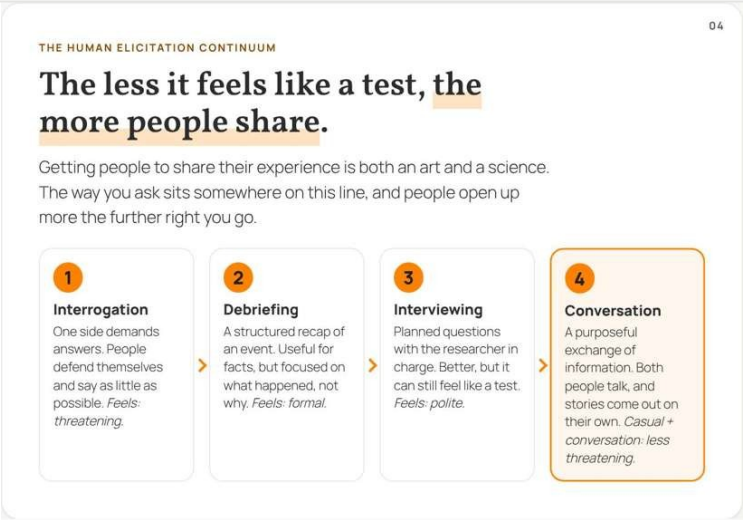
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My notes



Slide 3

My notes



Slide 4

My notes



Slide 5

My notes



Slide 6

My notes

07

QUESTIONS UNLOCK THE STORY

Ask for a story, not a verdict.

Open with **TEDW** to reach the why.

T · TELL ME
"Tell me about..."
Or: "Talk me through the last time you..."

E · EXPLAIN
"Explain..."
Asks for their reasoning.

D · DESCRIBE
"Describe..."
"...what happened."
Gets concrete detail.

W · WALK ME THROUGH
"Walk me through..."
"...how you..." Shows their steps.

⊕ More: what interviews give you

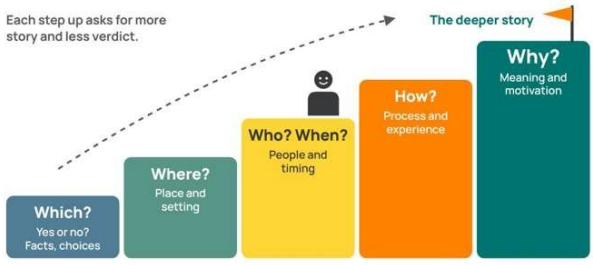
Slide 7

My notes

08

THE QUESTION STAIRCASE

Climb toward why.



Our own drawing, based on the casual learning conversations slides.

⊕ Text version of this diagram

Slide 8

My notes

09

FIVE TYPES OF QUESTIONS

A strong conversation guide uses all five.

Screening comes first. Discovery and behavior questions do most of the work in generative research. Solution and opinion questions round it out.

1	2	3	4	5
Screening	**Solution**	**Discovery**	**Behavior**	**Opinion and preference**
Demographics, role-based and user-based.	Experiences with a product, service, space or process.	Background, context, pain points and gains.	Past experiences, workflow, decisions and tasks.	Satisfaction, reactions, intentions, comparisons.

⊕ What each type does, with an example

Slide 9

My notes

10

PUT THEM IN ORDER

Stories first, judgments last.

1 **Screen**
Make sure you have the right person.

2 **Discovery and behavior**
The why, and what people actually do.

3 **Solution**
What they use today.

4 **Opinion**
Reactions and comparisons.

Screen, then discovery and behavior, then solution, then opinion.
Save opinions about a new idea for prototype feedback in Part D.

Slide 10

My notes

11

CONVERSATION TIPS

Six ways to keep people talking.

Ask open questions
Skip yes or no.

Use the 5 whys
"What does 'fine' mean to you?"

Use analogies
"Mercedes or VW, and why?"

Ask them to show you
"Can you show me how?"

Seek the stories
"Tell me about a time..."

Mind the gap
Say and do differ? Ask.

⊕ More: each tip, and probes for the 5 whys

Slide 11

My notes

12

THE QUESTION BANK

Swap the brackets.

Put in your challenge, then make it sound like you.



Photo: Thought Catalog on Unsplash

69 STARTER QUESTIONS

- ☑ Screening · 8
- ☑ Solution · 7
- ☑ Discovery · 12
- ☑ Behavior · 20
- ☑ Opinion and preference · 22

⊕ Open the bank: all 69 questions

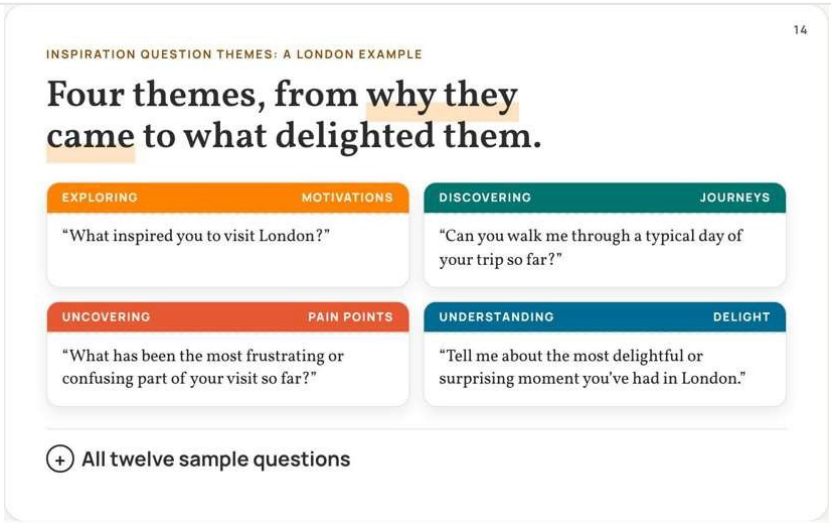
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My notes



Slide 13

My notes



Slide 14

My notes



Slide 15

My notes

02

THE PURSUIT OF A STORY: WHAT YOU ARE HUNTING FOR

Seven things to hunt for.

Dreams
Pictures of an ideal future. What would "great" look like?

Insights
The "a-ha" that changes how you see the problem.

Needs and wants
What they desire, even latent needs not yet put into words. This is need-finding.

Gaps
Shortcomings and design flaws in what exists today.

Thorny problems
Wicked, tangled problems with many causes and no single right answer.

Pain points
Fears, frustrations, anxieties and disappointments: the bug list.

Contradictions
They say one thing and do another. Follow these.

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My notes

WHAT TO LOOK AND LISTEN FOR

Notice a cue? Slow down.

Keep this list in your pocket. When you notice one, ask a follow-up.

Feelings and puzzles
Surprises, frustrations, confusions, contradictions, things missing.

Stories and patterns
A specific time, examples, work-arounds, metaphors, quotes.

⊕ All 18 cues



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My notes

04

OBSERVING PEOPLE: SIX TIPS

Six habits of a sharp observer.

Cast aside your biases
Focus on their lives. Let them tell their own stories.

Note contradictions
Innovation lives between what people say and do.

Listen to personal stories
One of the most revealing gifts.

Watch for workarounds
Clumsy or clever, they point at unmet needs.

Needs are not solutions
Needs open possibilities. Solutions close them.

Look beyond the obvious
Insights come from the details.

⊕ More: going deeper on each tip

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My notes

05

EMPATHY: LISTEN WITH YOUR EYES

Feelings show without words.



Our own drawing, based on physician Helen Riess's EMPATHY acronym (Riess and Kraft-Todd, 2014). Descriptions are our own.

⊕ Text version of this diagram

Slide 19

My notes

06

THE EMPATHY MAP, WITH GOALS

Sort notes into five areas.

Goals, the fifth, points the map at what this person is trying to do.

Says
○ Their exact words, in quotes. One quote per sticky note.

Thinks
○ Beliefs and worries. You infer it, so mark it as your read.

Does
○ Steps, habits and work-arounds you saw or heard.

Feels
○ Emotions, backed by their words and EMPATHY cues.

Goals
○ What they want to get done or feel. Start with a verb.

⊕ Refresh the four-area map

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My notes

07

THE EMPATHY MAP, DRAWN

One person, seven areas, every prompt.



Our own drawing, based on the empathy map worksheet in the casual learning conversations slides.

⊕ Text version of this diagram

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My notes

08

GOALS: THE FIFTH AREA

Start each goal with a verb, not a noun.

What they are trying to get done or to feel. Start each goal with a verb ("Leave knowing nothing was missed"), not a noun ("better handoff"). Verbs keep you focused on the person, and they set up need statements later.

My notes

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09

WORDS FOR FEELS: PLUTCHIK'S WHEEL

Name the feeling precisely.

"Upset" is too vague. Name the feeling, then its strength.



MILDER	PRIMARY	STRONGER
Serenity	Joy	Ecstasy
Acceptance	Trust	Admiration
Apprehension	Fear	Terror
Distraction	Surprise	Amazement
Pensiveness	Sadness	Grief
Boredom	Disgust	Loathing
Annoyance	Anger	Rage
Interest	Anticipation	Vigilance

Our own drawing, based on Robert Plutchik's wheel of emotions (1980).

⊕ Text version of this diagram

My notes

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10

ACV LADDERING: FROM FEATURES TO VALUES

Climb from the feature to the value behind it.

People usually start with a feature. Ask what it does for them, then why that matters.

A **Attributes: what?**
Characteristics a person assigns to a product, service or experience.

C **Consequences: how?**
The benefits they get from those attributes: functional, social and emotional.

V **Values: why?**
The motive or belief behind it, often unconscious (latent), that drives behavior.

⊕ Means-end chain theory in three rungs: an example

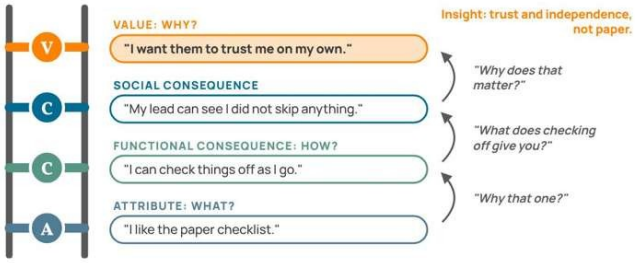
My notes

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11

MEANS-END CHAIN

Ask "why?" until you reach the value.



Our own drawing, based on means-end chain theory (attribute, consequence, value). The example is made up.

⊕ Text version of this diagram

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My notes

12

THE SHAPE OF A CONVERSATION

A good conversation has an arc.

From the d.school's *Empathy Field Guide* (2013), in our words.



⊕ More from the field guide

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My notes

13

THE CONVERSATION ARC

Build up to emotion. Land it gently.



Our own drawing, based on the conversation arc in the casual learning conversations slides.

⊕ Text version of this diagram

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My notes

14

WHILE ENGAGING IN HCD: SEVEN PRINCIPLES

Carry these into the field.

1. **Listen deeply.** To wants, needs and workarounds.
2. **Find root causes.** What shapes attitudes, behaviors, beliefs.
3. **Check yourself.** Notice your own biases and judgments.
4. **Fail early, fast and small.** Iteration is learning.
5. **Learn first.** Don't jump to solutions.
6. **Be inclusive.** Always hear multiple perspectives.
7. **Stay flexible.** Kinks can lead to key insights.

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My notes

15

BUILD A CROSS-DISCIPLINARY INTERVIEW TEAM

You will not reach unexpected solutions with an expected team.

Diversity rules in a good design team.

⊕ Use your team's range in the field

Slide 29

My notes

ROTATE THREE ROLES

Lead, document, take notes. Swap every time.

Rotate these roles with each new interview so everyone tries them all.

- **L** **Lead the interview** Ask the questions and keep the conversation flowing.
- **D** **Document** Take the photos, with permission: context, portrait and artifact.
- **N** **Take notes** Exact words in quotes. What you see in a separate column.

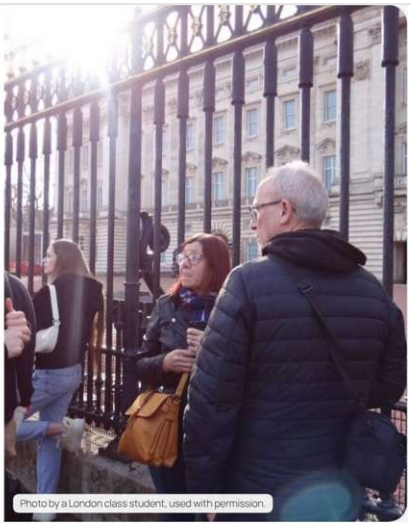


Photo by a London class student, used with permission.

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My notes