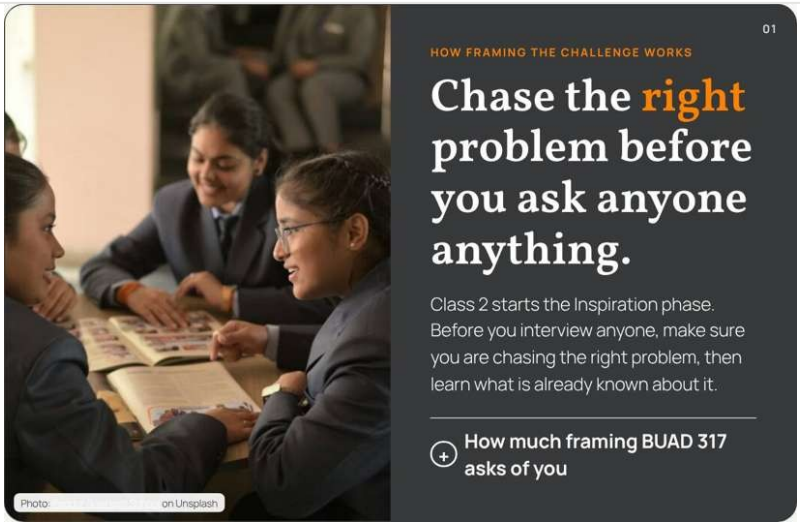
BUAD 317 · SLIDE NOTES

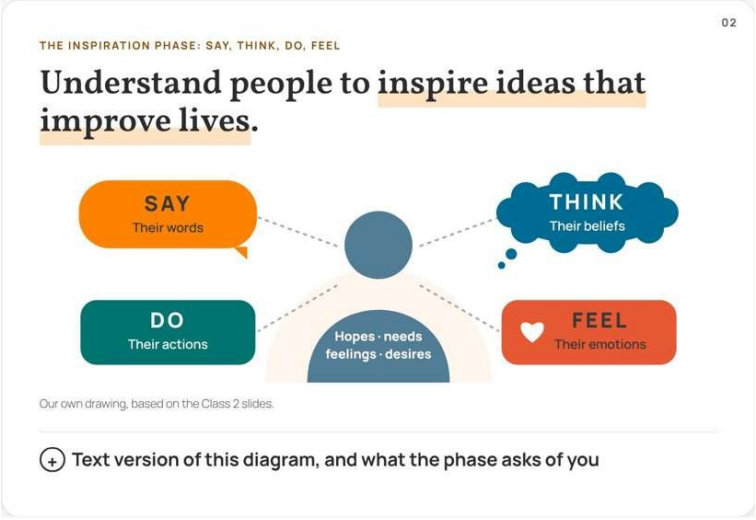
Framing the Challenge and Secondary Research with AI

Each slide is on the left. Type or write your notes on the right. https://julesmorrisphd.com/teaching/smith-gls/buad-317/focus-area-literature-review/



Slide 1

My notes



Slide 2

My notes

03

REFRESH FROM IB 407 FIRST

London covered the basics. Start there.

This page does not repeat what you learned in London. Review these three, then use the BUAD 317 additions below.

Review 1
Four Types of Problems and the three framing tests

Review 2
The How Might We formula and steps

Review 3
The empathy continuum

My notes

Slide 3



04

FRAME YOUR DESIGN CHALLENGE: THREE CHECKS

Framing is more art than science.

1. **Impact**
   Does it drive toward ultimate impact?
2. **Variety**
   Does it allow for a variety of solutions?
3. **Context**
   Does it take context into account?

Then refine it.

Photo by @thisisengineering on Unsplash

My notes

Slide 4

05

FOUR TYPES OF PROBLEMS

Know what kind of problem you are facing.

Gravity	Anchor	Technical	Adaptive
Impossible to overcome. Work around it.	Stuck on one solution. The fix became the problem.	An expert can solve it. The answer is known.	Thorny, wicked. People must change beliefs or behavior.

Accept it → Only the people involved can solve it

Our own drawing, based on the course slides and Ronald Heifetz's technical vs. adaptive distinction.

⊕ Text version of this diagram, and technical vs. adaptive challenges

My notes

Slide 5

06

HCD BEGINS WITH GETTING TO THE RIGHT PROBLEM

Spend as much on the problem as on the solution.



Our own drawing, based on the Class 2 slides.

⊕ Text version, and the four types in the original slides

Slide 6

My notes

07

THE CONTINUUM OF EMPATHY

Empathy sits between feeling for and acting with.



Our own drawing, based on the Class 2 slides.

⊕ Text version of this diagram

Slide 7

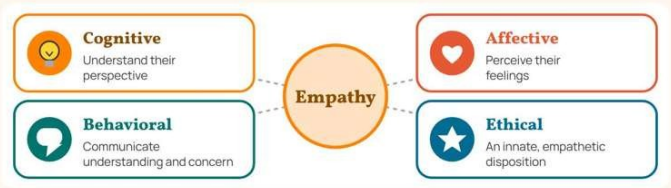
My notes

08

MULTI-DIMENSIONAL EMPATHY

Empathy has four parts.

"Empathy allows us to project ourselves into the shoes of another and understand and experience the world from their perspective, without losing ourselves (agency) or our pathway to our goals."



Our own drawing, based on the Class 2 slides.

⊕ Text version of this diagram

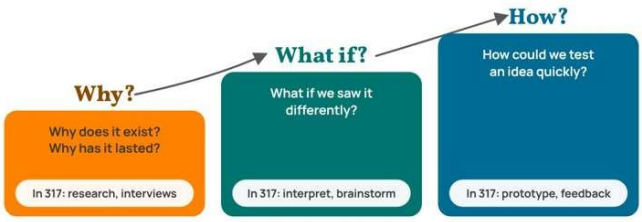
Slide 8

My notes

09

ASK BETTER QUESTIONS: BERGER'S SEQUENCE

Why? What if? How? Each one opens the next.



Our own drawing, based on Warren Berger, *A More Beautiful Question*: curiosity is a skill you can practice.

⊕ Text version of this diagram

Slide 9

My notes

10

BERGER: TWO FORMS OF QUESTIONS

Questions shape your life and your relationships.



Our own drawing, based on Warren Berger, *A More Beautiful Question*.

Solving follows the same order: Understanding: Why? | Imagining: What if? | Doing: How?

⊕ Text version of this diagram

Slide 10

My notes

11

DECEPTION, DETOURS AND DEAD ENDS

Three traps that waste a team's semester.

A good problem, not the right one

Some problems are interesting and important, but they are not the problem that matters most to the people you serve.

Watch out: a problem your team likes because it points to an idea you already love.

Symptoms, not causes

Chasing symptoms leads to more problems. Generative research digs for the etiology: the root cause behind what you see.

Watch out: "few people use the service" is a symptom. Ask why, several times.

The actionable test

Start with challenges someone can act on. If nobody on your team or the client side can change anything about it, it is not a problem you can solve.

Watch out: "the economy" or "human nature" as the cause. Those are gravity problems.

⊕ Where these traps come from

Slide 11

My notes

FROM PROBLEM STATEMENT TO HMW

One problem, several HMW questions.

Problem: students need to save as much as they can on textbooks, a big yearly cost on little spare income.

1. **HMW** help students connect with each other to buy and sell textbooks at lower prices?
2. **HMW** work with local bookstores so students can buy and sell low-cost textbooks on and off campus?

⊕ Which one to pick



Slide 12

My notes

THE HOW MIGHT WE FORMULA

13

Four parts make a workable question.

How might we (the opener) + Action (a verb) + For (the person) + So that (the outcome)

EXAMPLE

How might we connect Haslam students with Knoxville businesses so that both sides walk away with something they value?

Our own drawing, based on the course HMW slides.

⊕ Text version of this diagram

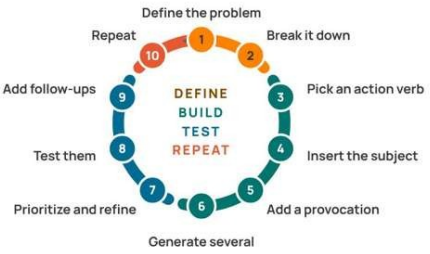
Slide 13

My notes

TEN STEPS TO STRONG HMW QUESTIONS

14

Define, build, test, repeat.

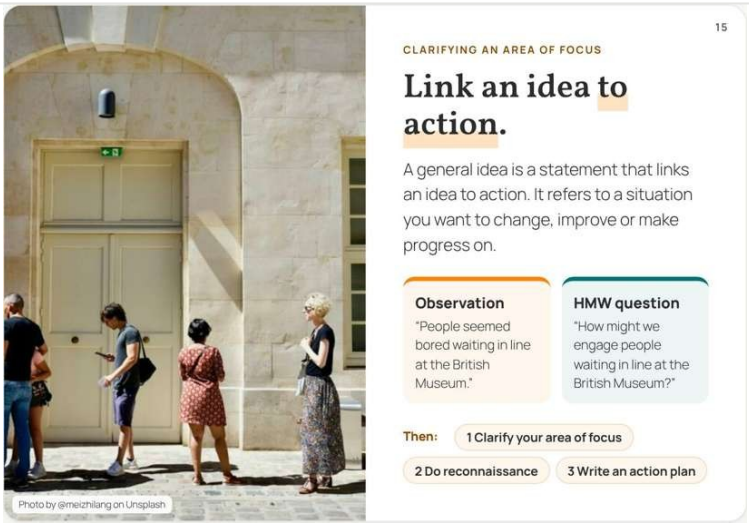


Our own drawing, based on the course HMW slides.

⊕ Text version: the ten steps

Slide 14

My notes



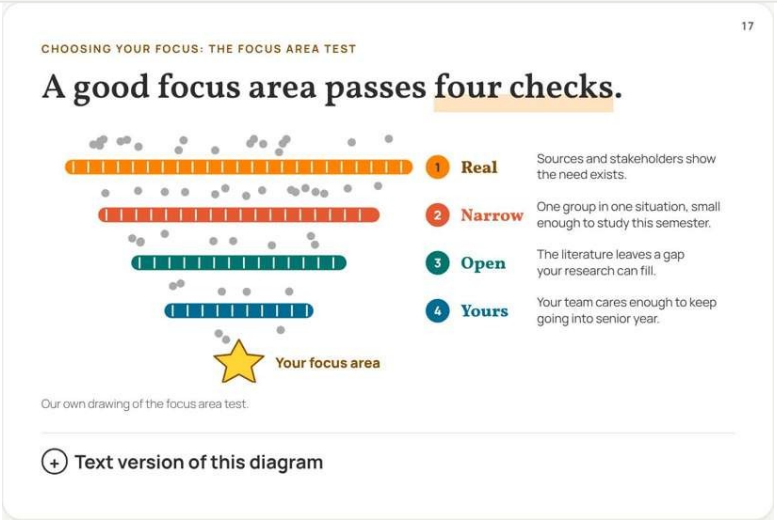
Slide 15

My notes



Slide 16

My notes



Slide 17

My notes

18

CHOOSING YOUR FOCUS

Name the people, the situation and the moment.

Too broad

"Improve healthcare in East Tennessee." No one could research that in a semester, and every source is somewhat relevant.

VS

Focused

"How family caregivers manage new medications in the first 48 hours after a parent leaves the hospital." Clear people, situation and moment.

Slide 18

My notes



01

HOW SECONDARY RESEARCH WITH AI WORKS

AI speeds up the search. Your team stays in charge.

Secondary research, also called a review of the related literature, tells you what is already known about your challenge. AI can speed it up, but only if your team stays in charge of the questions, the sources and the judgment.

Photo on Unsplash

Slide 19

My notes



Photo by @zoshuacolah on Unsplash

02

SECONDARY RESEARCH IN FOUR MOVES

Learn the context before the conversations.

1. **Context.** Recent news, journals and the web.
2. **Innovations.** The edge of what is possible.
3. **Other solutions.** What worked, what didn't, what inspires you.
4. **Facts and figures.** Numbers that frame your challenge.

⊕ In full, and the source

Slide 20

My notes

03

READ FIRST, OR GO IN FRESH?

Read early to aim. Then let the interviews surprise you.

One side of the debate

Some researchers argue that reading the literature first narrows your view. You start seeing what others saw, and you lose the fresh, bottom-up look that generative research is for.

VS

The other side, and our approach

Others say an early review shows the assumptions underneath a problem and convinces clients you know the topic. In BUAD 317 you do both: read early to aim your interviews, then let the interviews surprise you.

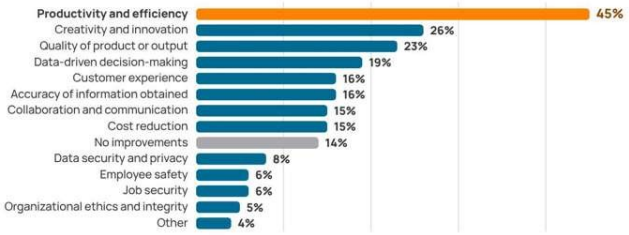
Slide 21

My notes

04

HOW EMPLOYEES SAY AI HAS IMPROVED THEIR JOB

AI made almost half more productive.



Our own chart, based on Gallup's Workforce panel, Q2 2024 (U.S. employees, margin of error ±3 points), as shown in the Class 2 slides.

⊕ Text version of this chart, and the exact question

Slide 22

My notes

05

THE COURSE FRAMEWORK: AI AS A PARTNER IN CURIOSITY

AI is a partner in curiosity, not a shortcut.



Our own drawing of the course framework in your syllabus.

⊕ Five steps, each with the kind of output it produces

Slide 23

My notes



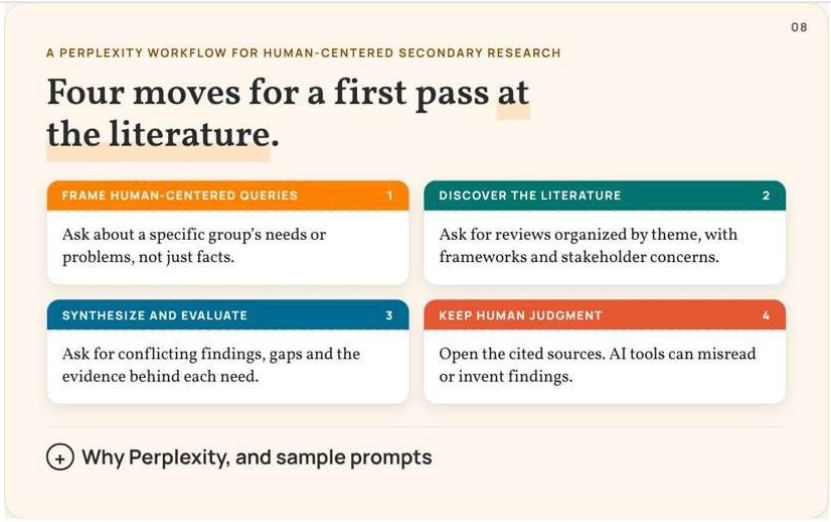
Slide 24

My notes



Slide 25

My notes



Slide 26

My notes

09

KEEP IT TIED TO REAL PEOPLE

Ask for evidence instead of opinions.

Tie it to people. Keep findings tied to real people's needs and behaviors.

Pair stories with numbers. Combine stories and quotes with the figures.

Check the high stakes. When the topic is sensitive, back up AI results with your own database searches or the original reports.

My notes

Slide 27

10

JUDGE EVERY SOURCE WITH SIX QUESTIONS

Six questions before you trust a source.



Our own drawing, based on the Class 2 slides.

⊕ Text version: the six questions in full

My notes

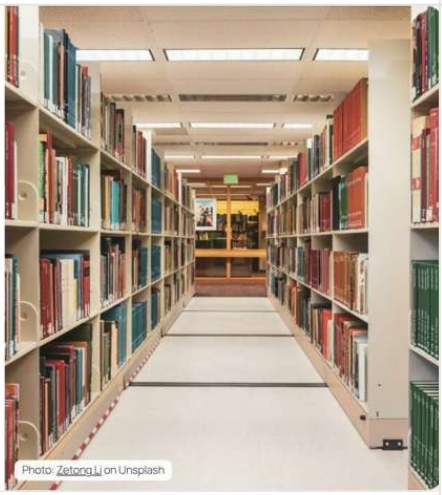
Slide 28

THE NINE-STEP LITERATURE REVIEW

Get to know the business librarian.

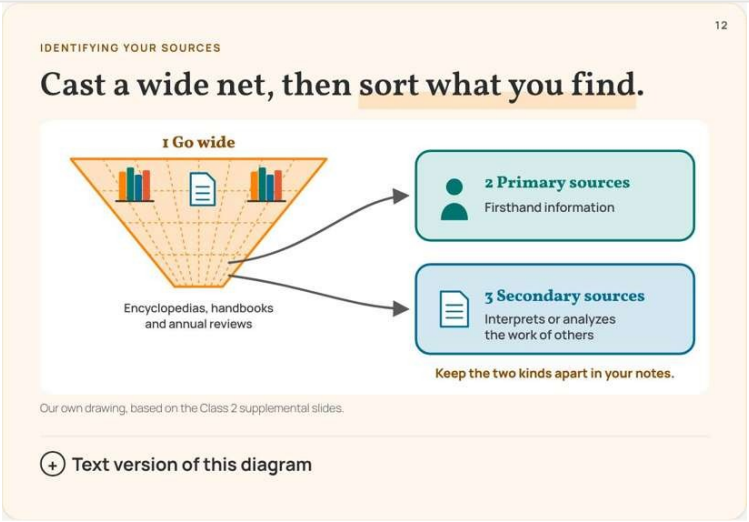
Keywords, databases, the library and the business librarian. If it takes you more than 15 or 20 minutes to find something, call in the pros.

⊕ The nine-step literature review: keywords, databases, the library and the business librarian



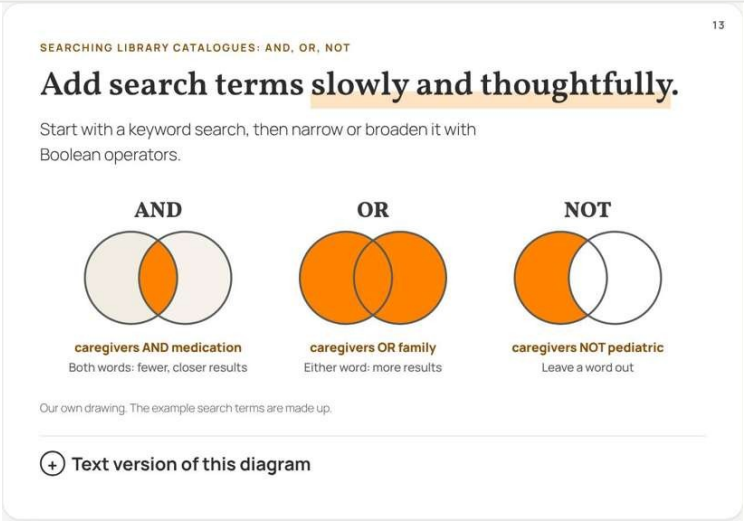
My notes

Slide 29



Slide 30

My notes



Slide 31

My notes



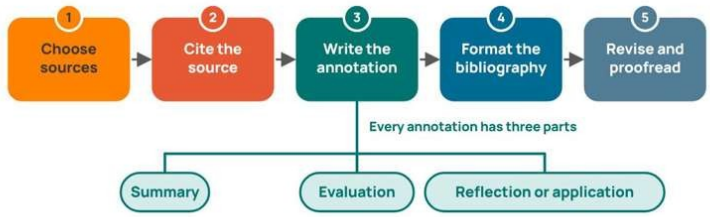
Slide 32

My notes

15

THE ANNOTATED BIBLIOGRAPHY, STEP BY STEP

Summarize, evaluate, reflect.



Our own drawing, based on the Class 2 supplemental slides.

⊕ Text version of this diagram

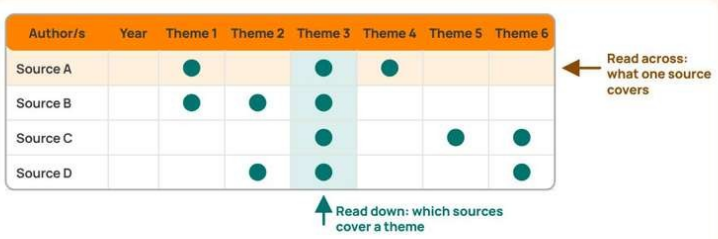
My notes

Slide 33

16

THE ANNOTATED LITERATURE MATRIX, DRAWN

See your sources side by side.



Our own drawing of the template in the Class 2 supplemental slides: a visual overview of similarities and differences.

⊕ Text version of this diagram, plus a triangulation matrix template

My notes

Slide 34

17

EXISTING RECORDS, TRIANGULATION AND THE LITERATURE MATRIX

Make your evidence trustworthy.

Existing records

Your client's own reports and data are often the richest source you will find.

Triangulation

A finding is stronger when three different kinds of evidence point the same way.

Bibliography and matrix

A bibliography is organized by source. A literature matrix is organized by theme. Do both.

⊕ Existing records, triangulation and the literature matrix: make your evidence trustworthy

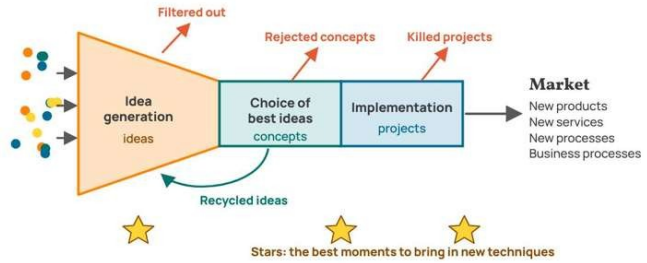
My notes

Slide 35

TYPICAL PHASES OF INNOVATION

18

Many ideas in. A few reach the market.



Our own drawing, based on the Class 2 supplemental slides.

⊕ Text version of this diagram

Slide 36

My notes

DIGITAL RESEARCH TOOLS, THEN AND NOW

Keep the team's research in one place.

The original slides list wikis, blogs and Skype. Today's tools do the same three jobs.

Wiki → shared docs
One living record of sources, notes and decisions the whole team can edit.

Blog → research journal
Dated reflections after each interview, so you can see your thinking change.

Skype → Zoom or Teams
Remote interviews and team check-ins. Record only with permission.



Slide 37

My notes

VALIDITY, RELIABILITY, GENERALIZABILITY AND ETHICS

20

Four ways to judge the quality of field data.

V — Validity
Are you capturing what you think you are?

R — Reliability
Would the same techniques give consistent data?

G — Generalizability
Inside the community you studied, and beyond it.

E — Ethics
Informed consent, freedom from harm, the IRB.

⊕ Validity, reliability, generalizability and ethics: the supplemental slides, and where to learn them

Slide 38

My notes