Rios PARTNERS

HCD for CX

A Rios Partners Field Guide
for using human-centered design
to improve customer experience

Discover Phase

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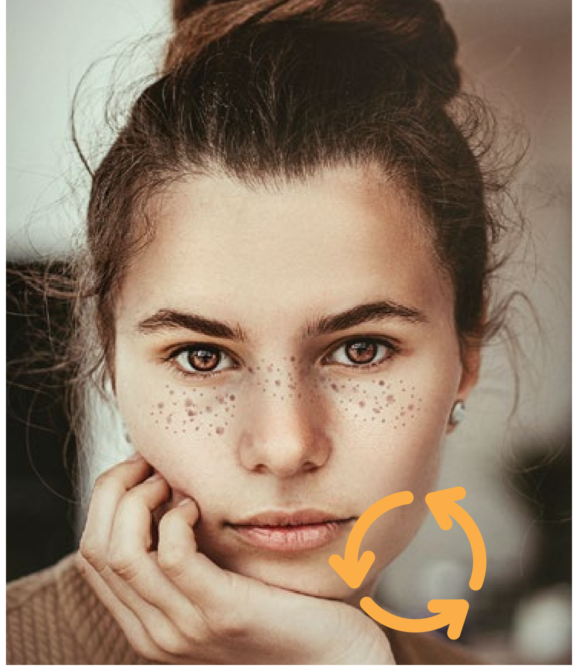
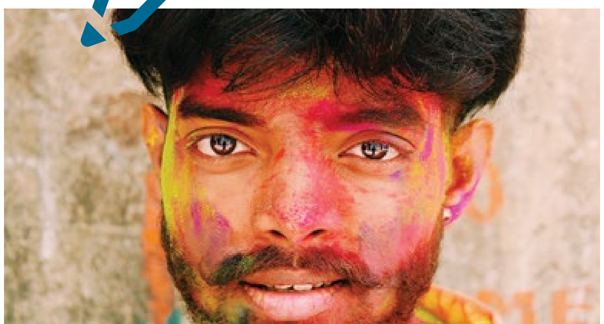
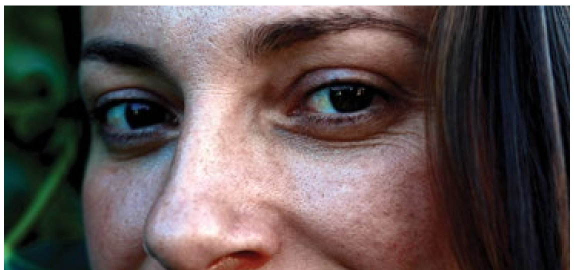
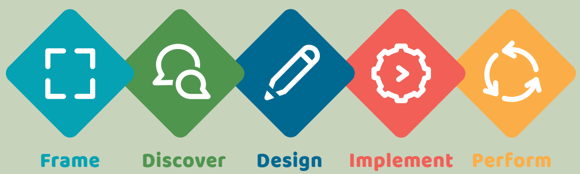





Discover Phase

The five phases of the
Rios Partners HCD process



Objectives

In the Discover phase, you will build empathy with customers and employees, focusing on understanding their experience as it is today and the problems they face. Set aside generating potential solutions until the Design phase.

This field guide focuses on interviewing as the primary method to build empathy but see page 6 (**Beyond Interviews**) for a discussion of other methods that can help, as well.

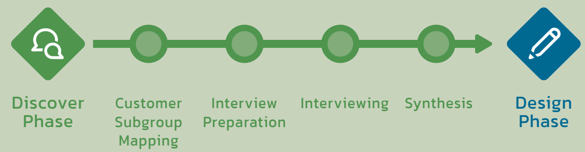
Approach

As you proceed through the Discover phase, be sure to apply each element of the HCD approach:

- **Empathy:** Bring genuine curiosity to your conversations with customers. Your goal is to understand not just what they do or think along their journey with your organization but what they feel, and why. As you learn, replace your assumptions about the customer experience with direct evidence from your research.
- **Iteration:** Use the data you gather in this and future phases to revisit and revise your problem framing. Each day you should be able to answer the questions of "who is the customer" and "what do they need" anew.
- **Flexibility:** Include a diverse set of voices in synthesis to broaden the team's perspective. Don't be afraid to change your point of view as new information comes in, even if it complicates the story you are trying to tell.

Process

The Discover phase includes the following core steps:



Phase-gate

You are done with the Discover phase when you can answer the following questions:

1. **What does (do) the customer(s) need (need statements)?**
2. **What is it like to be the customer (e.g., what's their journey, bright spots, pain points)?**
3. **What are the key insights you have developed from the research?**
4. **How does the employee's experience affect the customer's experience?**
5. **What outcome(s) should our solutions all be driving towards?**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Customer Subgroup Mapping

What

To determine the right mix of customers to talk to, start by brainstorming all the different ways you could break your customer group into sub-types. Then narrow down to the types you want to prioritize, making sure to include both extreme and mainstream users.

Why

No customer group is monolithic, and different types of customers will have different experiences and perspectives on the problem. Given limited time and resources, identifying the right mix of customer types to include in your research plan will give you insights that are both deep and broad.

Resources for this Step

| p. 17 **Customer Identification Framework**

How

Use the **Customer Identification Framework** tool (page 17) to break down your customer group into subgroups.

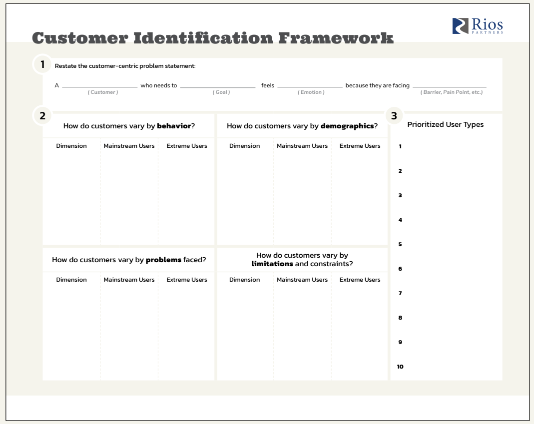
1 Start by restating the customer-centric problem you identified in the Frame phase. This reminds you who your customer is at a high level and what you think the overall problem is from the customer's perspective.

2 Use the four categories (behavior, demographics, problems faced, and limitations/ constraints) as a starting point to brainstorm as many customer types as you can think of. A whiteboard (real world or virtual) is a great tool to work through this as a group. Use the three boxes within each category to think through how users vary. First generate "dimensions" along which customers could vary (e.g., age, location, frequency of use, mobility). Then, identify possible "mainstream" (typical customer) and "extreme" (e.g., 75+, super-users, home-bound) customers for each of those dimensions.

3 After brainstorming a wide range of customer subgroups, prioritize those you want to target in your research. Return to your overall problem statement to consider what mix of customer types will best help you understand the problem. Be sure to include some extreme users to uncover relevant needs that may not be top of mind for mainstream users.

4 Based on your priority customer types, develop a list of actual customers to interview (names, contact info). We generally recommend targeting 2-3 interviews per customer type, but there is no hard and fast rule about how many interviews you need. You should also interview frontline employees who interact with customers along the journey, as well as leaders and subject matter experts whose perspective you think will help you better understand the problem.

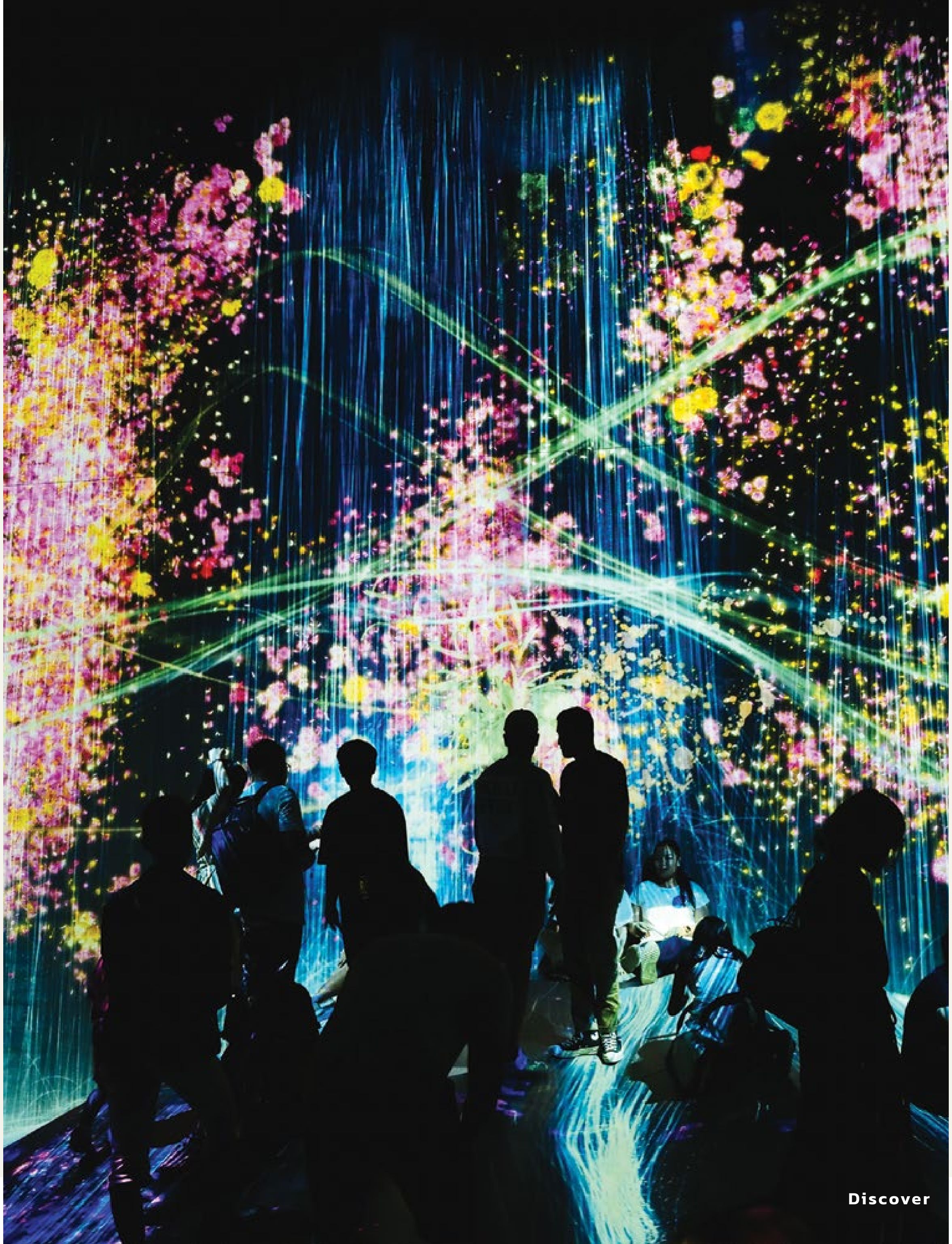
Once you have your interview list, you are ready to start reaching out to recruit interview participants.



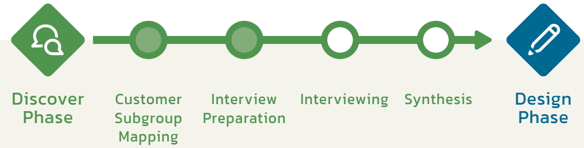
Beyond Interviews

This Field Guide focuses on interviewing as a proven method for generating depth of insight across a range of customer perspectives, but there are many field research methods you can use to build empathy. Some examples are:

- **Customer surveys:**
  Gather quantitative data on how key themes you identified in interviews are playing out across a much wider audience
- **Observational research:**
  Follow a product on its journey or listen in on employee-customer interactions to gain a valuable firsthand perspective on the problem
- **Focus groups:**
  Facilitate a discussion with a group of customers or employees
- **Customer intercepts:**
  Going to the environment you are trying to understand and engage customers in ad hoc brief conversations ("intercepting them")
- **Customer journaling:**
  Asking a customer to keep a log of actions, thoughts, and feelings
- **Participatory research:**
  Going through a process you are trying to understand as if you were a customer



Interview Preparation



What

Once you've identified who you want to interview, determine what your goals are for those interviews. Structure questions and interview activities based on those goals and your knowledge of the customer.

Why

Structuring interviews based on goals and knowledge of the customer ensures you maximize the time you have with someone to understand their customer experience. HCD interviewing is designed to let the customer "take you where they want to go," so having a plan to ensure you get your critical questions answered is key.

How

Use the **Setting Interview Objectives** template to set goals ahead of an interview by following these steps:

1. Start by restating the problem from the customer's or employee's perspective based on the hypotheses you came up with in the Frame phase.
2. Next hypothesize the story you need to understand in order to solve the problem. This should be a journey that has a front-stage (what the customer experiences) and a backstage (what frontline employees are doing along the customer's journey). Identify what you think the key stages of the journey are as well as the key touchpoints between customers and employees.
3. Hypothesize what customers are experiencing along the journey. Document your current assumptions about what they are thinking, feeling, and doing at each stage of the journey.
4. Set your objectives based on the hypotheses or assumptions you want to confirm or deny and the questions you want to answer. Start with a long list of potential objectives and narrow it down to your top priorities.
5. Update this template as your understanding of the problem, journey, and customer/employee experience changes based on what you have learned.

Next, create an interview guide that you can update ahead of each interview. The guide should be constructed around a list of objectives to guide questions rather than a prescriptive list of questions. Also consider including one or more activity as part of your interview. See the next section, **Interviewing for Empathy** (page 9), for best practices on interview questions and ideas for activities to use with customers and employees during interviews.

Finally, prepare a consent form if needed for each participant to sign or agree to verbally at the start of the interview.

Checklist for interview preparation

- [ ] Participant list
- [ ] Interview Objectives tool
- [ ] Interview guide
- [ ] Someone to take notes and/or a recording device

Additional materials if relevant

- [ ] Interview consent form
- [ ] Interview activities
- [ ] Virtual meeting link

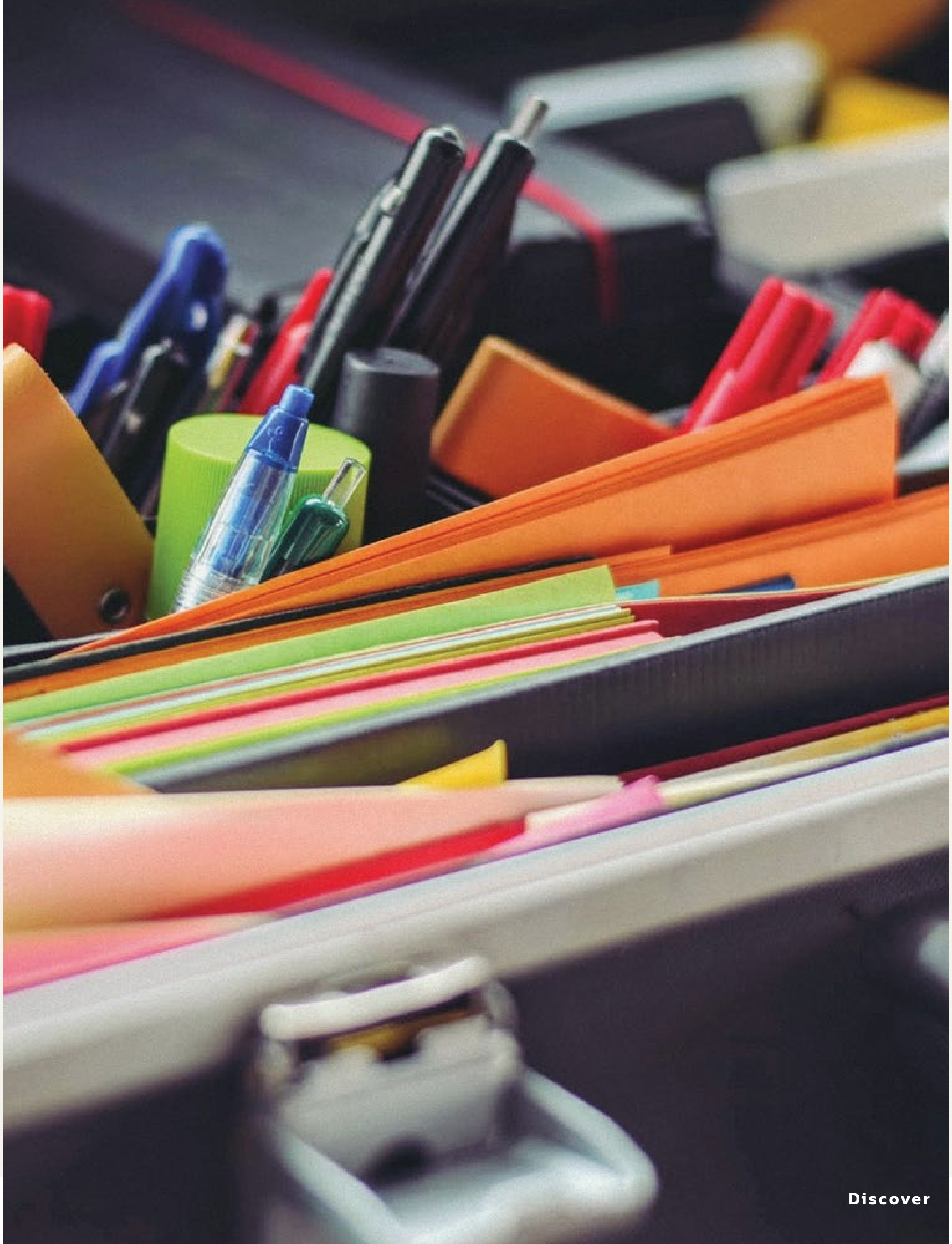
Resources for this Step

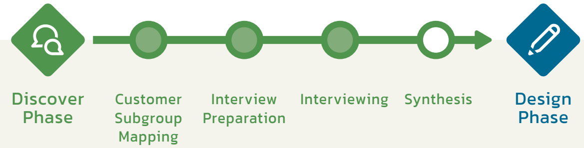
| p. 19 **Setting Interview Objectives**

Here are some guiding principles to keep in mind as you prepare to build empathy with customers and employees.

- **Interviewing customers:**
  Coming out of a customer interview, you should be able to clearly state what that person needs at each step of their journey and, more importantly, why they need it. A deep understanding of customer needs is necessary to ensure you are designing for the root cause of what the customer needs, not a symptom. Keep this central goal in mind as you plan your interviews. See **Needs Statements** exercise, page 33.

- **Interviewing employees:**
  To build a great customer experience, you need a deep and nuanced understanding of employee experience. Everything you build for customers will be mediated through employees and the back-end systems and processes they maintain. As you build empathy with employees through interviews, listen for the unwritten rules that define an organization's work culture. Unwritten rules are the implicit behaviors or "way an organization does things" that are not explicitly called out in your standard operating procedures (SOPs), employee handbook, etc. For example, a common unwritten rule is "I've been working with my customers for 20 years, I know what they need." This unwritten rule often leads to assumptions in your day to day work that hinder your organization actually meeting customer needs. Furthermore, unwritten rules are often more powerful than formal policies in shaping the customer experience.





Interviewing for Empathy

What

Interviewing for empathy is a specific style of interviewing that uses an open-ended, conversational approach to elicit stories and encourage the interviewee to share their emotional experience.

Why

While traditional interviewing is more transactional (i.e., Interviewer just needs to get answers to specific questions) interviewing for empathy is more relational, letting the interviewee guide the conversation. By allowing the interviewee to also guide the conversation, this technique reveals to the designer who the interviewee is as a person, what matters most to them, their needs, and emotional experience. This knowledge allows the designer to better understand what it's like to be the interviewee (to empathize with them).

Resources for this Step

p. 13 **Synthesis Spotlight**
p. 21 **Interview Activity Guide**
p. 23 **Interview Debrief**
p. 25 **Point of View**
p. 27 **Memorable Story**

How

1 Conduct the interview
Assign two team members to each interview in the roles of interviewer and notetaker. The interviewer should be 100% focused on the conversation while the note-taker takes notes. Follow these best practices:

- Think of the interview as a conversation. Be deeply curious and position the interviewee as the expert on their own experience.
- Focus in on an interesting insight, quote, or story and then "dig a well" by asking "why" multiple times until you get to the root cause (See Five Whys sidebar).
- Let the interviewee guide the conversation to what is most important to them. Towards the end of the interview, use your interview guide to come back to important topics that have not been covered yet.
- Avoid interruptions and stop yourself from finishing someone's sentences if they pause. Let the interviewee fill the silence with what is on their mind.
- Ask for specific examples rather than generalities ("tell me about a time when…").
- Don't ask leading or biased questions.
- Avoid offering your own ideas for solutions.

You can also use activities during an interview to generate different perspectives. Select 1-2 activities ahead of an interview to keep in your back pocket. See the **Interview Activity Guide** (page 21) for some ideas for activities to use during interviews, such as card sorting and set-breaking.

2 Debrief the interview
Immediately after every interview, the interviewer and note-taker should take at least 15 minutes to debrief on what stood out from the conversation. You can use the **Interview Debrief**, **Memorable Story**, **Need Statement**, and **Point of View** templates to structure your discussion.

3 Capture the key takeaways
Ahead of group synthesis, either the interviewer or the note-taker should read back through the entire interview and create a condensed view of the conversation to share with the larger design team.

Additional Interview Tips

- Think of the interview as a conversation
- Ask open-ended questions
- Ask the interviewee for stories
- Stay 100% focused on the conversation and ask for stories
- Try to make the interviewee feel heard, comfortable, and safe, which will encourage candor
- Listen for where to dig deeper and ask follow-up questions
- Use the Five Whys exercise (see callout box)

The Five Whys

A core element of interviewing for empathy is getting to the root causes of the feelings, needs, and beliefs the interviewee is sharing with you. A simple, effective interview strategy to build empathy is asking “why” when you hear something that stands out as interesting and continuing to ask “why” to each response until you get to a deeper understanding of the issue. Don’t be afraid to keep asking “why” on a single topic five or more times to get to a deeper understanding why the person feels the way they do.

Interview Note Pad Template

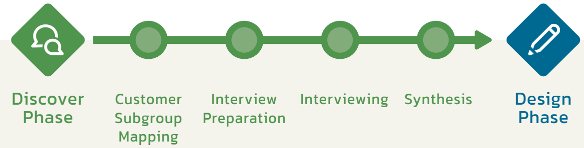
What you need:

- The worksheet
- A timer (use your phone)
- Something to take notes with

Name: **Date:** **Time:**

1 Key Quotes/Phrases	**2 Unspoken Gestures**
3 Needs	**4 Pain Points**
5 Bright Spots	

Synthesis



What

Synthesis is the process of making meaning out of data. The design team should meet at a regular cadence throughout the Discover phase to engage in collaborative synthesis of the information that's being gathered from interviews and other research methods. The synthesis step will produce a set of Discover artifacts that will help you communicate the customer's story and serve as a critical reference point during the Design phase.

Why

In order to make sense out of what you are learning, you need to put the data in a tangible format that everyone on the team can engage with. Dedicate a space (physical or virtual) for group synthesis so that the team aligns on what you've learned from customers and employees and, crucially, can work together to uncover "what it means" and "*why it matters*." By using whiteboarding and other visual methods, you provide opportunities to connect information in novel ways that can lead to the "aha moments" that drive truly innovative design.

How

The design team should meet regularly to share findings across interviews and begin to make connections across them. We recommend weekly, mid-phase, and end-of-discover-phase synthesis sessions for a multi-week Discover phase.

Here is a sample agenda for a one-hour weekly synthesis session that can be adapted to suit your needs.

1 **(10 min)** Review individual **Point of View** summaries for interviews that have been conducted since the last synthesis session. Each team member should write down data points (e.g., quotes, observations, challenges) that jump out to them on sticky notes and place them on a shared space (i.e., whiteboard, wall, virtual whiteboard) as you go.

2 **(5 min)** Take a few minutes to discuss the POVs and ask and answer questions.

3 **(30 min)** Use the data points listed to brainstorm answers to the following questions:

- What are the common **themes** across interviews?
- What common **needs** are we seeing?
- How are customers grouping into "**personas**" based on shared needs and objectives? (see Personas on page 14 for more information)
- How do customer and employee **bright spots** and **pain points** map across the **customer journey**? (See **As-Is Journey Map** on page 29)
- What are the **Moments that Matter** most to the customer along the journey we are trying to understand? (See **As-Is Journey Map** on page 29)

Data Points

Caregivers often feel "unprepared" to navigate the scheduling process, leading to confusion and delays.

"I just feel like I'm letting my husband down."

– Caregiver

>

Need Statement

Caregiver needs to get to the appointment on time because she's failing if her husband doesn't get the care he needs.

45% of all "talk time" on the phone at call centers is attributed to 11% of callers.

Some caregivers spend 8 hours a week on the phone, still can't get needed appointments scheduled.

>

Theme

Caregivers dedicate massive amounts of personal time to relentlessly pursuing solutions to scheduling issues.

Insight

Inefficient scheduling processes lead to delayed care and a feeling among caregivers that it is their "fault"

4 **(10 min)** Revisit **Framing the Problem** and update your understanding of the problem from the customer and employee perspectives. How does this change your own perspective on what the problem is?

5 **(5 min)** Update the **Interview Objectives** template based on what you've learned about the problem, journey, and the customer and employee experience.

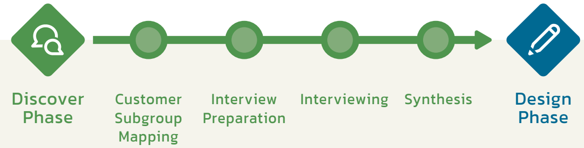
By your final synthesis session, you should have identified a few key **insights** to take with you into the Design phase. Insights represent the "so what" of the data. We define an "insight" to be a fresh, actionable perspective on the problem. One way to come up with an insight is to use a mad lib like this: "*Theme* X *came up because* Y *and suggests* Z *opportunity*."

Think of your final list of insights as the three or four key takeaways from the Discover phase you would share with your organization.

A few guidelines for synthesis sessions:

- **No solutions allowed.**
  Focus on the interviewee and their stories and save solutions for the Design phase.
- **Avoid judgment.**
  Approach these sessions with an open-minded mentality by saying "yes, AND..." build off of your teammates' thoughts.
- **Elevate the voice of the interviewee.**
  Try to filter out your own perspective and focus on what was actually said in interviews. Go back to the transcript if you need to remind yourself.
- **Quote the customer directly whenever possible.**

Synthesis



Spotlight: Discover Artifacts

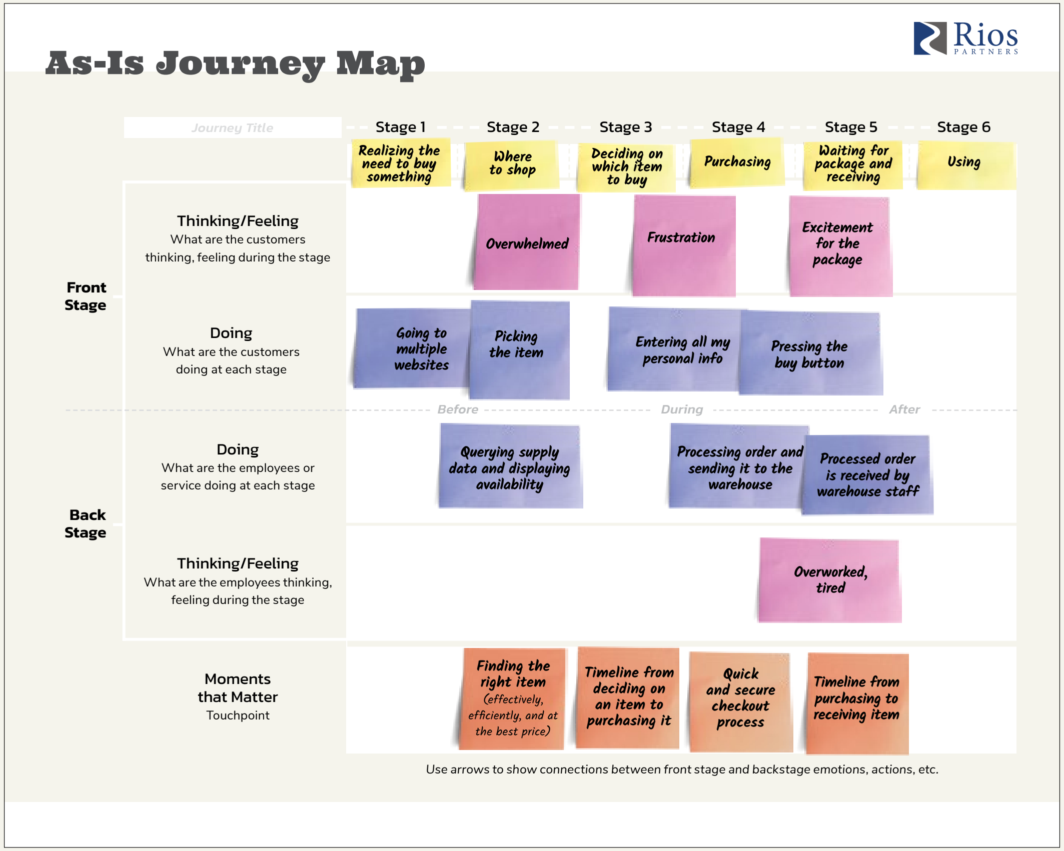
Discover artifacts are visual documents that provide your team with a useful way to align on your understanding of customer needs and communicate your findings with a broader group. These artifacts are different lenses through which you can view the customer experience. Below are a few examples.

Journey Map

A journey map is a visual representation of the customer's end-to-end experience. It documents customer bright spots, pain points, and needs along the journey, linking these isolated moments together into a larger story with a beginning, middle, and end. The journey map details the "front stage" – what the customer sees and interacts with – as well as the "back stage" – the employee operations and internal systems the customer doesn't see.

Use your synthesis sessions to start mapping the customer journey, focusing particularly on the moments that have the greatest impact on the customer's overall experience—what we call the "Moments that Matter". Your goal is to create a visual artifact that will align your team on a common understanding of the customer experience. Validate your draft journey map with customers and employees to make sure you have correctly represented their experiences, and update it regularly as you gain new information and insights.

During the Design phase, you will use this document to inspire solutions that transform the customer experience by addressing each of the Moments that Matter.



As-Is Journey Map, page 29

Personas

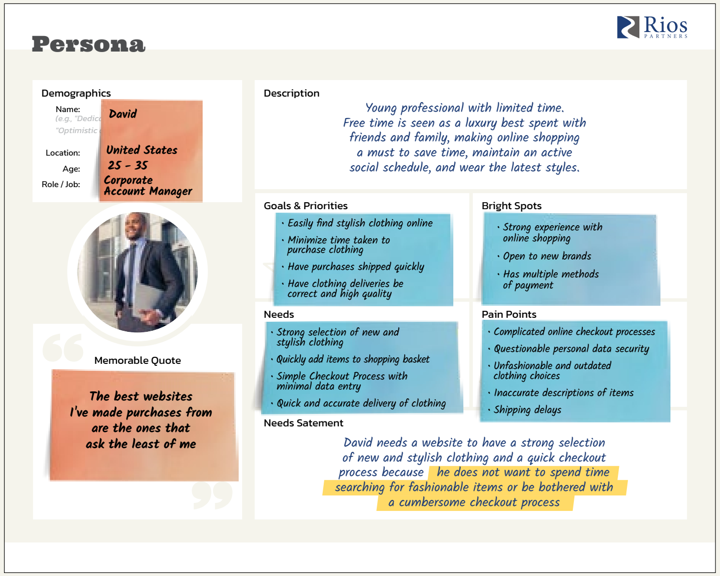
A persona is an archetype representing a specific group of customers or employees that have common needs and/or objectives. Personas ensure that you design for and get feedback from a broad range of customer groups.

Keep in mind that customers may change which persona best describes them over time. Additionally, personas may exist at some points in the journey and not others.

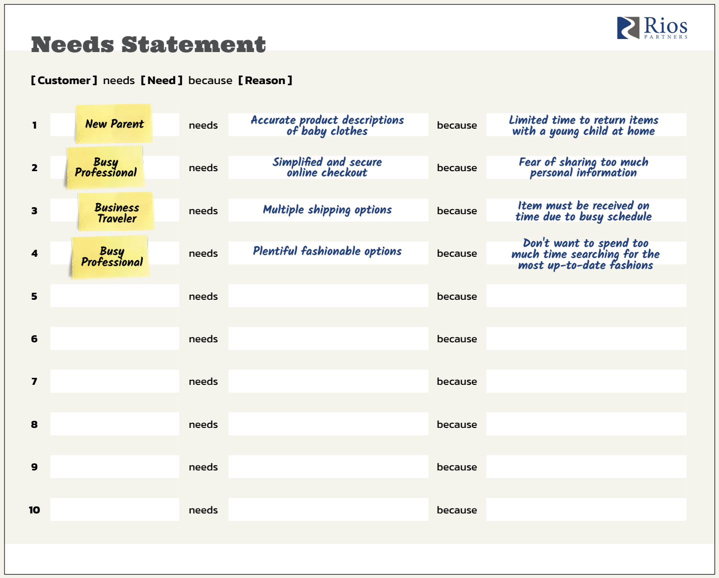
Needs Statements

Needs statements are a concentrated list of the needs that best represent your customer's experience. Write them in the following format: **[Customer] needs [the need] because [reason]**. This straightforward structure forces your team to not only identify what your customers need but articulate precisely why they need it.

Refine your need statements throughout the synthesis process by continuing to ask "why" about the listed "need" and "reason."



Persona, page 31



Needs Statements, page 33

Discover Phase Tools

Table of Contents

p. 17 **Customer Identification Framework**

Question It Answers
Which customers should be included in the research?

What it Does
Creates a detailed view of who your customers are (e.g., behaviors, problems faced, demographics, limitations) to ensure that your research covers a broad range of perspectives, including those at the extremes

p. 19 **Setting Interview Objectives**

Question It Answers
What do we want to learn from this interview?

What it Does
Determines the objectives of your interviews based on your existing hypothesis and questions

p. 21 **Interview Activity Guide**

Question It Answers
What are some activities we can use to get a fresh perspective during an interview?

What it Does
Provides guidelines for three activities you can use to gain insights from customers and employees while interviewing for empathy

p. 23 **Interview Debrief**

Question It Answers
What stood out most during the interview?

What it Does
Records your immediate impressions about the interview while they are fresh in your mind

p. 25 **Point of View**

Question It Answers
What is the perspective of this individual interviewee?

What it Does
Compiles your findings and key takeaways from an interview in a concise and straightforward format that anyone on the project team can easily reference during synthesis

p. 27 **Memorable Story**

Question It Answers
What are the broader implications to the project of a given story?

What it Does
Forces us to think through memorable stories captured during an interview in a way that helps us empathize with the customer and probe the broader implications of the story

p. 29

As-Is Journey Map

Question It Answers
What does the journey look like from the customer's perspective?

What it Does
Documents, visualizes, and provides insights into customers' and employees' needs, pain points, and bright spots over time to identify the moments that matter most in the customer journey

p. 31

Persona

Question It Answers
How do customers sort into groups based on shared needs and objectives?

What it Does
Provides customer archetypes around which you can focus your designs

p. 33

Needs Statement

Question It Answers
What do customers need, and what is the reason behind each need?

What it Does
Articulates the needs you have uncovered in your research to help you keep track of, organize, and prioritize them for the Design phase

Customer Identification Framework

Question it Answers
Which customers should be included in the research?

How To Use It
This template helps you be deliberate about the types of customers you choose to talk to during your Discover research.

1. Start by restating the customer-centric problem you identified in the Frame phase. This reminds you who your customer is at a high level and what you think the overall problem is from the customer's perspective.

2. Use the four categories (behavior, demographics, problems faced, and limitations/constraints) as a starting point to brainstorm as many customer types as you can think of. A whiteboard (real world or virtual) is a great tool to work through this as a group. Use the three boxes within each category to think through how users vary. First generate "dimensions" along which customers could vary (e.g., age, location, frequency of use, mobility). Then, identify possible "mainstream" (typical customer) and "extreme" (e.g., 75+, super-users, home-bound) customers for each of those dimensions.

3. After brainstorming a wide range of customer subgroups, prioritize those you want to target in your research. Return to your overall problem statement to consider what mix of customer types will best help you understand the problem. Be sure to include some extreme users to uncover relevant needs that may not be top of mind for mainstream users.

Customer Identification Framework

1 Restate the customer-centric problem statement:

A ______________ who needs to ______________ feels ______________ because they are facing ______________
(Customer) (Goal) (Emotion) (Barrier, Pain Point, etc.)

2

How do customers vary by **behavior**?

Dimension	Mainstream Users	Extreme Users

How do customers vary by **demographics**?

Dimension	Mainstream Users	Extreme Users

How do customers vary by **problems** faced?

Dimension	Mainstream Users	Extreme Users

How do customers vary by **limitations** and constraints?

Dimension	Mainstream Users	Extreme Users

3 Prioritized User Types

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Setting Interview Objectives

Question it Answers
What do you want to learn from this interview?

How To Use It
Set goals ahead of a customer or employee interview by following these steps:

1. Start by restating the **problem** from the customer or employee's perspective (see **Framing the Problem**, page 17).

2. Next recall the **journey** you want to understand to solve the problem (see **Framing the Customer and the Journey**, page19).

3. **Hypothesize** what customers or employees are experiencing along the journey. Document your current assumptions about what they are thinking, feeling, and doing at each stage of the journey.

4. Set interview objectives based on the hypotheses or assumptions you want to confirm or deny and the questions you want to answer. Start with a long list of potential objectives and narrow it down to your top priorities.

After an interview, update this template to revise your understanding of the problem, journey, and customer/employee experience based on what you learned.

Setting Interview Objectives

Start Here

1

What is the **problem** you think customers/employees face?

2

What is the **journey** you want to understand?

3

What do you think the customer/employee is **experiencing**?

4

Hypotheses to confirm or deny

Questions to answer

Interview Activity Guide

Question it Answers
What are some activities you can use to get a fresh perspective during an interview?

How To Use It
Activities allow you to complement the usual question and answer format of an interview with hands on exercises that will provide fresh insights into the customer's experience. The activity guide includes three options, which you can adapt and add to with additional activities you find helpful in building empathy.

1. **Card sorting:** Asking the participant to provide a ranked order to a list you provide gives you a bit of quantitative insight during a qualitative interview. It's also a great launching point to follow up on the "why" behind their ranking.

2. **Provocations:** Having the participant react to an imaginary scenario can help you get to their core beliefs and motivations by separating them from the context you are trying to understand.

3. **Mind mapping:** Asking a participant to draw what they spend their mental energy may give you a different answer than if you asked them to tell you verbally.

Interview Activity Guide

1 Card sorting

Hand a stack of cards to the interviewee with different words, phrases, or pictures on them.

Ask the participant to rank the cards in order of preference, interest, or another relevant dimension.

Take note of the order they chose, and probe deeper into why the interviewee sorted or ranked the cards the way they did.

2 Provocations

Before the interview, write a handful of prompts that probe on a key element of the problem or experience you are trying to understand, but force the interviewee to think outside of what is currently possible.

For example, when trying to understand how commute impacts morning routines you could say “Imagine a world where teleportation is possible. How would you plan out your morning routine?”

You will find that asking about their experience in this imaginary world, will give you new insights into their experiences in the real world.

3 Mind Mapping

Sketch the outline of a brain on a large piece of paper. Tell the participant the shape represents their brain and the mental energy they use during the day.

Give them several minutes to fill in the brain with sketches of everything they spend their mental energy on during a specified time, like their work day. Ask them to “think out loud” and talk you through what they are drawing and why.

Interview Debrief

Question it Answers
What stood out most during the interview?

How To Use It
Immediately after every interview, the interviewer and note-taker should take at least 15 minutes to debrief on what stood out from the conversation. This template provides space to describe the person's background, what they care and don't care about, key words and phrases, needs and feelings, and memorable moments and stories. There is also space to note "what we missed" as you strive to continuously improve your approach with each interview.

Interview Debrief

Name:

Date:

Location:

How would you describe this person?

What do they care about?

What don't they care about?

Things they said or stories they told that stand out

Key words and phrases

What do they need and **why**?

What did we miss?

What do they feel and **why**?

Point of View

Question it Answers
What is the perspective of this individual interviewee?

How To Use It
You can use the **Point of View** (POV) template to create an easily sharable artifact that will bring other team members up to speed on a single customer or employee's experience. By capturing bright spots, pain points, needs, quotes, and memorable stories, the POV gets everyone on the team immersed in the key insights quickly.

Using your annotated notes and debrief, populate the relevant sections of the POV.

Point of View

Name:

PHOTO

Background

Bright Spots

Powerful Quote

Pain Points

Memorable Story

Need Statement *("This person needs ___________ because ___________")*

Key Takeaways

Ideas *("How might we give this person what they need?")*

Memorable Story

Question it Answers
What are the broader implications to the project of a given story?

How To Use It
Stories provide a richer picture of a person's experience than more generalized statements. Identify one or more stories that stand out from the interview.

1. Write out one story per template.
2. Describe why the story interests you, what problem it illustrates, and what it would mean if this problem were representative of a larger group.

Memorable Story

What is the story?

Why is it interesting to you?

What problem is illustrated in this story?

What would it mean if the story was representative of a large population?

How might we give this person what they need?

As-Is Journey Map

Question it Answers
What does the current journey look like from the customer's perspective?

How To Use It
The template helps you empathize with both the user (front stage) and the employee (backstage). It helps you see the entire journey from both perspectives and easily spot areas for improvement.

1 Start by identifying the stages of the journey you are mapping.

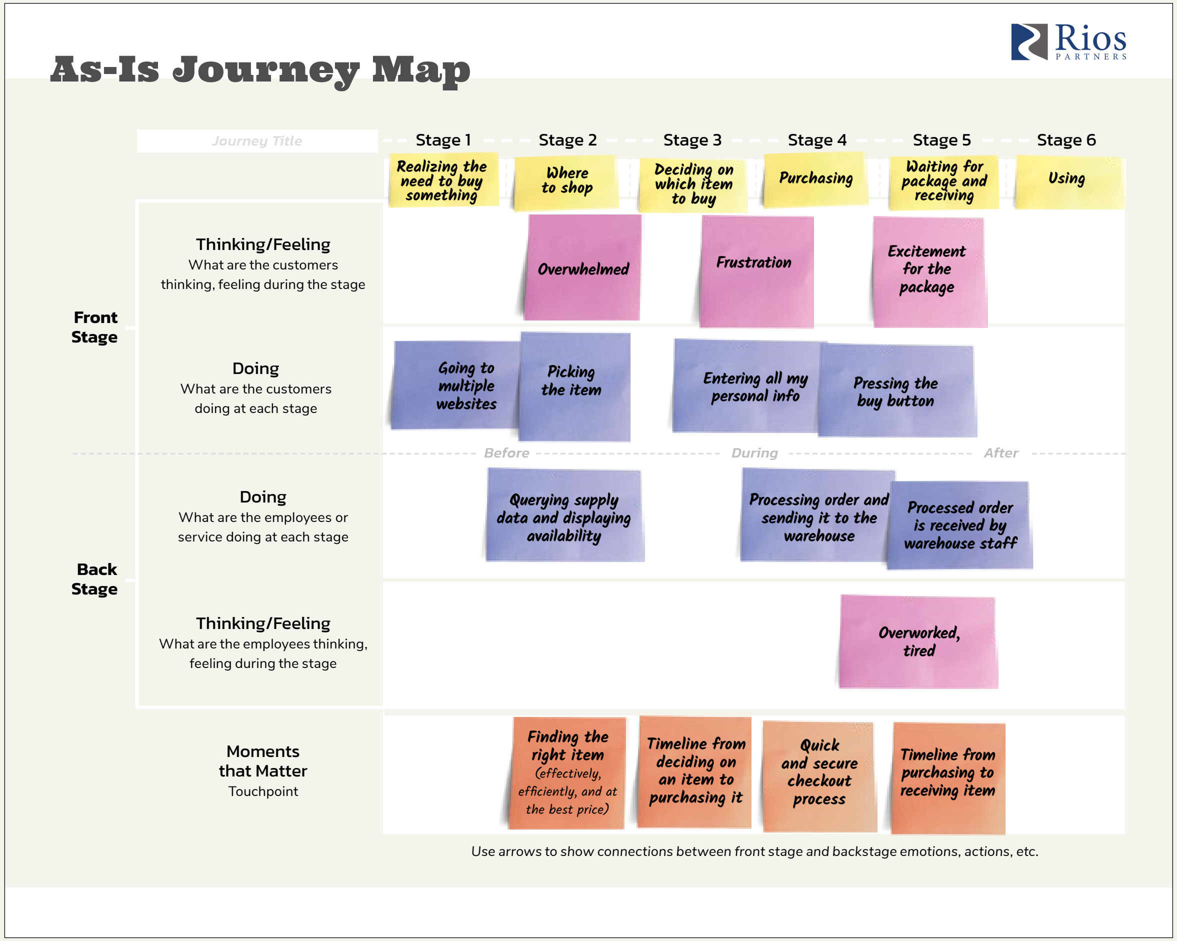
2 Draw or write out them across the top. Don't overcomplicate them.

3 Then, draw or written the step-by-step experience for your customer in the 'doing' row.

4 In the 'thinking, feeling' row, write in what the customer is thinking or feeling when going through the experience for each stage.

5 Now, repeat this for the employee's experience. Some steps will be a process e.g., computer system.

6 At the bottom, fill in what moments that matter and why. What are the most critical moments in the customer's journey that will make or break their experience?



As-Is Journey Map

Journey Title	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Stage 6
Front Stage — **Thinking/Feeling** What are the customers thinking, feeling during the stage						
Front Stage — **Doing** What are the customers doing at each stage						
	Before		*During*		*After*	
Back Stage — **Doing** What are the employees or service doing at each stage						
Back Stage — **Thinking/Feeling** What are the employees thinking, feeling during the stage						
Moments that Matter Touchpoint						

Use arrows to show connections between front stage and backstage emotions, actions, etc.

Persona

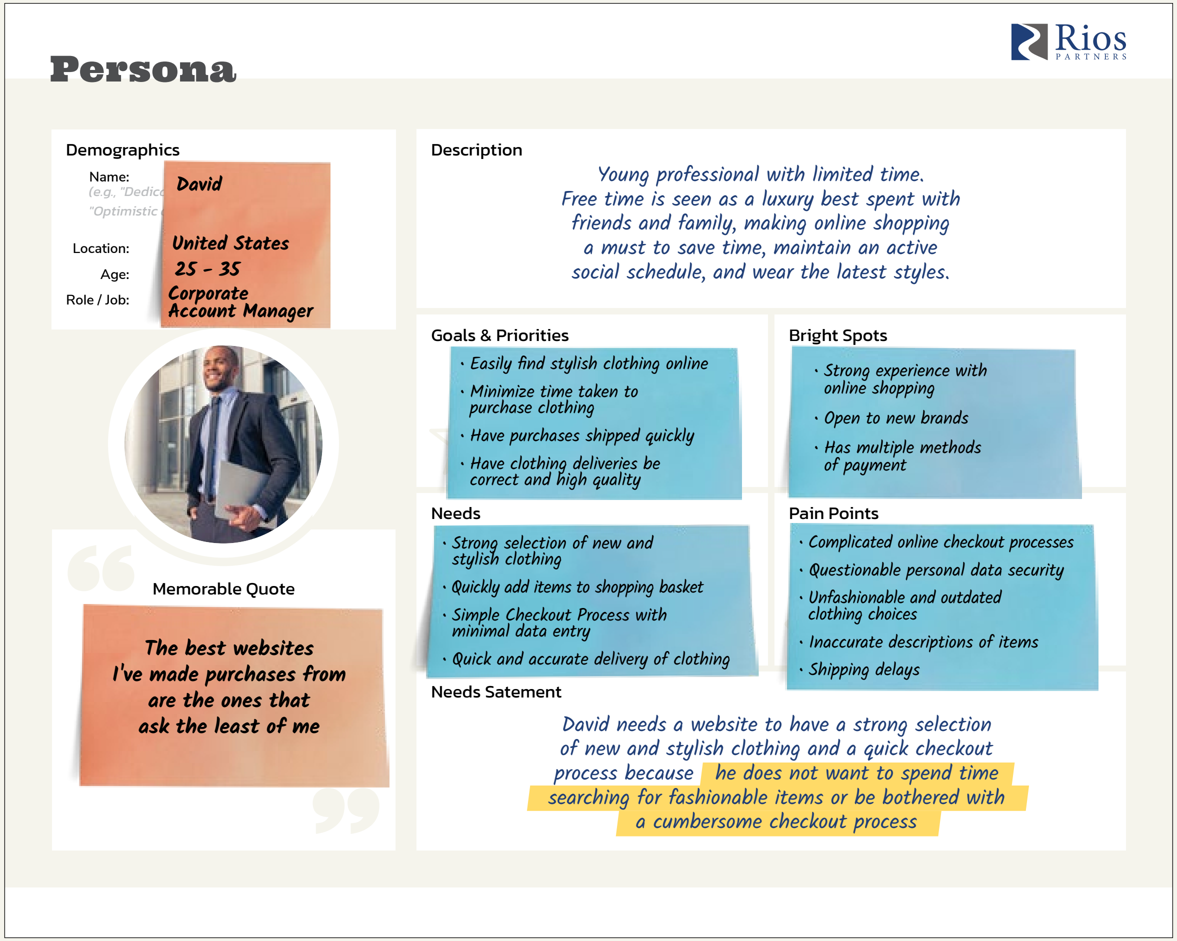
Question it Answers

How do customers sort into groups based on shared needs and objectives?

How To Use It

Personas are archetypes that describe goals, needs, and behavioral patterns among customers. Each persona highlights a set of **unique elements** that **exists in each of the personas**.

1. Cross-case analyze your research and determine patterns and commonalities in your customers.
2. Identify common threads through stories that create themes of behavioral (goals, needs, bright spots, and pain points) and demographic responses.
3. Then map the individual interviewees responses into behavioral and demographic patterns.
4. Now identify patterns among responses.
5. Use these patterns to differentiate the personas.
6. Fill in each persona, creating a fake name that summarizes the defining characteristic of this persona (e.g., "Dedicated caregiver," "Optimistic dreamer," "Anxious father").
7. Each persona will not be an exhaustive list for each population but will be a must-have list for meeting the customer requirements.



Persona

Demographics

Name:
(e.g., "Dedicated caregiver," "Optimistic dreamer," "Anxious father")

Location:

Age:

Role / Job:

Insert Picture

Memorable Quote

Description

Bullet points that describe your customer's desires, attitudes, and behaviors

Goals & Priorities

Bright Spots

Needs

*[Persona title] **needs** [X] **because** [Y]*

Pain Points

Needs Satement

***A** [Persona title] **needs** [insert key needs] **because** [insert pain points]*

Needs Statement

Question it Answers

What do customers need, and what is the reason behind each need?

How To Use It

Before you conclude the Discover phase, pare down the long list of needs you've identified into a smaller list of need statements that best represent the customer's experience across everything you've learned.

1 Start by brainstorming a large set of needs statements generated during your synthesis sessions that represent the needs of the customers you spoke to during the Discover phase.

2 Vote on the needs that you think are most important to the customer and that have the greatest impact on their experience. As team, select a core set of needs (8 to 10 is a good target) to carry forward as guiding lights into the Design phase.

3 Discuss the reason behind each need, and the reason behind the reason, to iterate your needs statements (rewriting or combining them) until you are satisfied that they describe core customer needs you want to prioritize for Design.

Needs Statement

[Customer] needs **[Need]** because **[Reason]**

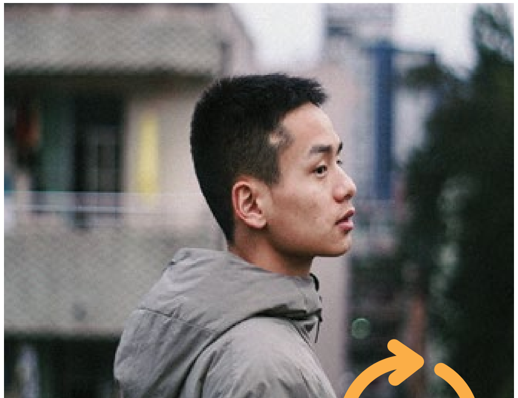
1	New Parent	needs	Accurate product descriptions of baby clothes	because	Limited time to return items with a young child at home
2	Busy Professional	needs	Simplified and secure online checkout	because	Fear of sharing too much personal information
3	Business Traveler	needs	Multiple shipping options	because	Item must be received on time due to busy schedule
4	Busy Professional	needs	Plentiful fashionable options	because	Don't want to spend too much time searching for the most up-to-date fashions
5		needs		because	
6		needs		because	
7		needs		because	
8		needs		because	
9		needs		because	
10		needs		because	

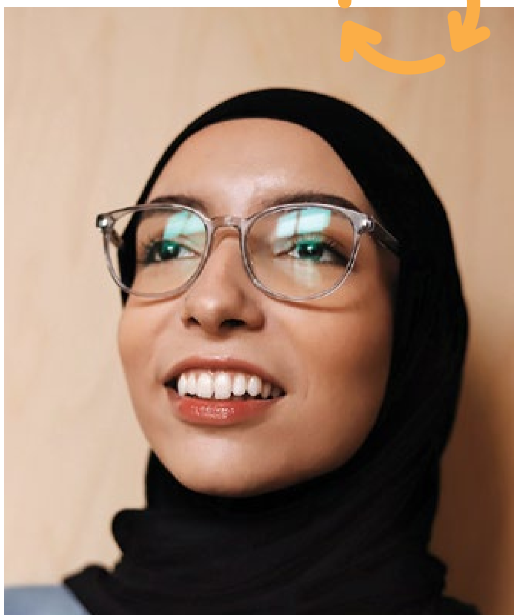
Needs Statement

[Customer] needs **[Need]** because **[Reason]**

1		needs		because	
2		needs		because	
3		needs		because	
4		needs		because	
5		needs		because	
6		needs		because	
7		needs		because	
8		needs		because	
9		needs		because	
10		needs		because	

Notes and Drawings





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