# METHOD SELECTION POOL

improved method selection for developing customer insights

PROJECT REPORT • STRATEGIC CO-DESIGN 2017 • AALTO UNIVERSITY

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# Project Brief

As part of the Master's level course, **Strategic Co-Design** at Aalto University, our brief was to design a method selection tool for OP Financial Group (OP) and their in-house Design Unit. OP is one of the largest financial institutions in Finland and their business areas include banking, health and wellness, non-life insurance, and asset management.

## Design Requirements

The brief asked us to **narrow down methods dealing with customer insights** so OP designers can strive towards better customer-centric design.

Based on the discussions with OP, our main understanding was that OP Designers want to be more effective at selecting a method. They want to feel assured in choosing a method that would work best in the project or case that they are working on at any given moment.

This **lack of assurance** led OP Designers to using only a small set of methods that they were used to, even though there may be other methods better suited for the task. In addition, OP designers are always on a busy schedule and not able to allocate much time to learn new methods. They don't have the time to acquire sufficient design knowledge to compare and modify design methods by themselves. Therefore, our selection tool needs to work towards giving them a single method at the end.

## Other Considerations

The project scope of the OP Design Unit is the stage before the 'development train', meaning the end result is a design concept rather than an implementation-ready service or product.

The preliminary customer research is not part of OP Design Unit's responsibility. The preliminary research is outsourced to external agencies and is reserved for the new Customer Insight Unit.

**OUR DESIGN GOAL:**

**Streamline a method selection process that helps OP develop customer insights more effectively and enables OP designers to feel comfortable trying a new method**

## Users & Customers

Throughout this report, **"users"** refer to **OP designers** who would be using our selection tool. OP's customers will not be called users but referred to as "customers".

## Customer Data & Customer Insights

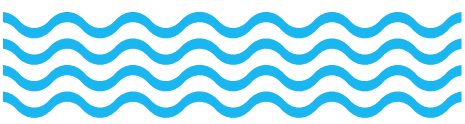
It is important to emphasize that "customer data" is different from "customer insights".

**Customer data** is items of information about the customer and is translated into customer insights. **Customer insights** are understandings of the customer that sheds light on or helps solve a design project.

# Our Proposal, Part 1: **OP Pool of Methods**

The first part of our proposal is to establish an OP pool of methods. As illustrated below, we have narrowed it down to **20 methods of developing customer insights.** We believe 20 is a manageable number for OP designers to get familiar with. Also, an established set helps build a shared and clear understanding of "OP ways" of doing customer-centric design. This is more efficient and effective than selecting from hundreds of methods since some of them may not be applicable for OP for the purpose of generating customer insights.

| | | | |
|---|---|---|---|
| Day-in-the-life Scenario | Customer Empathy Mapping | Persona Profile | Customer Journey Mapping |
| Service Blueprint | Experience Prototyping | Quick & Dirty Prototyping | Fake Advertising |
| Survey / Questionnaire | Focus Groups | 1-on-1 Interview | Design Ethnography |
| Service Safari | Co-Design Workshop | Lead User Study | Benchmarking |
| Market Analysis | Reverse Engineering | Cultural Genre / Convention Analysis | Mega Trend Analysis |



# Rationale Behind Selecting 20 Methods

Upon reviewing several existing method decks and playbooks, we gathered methods that deal with developing customer insights. We decided not to include the following:

- Methods that are preliminary ideation tools such as collage, sketching, dot voting, card sorting, and mind mapping.
- Methods that are more about ways of working such as design sprint, and affinity diagramming.
- Methods that are more about assessing projects internally such as SWOB (strength, weakness, opportunities, barriers), and business model canvas, value proposition.
- Methods that are ideation triggers to be more creative such as analogies/metaphors, re-framing, five-whys, mash-up, and wizard-of-oz scenario. These can be used as a design activity with customers or within the design team. We thought that this is too granular in scale for our purposes.
- Methods that are more suitable during OP's 'development train' stage such as usability testing and heuristic analysis.

It should be considered that for OP's pool of methods was that this pool is for their Design Unit. Our contact from OP emphasized many times that we need to focus on how the Design Unit is going to utilize our selection tool. Therefore we included methods such as shadowing and observations under "design ethnography". Shadowing, observation, interviews, on their own requires a lot of time and we interpreted that these are the methods reserved for the Customer Insight Unit or external agencies when they do preliminary research work.

Afterwards, we grouped methods that are similar or belong under a bigger umbrella method. For OP, we envision each method description to be crafted in such a way that they include methods that are identical but are named differently or methods that are slight variations. Here is a list of some of the groupings that we did:

**Day-in-the-life Scenario** includes user scenarios, user-day parting, storyboarding, scenario mapping, photo essay, and storyworld.

**Customer Empathy Mapping** includes customer needs assessment/statements, hopes and fears mapping, customer priorities mapping, and empathy grid (says-thinks-does-feels).

**Persona Profile** includes composite character and customer portrait.

**Experience Prototyping** includes bodystorming, informance, roleplay insights, scenario testing, service staging, and desktop walk-through.

## Other Considerations from Reviewing Existing Method Selection Tools

In addition to reviewing methods in detail as described in the previous page, we reviewed existing method selection tools and what metrics they used.

The most common metric is to categorize based on 'when' during a design process the method is used: project stages such as 'research', 'ideation', 'implementation', and 'testing'. However, we were advised that the question of 'when' is not part of our scope. It was the scope of teams doing the assignment Brief 1 in this course. Therefore, we established a hypothesis that **OP designers will use our selection tool at any point of the project** and **as many times as they need.**

The other common metric was the level of resources, such as time and number of staff. Since the scope of OP projects vary so much between 50,000 to over 1 million euro, in addition without knowing the type of projects that OP typically

does, we determined that it is rather difficult for us to assign numerical values on how many hours or how many people a method requires. During the tutoring session, it was discussed that there's a minimum amount of time required to do a method. Therefore, we decided to **arrange our methods in groups, while comparing methods and consider them relative to each other,** 'would this method take more time and people than this other method?'

From examining existing selection tools, the two key points we took away were:

- If we use a scale system, use a system with no more than 5 increments.
- The method description should be easy and quick to understand.

Even though we want our selection tool working towards giving the user a single method at the end, we are aware that it is impossible to suggest the perfect method for a task even with 20 or 30 metrics. A design project includes many variables and is in constant flux. This fact is evident in existing selection tools and playbooks. Existing tools use terms like "this is only a suggestion" or "this is a starting point for you to consider".

Existing method decks and playbooks lack consideration using **various sources of customer representations.** Based on our learning from the course Strategic Co-Design, we decided that customer representation is an important aspect. Please refer to page 8 for more information on how we considered customer representations and what it means.

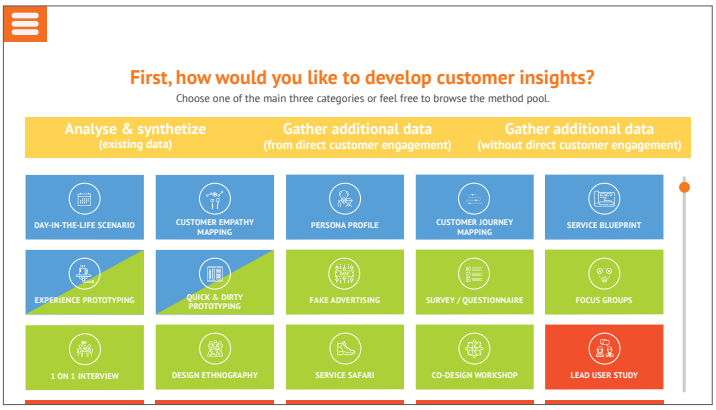
### Benchmarking from Existing Method Selection Tools

Here is a list of existing method collections and selection tools that we reviewed in depth:

» **IBM Design Thinking Field Guide** (2017), by IBM
» **18F Method Cards** (website), a design initiative by the US government
» **Bootcamp Bootleg**, by d.school, Institute of Design at Standford
» **Design Kit** (website); **IDEO Method Cards** (2003); **The Field Guide to Human-Centred Design** (2015), by IDEO
» **Design-Led Research Toolkit** (2017), by Parsons Transdisciplinary Design Program
» **Design Method Toolkit** (website) by MediaLAB Amsterdam
» **Design Methods for Developing Services** (2014), a joint initiatives by the Technology Strategy Board and the Design Council, UK
» **DIY Toolkit,** an initiative of Nesta, designed by STBY and Quicksand
» **HI Toolbox** (website) by Hyper Island
» **Innovating for People: Handbook of Human-Centred Design Methods** (2012), by LUMA Institute
» **MAPS 2.0** (website) by Dr. Gesche Joost, Design Research Lab, Telekom Innovation Lab
» **MethodKits** (2012-2017), a commercial toolkit of method cards and playbooks
» **MindLab Methods** (website), by Ministry of Business and Growth, Denmark
» **Open Innovation Toolkit** (website) by Mozilla Corporation

# Our Proposal, Part 2: **Method Selection Tool**

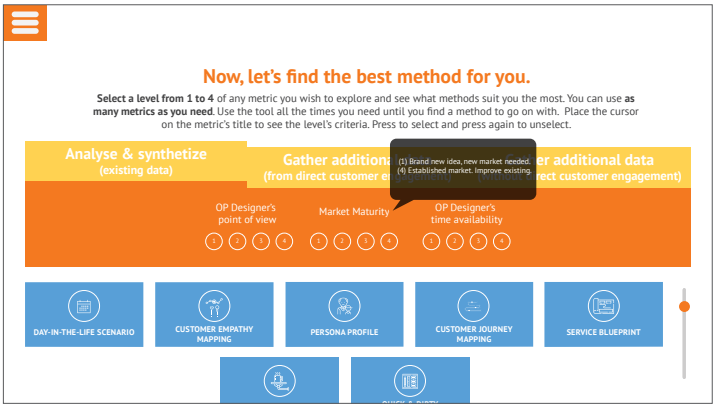
Our proposal, the Method Selection Pool is an **online platform** where any OP designer can use to select customer insight methods. Our selection tool uses **two stages of filtering.**




**Stage 1** addresses the user's intention by asking "how would you like to develop customer insights?" Three options are provided for the user to choose:

1. By analyzing and synthesizing existing data
2. By getting additional data from direct customer engagement
3. By getting additional data without direct customer engagement

At this stage, the 20 methods are divided into 3 categories.




**Stage 2** addresses additional metrics using a scale rating system of 1 to 4. All stage 2 metrics are shown together on a single screen so the user can decide on their own which one to consider first. The methods can be narrowed down until there is one method left.

## Our Method Selection Tool & Method Mixing Strategies

Our selection tool can be used as many times as necessary during a project depending on OP user's needs, at any stage of the project. Through multiple use of the selection tool when customer insight is required, multiple combinations of methods can be used throughout a project, thereby employing method mixing strategies.

# Rationale Behind Stage 1 Selection

This section describes the rationale on how we grouped 20 methods into 3 categories.

### Developing customer insights from "existing data" vs. "additional, new data"

During the discussions with OP, it was stated that designers at the OP Design Unit usually start their projects with customer data already gathered before from the new Customer Insight Unit or external research agencies. However, it is also possible for the designers to go out (or outsource to external agencies) and gather additional customer data if the project stage or task requires such information.

While considering these scenarios at OP, we divided our 20 methods into two categories first:

- Developing customer insights by analyzing and synthesizing existing data
- Developing customer insights through getting additional data from customer engagements

The methods listed in the first category such as building day-in-the-life scenarios and customer journey maps can of course be done with customers. However, when compared to the second category of methods, the first set of methods is clearly more beneficial and efficient for OP resources when used to analyze and synthesize existing data. The methods listed in the second set cannot be done without engaging customers.

| | | | | |
|---|---|---|---|---|
| Day-in-the-life Scenario | Customer Empathy Mapping | Persona Profile | Customer Journey Mapping | Service Blueprint |
| Experience Prototyping | Quick & Dirty Prototyping | Fake Advertising | Survey / Questionnaire | Focus Groups |
| 1-on-1 Interview | Design Ethnography | Service Safari | Co-Design Workshop | Lead User Study |
| Benchmarking | Market Analysis | Reverse Engineering | Cultural Genre / Convention Analysis | Mega Trend Analysis |

**Methods to analyze and synthesize existing data**

**Methods to get additional data from direct customer engagement**

**Methods to get additional data without direct customer engagement**

## Two different ways of getting additional customer data: "from direct customer engagement" vs. "without direct customer engagement"

The framework we used to distinguish between "from direct customer engagement" and "without direct customer engagement" is from the concept of "user representations" (Hyysalo & Johnson 2015; 2016)*. "User representations" can be drawn from 8 different sources as illustrated in the diagram below (Hyysalo & Johnson 2016)*. Based off of these 8 areas, we looked at different sources of customer representations. We then used these sources as the basis of "customer insights" and then re-grouped and re-named them to fit OP's context.

In some cases, we removed an entire source area such as "Regulatory Demands" in our selection tool because this is a requirement for OP regardless of what method is used. Reviewing regulatory rules and standards are inherently built into the design process for OP due to the nature of their business area.

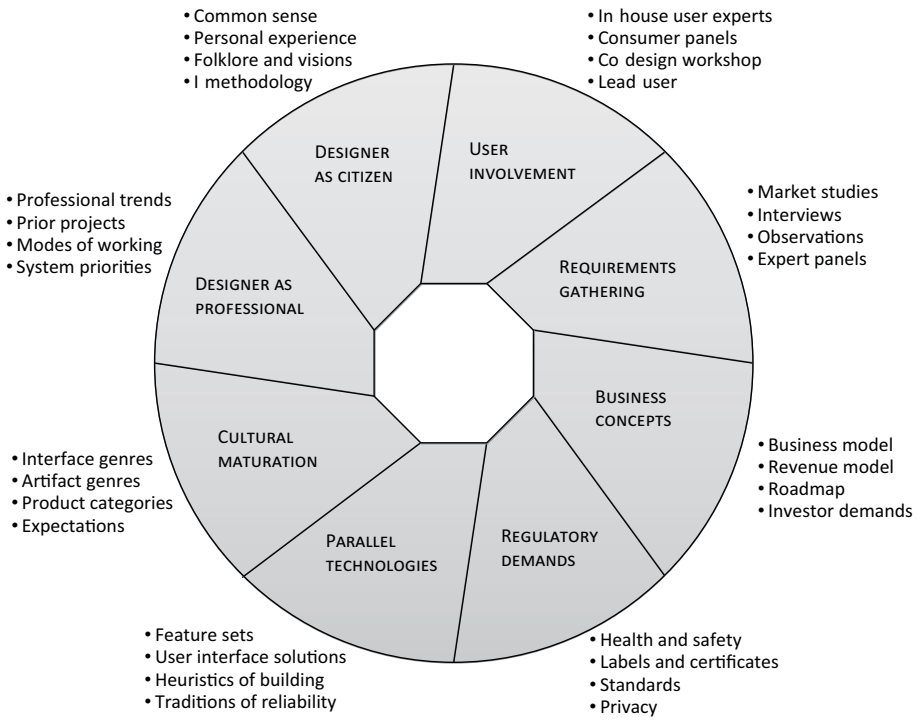
From the major source areas of "User Involvement" and "Requirements Gathering", we used some sub-sources (such as co-design workshops, interviews and observations) for "methods with direct customer engagement" and the other sub-sources (such as lead-users and market studies) for "methods without direct customer engagements".

For "Designer as Citizen" and "Designer as Professional", we embed them into a metric in Stage 2 of our selection tool. We have a metric asking if OP designers can "fake it internally" instead of engaging the customers. The underlying concept is that this metric asks if the designers can use their prior project knowledge, personal experience or common sense to do the task without getting customers involved.

***References**


Hyysalo, Sampsa and Mikael Johnson. 2014. "The User as Relational Entity: Options that Deeper Insight into User Representations Opens for Human-Centred Design." *Information Technology & People* 28 (1): 72-89.

Hyysalo, Sampsa and Mikael Johnson. 2016. "User Representation: a Journey Towards Conceptual Maturation." *New Production of Users: Changing Innovation Collectives and Involvement Strtegies* . Eds. Sampsa Hyysalo, Torben Elgaard Jensen, and Nelly Oudshoorn. New York; London: Routledge 2016. 75-100.


This image shows **8 major sources** and **sub-sources** of user representations in design

[Image from Hyysalo & Johnson 2016]*

# Rationale Behind Stage 2 Selection

At Stage 2 of the method selection tool, we used a scale rating system of 1 to 4. When using a scale of 4 increments, there is less room for misinterpretation. For example, in a 10 increment scale, people's sense of degrees between 3 and 5 may vary a lot. Also, by using a smaller scale, it's quicker for the user to understand and decide.

For each metric we described what both ends of the scale represent.

At this stage, our tool asks the user for three additional metrics:

- **Market Maturity:** The user's project involves a brand new idea with a new market need ***or*** improvements of existing product/service in an established market
- **Breadth of Customer Understanding:** Expansive encompassing customer's day-to-day life and society ***or*** a narrower focus on customer's interactions with the OP product service
- **OP Designer's Time Available:** How much time the user has available to spend for a method

The above three metrics are required no matter what the intention of the user is. Whether the intention is to analyze existing data, get data through direct customer engagement, or get data without direct customer representation.

However if the intention of the user is to get data through **direct customer engagement** then the tool asks for three additional metrics:

- **Level of Customer Involvement:** The user is looking to get the most active contribution and more time from the customer ***or*** get passive contribution with the least amount of time from the customer involved in the method
- **Number of Customer Recruitment:** The user is looking to engage the highest number of customers ***or*** the lowest number of customers in the method
- **Fake It Internally without Customers:** The user is able to fake the method without customers ***or*** it is impossible to fake the method without customers

Please see page 10 for a chart demonstrating how we mapped out all the methods. This chart describes how each method corresponds to each numerical value on the corresponding metric scale. This is our suggestion on the metric rating system, it can be further tweaked for greater accuracy through further research and analysis.

## Methods to analyze and synthesize existing data

| | Day-in-the-Life Scenario | Customer Empathy Map | Persona Profiling | Customer Journey Map | Service Blueprint | Experience Prototyping | Quick & Dirty Prototyping | |
|---|---|---|---|---|---|---|---|---|
| Market maturity | 3 | 4 | | 2 | | 1 | | Brand new idea, new market need (4)<br>Established market, improve existing (1) |
| Breadth of customer understanding | | 4 | | 3 | 1 | 2 | 1 | Expansive to customer's day-to-day life & society(4)<br>Narrower to customer and OP service/product (1) |
| OP Designer's time available | | | | | | | | Highest (4)<br>Lowest (1) |

## Methods to get additional data from direct customer engagement

| | Fake Ads | Survey / Questionnaire | Focus Groups | 1 on 1 Interview | Design Ethnography | Service Safari | Co-Design Workshop | Experience Prototyping | Quick & Dirty Prototyping | |
|---|---|---|---|---|---|---|---|---|---|---|
| Market maturity | 4 | 3 | | 2 | | 1 | 2 | | | Brand new idea, new market need (4)<br>Established market, improve existing (1) |
| Breadth of customer understanding | 3 | 2 | | 3 | 4 | 1 | 3 | 2 | 1 | Expansive to customer's day-to-day life & society(4)<br>Narrower to customer and OP service/product (1) |
| OP Designer's time available | | | | | | | | | | Highest (4)<br>Lowest (1) |
| Customer involvement level | 2 | | 3 | | 2 | 1 | 4 | 3 | | Most active contribution & More time req. (4)<br>Passive contribution & Least time req. (1) |
| Customer recruitment number | 4 | | 3 | 1 | 2 | 1 | 3 | | | Highest number of customers engaged (4)<br>Lowest number of customers engaged(1) |
| Fake it internally without customers | 2 | | 3 | | 1 | | 4 | | | Yes, we can fake it (4)<br>No, impossible to fake it (1) |

## Methods to get additional data without direct customer engagement

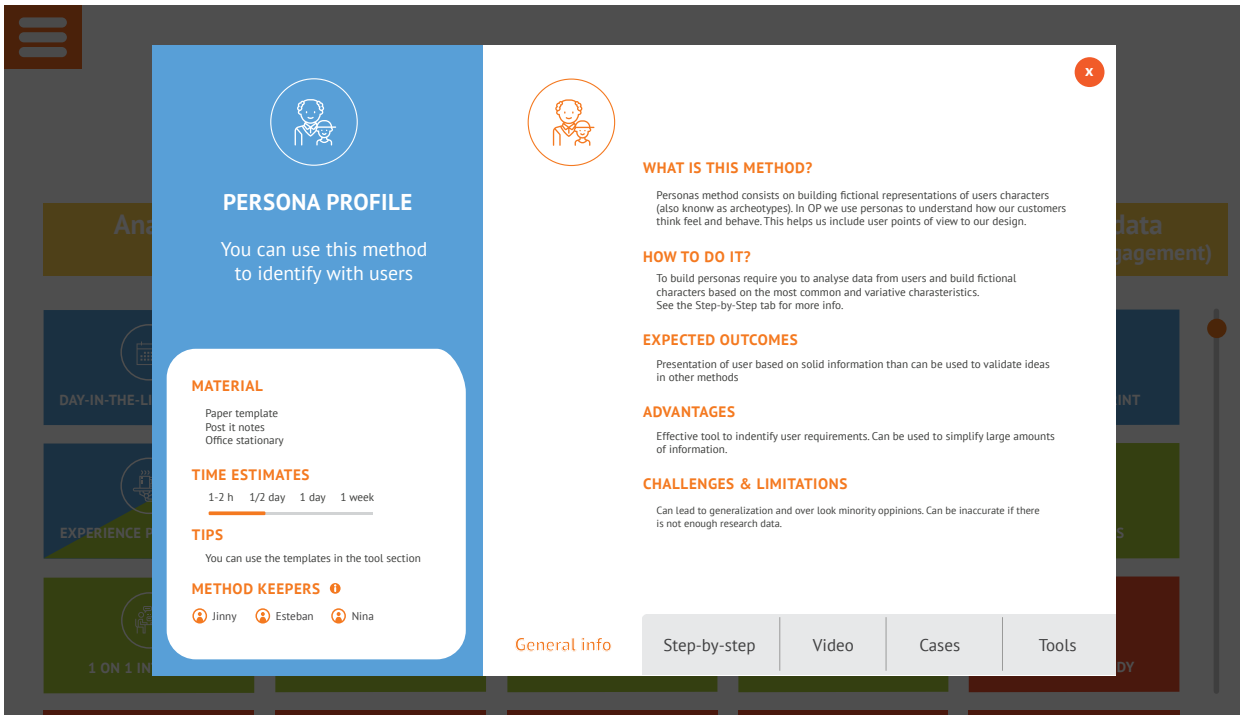
| | Lead User Study | Benchmarking | Market Analysis | Reverse Engineering | Cultural Genres / Convention Analysis | Mega Trends Analysis | |
|---|---|---|---|---|---|---|---|
| Market maturity | 3 | 2 | | | 1 | 4 | Brand new idea, new market need (4)<br>Established market, improve existing (1) |
| Breadth of customer understanding | | 2 | | 1 | 3 | 4 | Expansive to customer's day-to-day life & society(4)<br>Narrower to customer and OP service/product (1) |
| OP Designer's time available | | | | | | | Highest (4)<br>Lowest (1) |

# Our Proposal, Part 3: **Method Cards**

A method card includes information about a method in an easy to understand manner.

- The **“general info” tab** includes brief descriptions, expected outcomes, advantages, and challenges/limitations.
- The **“step-by-step” tab** includes general procedures to inform the user what is required to perform the method at minimum.
- For the **“video” tab,** we recommend OP to build media resources for the users. The videos can be produced in-house or link from other sources.
- The **“cases” tab** is where OP can link relevant project cases from OP or external sources and promote the best practices for the method.
- The **“tools” tab** provides links to OP templates.

On each method card, **3 method keepers** are listed. They are the people who used the method most recently during their projects. They will be the best people to consult if the user has any questions regarding the method since their knowledge of the method is still fresh in their mind relatively speaking. (Please see page 12 for more information on Method Keepers.)



# Our Proposal, Part 4: **Method Keepers**

On the outset of a project when the project team is assembled, the team **assigns a method keeper.** The method keeper is responsible for understanding the method being used, providing feedback on its use, and making notes or media recordings on its usage. If the method keeper leaves the project, another person will be assigned to the role within the project team.

## Strategic Values of Method Keepers

In our method selection tool, Method Keepers are valuable because it **helps OP designers feel more comfortable trying a new method** by knowing that someone else in the company has tried the method already. They have the option to have a conversation about the method together.

We see **additional strategic value for OP** in integrating the method selection tool and method keeper concept into the project templates that are being designed by groups doing Brief 3 in this course. We suggest that the project templates include a section on customer insight methods, and the method keeper is responsible for filling out this section.* These documents will be kept on record, and over time a knowledge base is built collectively by OP designers.

*Note: We didn't design this portion of the project template since it is outside of our design scope. Our project scope was to design a method selection tool and we were instructed not to design how different solutions from different brief groups would work together.

## Initial Launch

When the method selection tool is first launched, we understand that the "method keeper" section in the method card will be empty.

We suggest that the first group of method keepers be manually inputted based on who used the method before or knows about the method from their previous experience. If there isn't a sufficient amount of people who can be listed as method keepers, OP could have a department-wide education day in which the 20 methods are taught and method keepers assigned.

# Thoughts on Rating Systems & Emails/Chats

### Rationale behind why we didn't go in other directions such as rating systems, emails/ chats as selection tool resources

During our design process, we have considered rating systems and internal emails and chats as resources that would be linked to a method selection tool. However, based on years of our professional working experience as well as what we learned while researching other companies' practices on internal communications and collaboration methods for other design projects, here are some of the reasoning behind why we didn't go in the direction of the aforementioned ideas.

It is unlikely to that workers will engage meaningfully with questionnaires or reviews as these requirements will add an additional work load to their process. The 'crowd-sourcing' model doesn't work in a workplace unless the workers get a dedicated time and gets compensated for their efforts. The workers prioritize and focus on their main job responsibility rather than the other extra tasks. The extra tasks will get pushed further down their list of things to do. If OP wants their employees to fill out questionnaires or reviews, the task has to be a part of the worker's official duty and OP has to be willing to invest in that additional time.

We decided not to include emails and chats in our selection tool because workers already feel bombarded by emails and internal chat messages. It is even more difficult in a big company. It's not considerate of us to add additional layers of online chats or email messages that the workers receive during a day. If we do add that function, we need to meaningfully consider what a day of an OP designer involves and design to help them. However, for the scope of this project our design team was not given access to the users in this project to study the impacts of these additional layers of communication would affect their daily workload.

Rating systems or displaying how many people inside OP have used certain methods go against the brief. The methods that are rated the highest or used the most are the methods that they are already comfortable with. Other workers are most likely to use the methods that seems more successful, hence more comfortable. It is very possible that by including these systems certain methods will get pushed to the top of the list and designers will be rotating between the same most used methods without expanding beyond them. The brief says that OP wants their designers to try methods that they haven't tried if it is deemed more suitable for their task. By excluding this information, it increases the likelihood that OP designers will expand beyond the usual set of methods.

# Appendix
# Interface Mock-Up

# Hi! Welcome to the Method Selection Pool

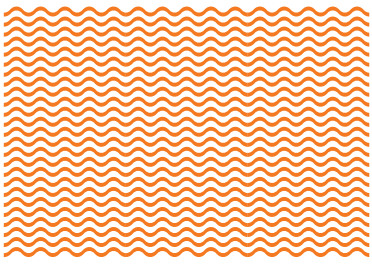
About Tutorial Get started Feedback

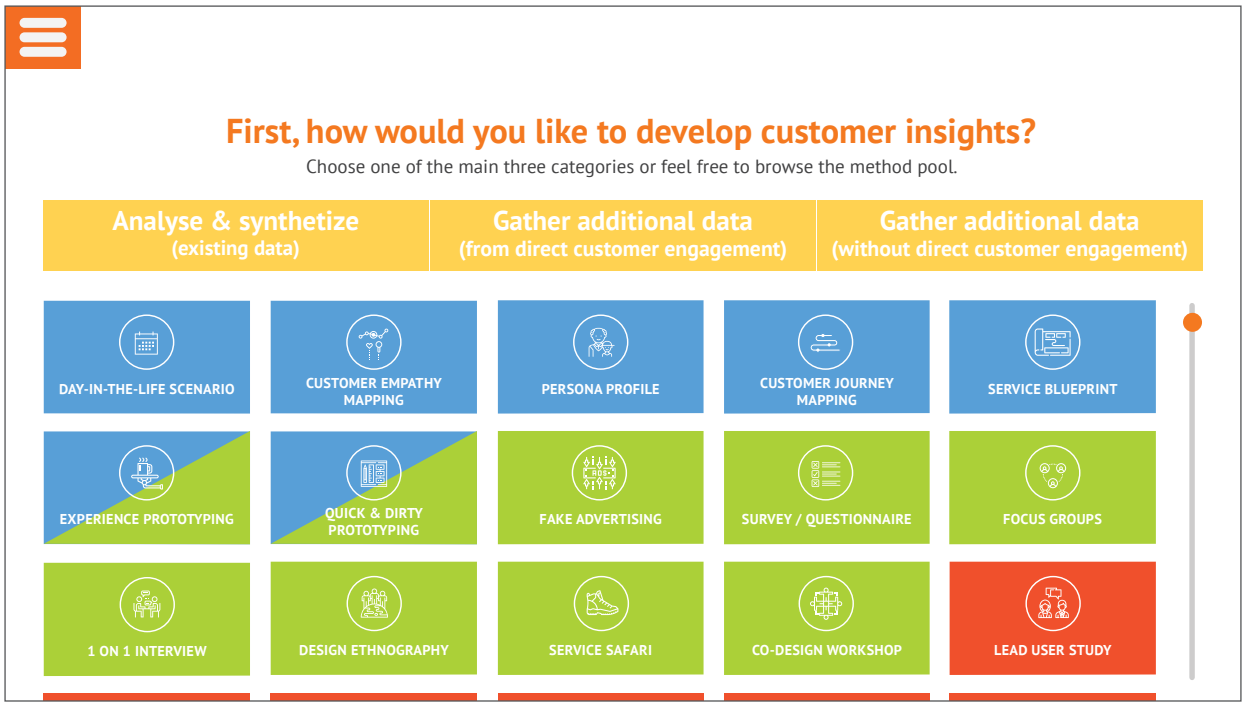
## What is the Method Selection Pool about?

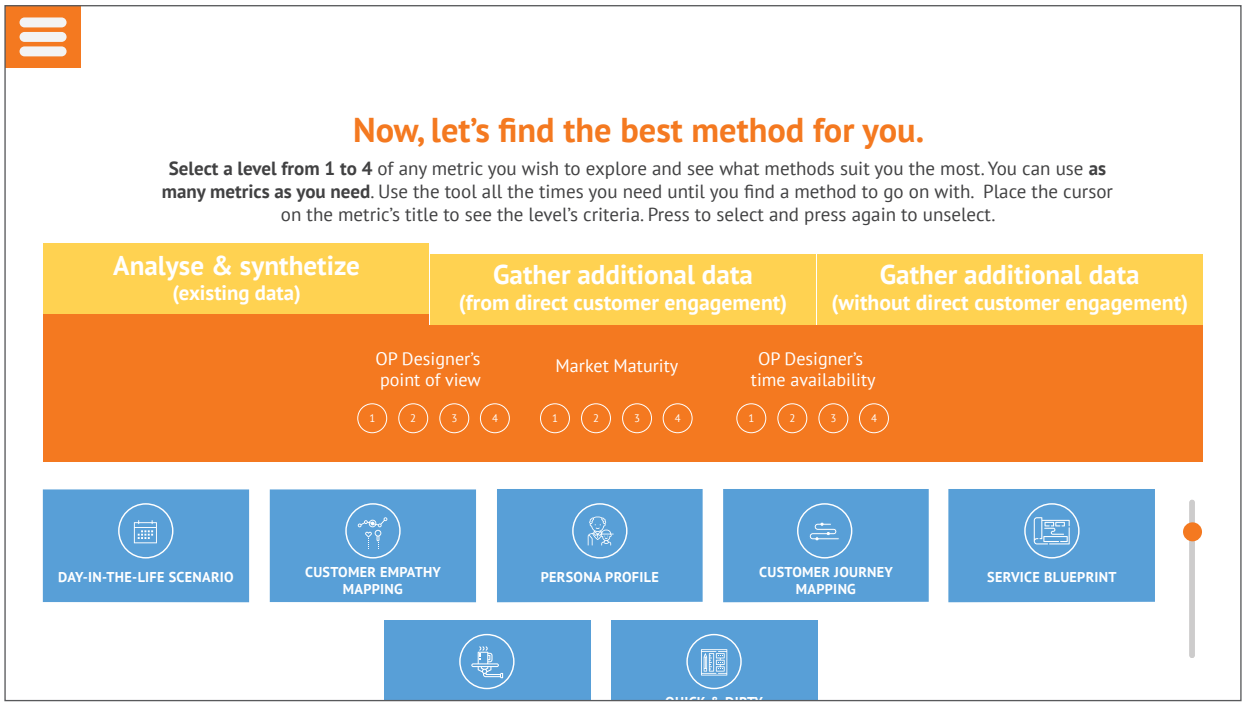
Welcome to **OP's Method Selection Pool**. This is a tool designed to help you find the **most suitable methods** to try during the **Insight implementation phase**. By using this tool you're contributing to OP's vision of a more **strategic and customer-centric** approach as a company. Feel free to use it at the beginning of every project and remember to **document and share** your experiences with your **Method keeper**.

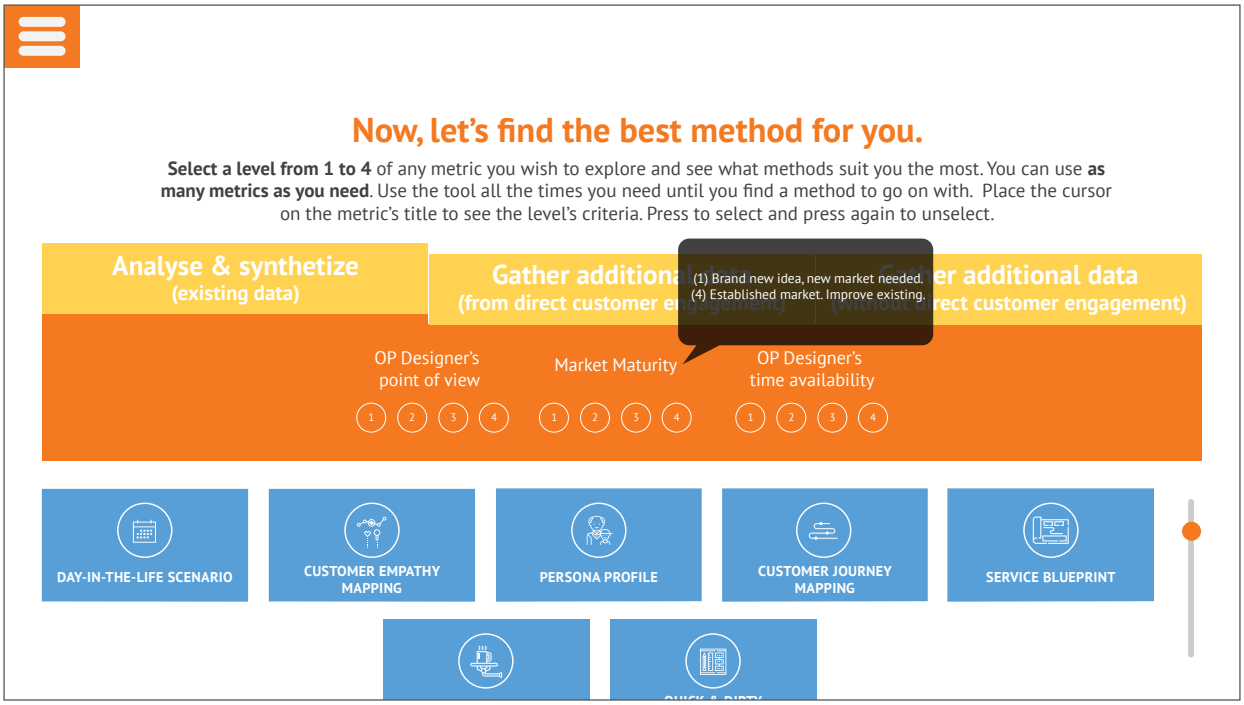
Use the menu bar above to explore the tool, watch a tutorial or get started.

Have fun and great projects!




First, how would you like to develop customer insights?
Choose one of the main three categories or feel free to browse the method pool.
Analyse & synthetize
(existing data)
Gather additional data
(from direct customer engagement)
Gather additional data
(without direct customer engagement)
DAY-IN-THE-LIFE SCENARIO
CUSTOMER EMPATHY MAPPING
PERSONA PROFILE
CUSTOMER JOURNEY MAPPING
SERVICE BLUEPRINT
EXPERIENCE PROTOTYPING
QUICK & DIRTY PROTOTYPING
FAKE ADVERTISING
SURVEY / QUESTIONNAIRE
FOCUS GROUPS
1 ON 1 INTERVIEW
DESIGN ETHNOGRAPHY
SERVICE SAFARI
CO-DESIGN WORKSHOP
LEAD USER STUDY


Now, let's find the best method for you.
Select a level from 1 to 4 of any metric you wish to explore and see what methods suit you the most. You can use as many metrics as you need. Use the tool all the times you need until you find a method to go on with. Place the cursor on the metric's title to see the level's criteria. Press to select and press again to unselect.
Analyse & synthetize
(existing data)
Gather additional data
(from direct customer engagement)
Gather additional data
(without direct customer engagement)
OP Designer's point of view
1 2 3 4
Market Maturity
1 2 3 4
OP Designer's time availability
1 2 3 4
DAY-IN-THE-LIFE SCENARIO
CUSTOMER EMPATHY MAPPING
PERSONA PROFILE
CUSTOMER JOURNEY MAPPING
SERVICE BLUEPRINT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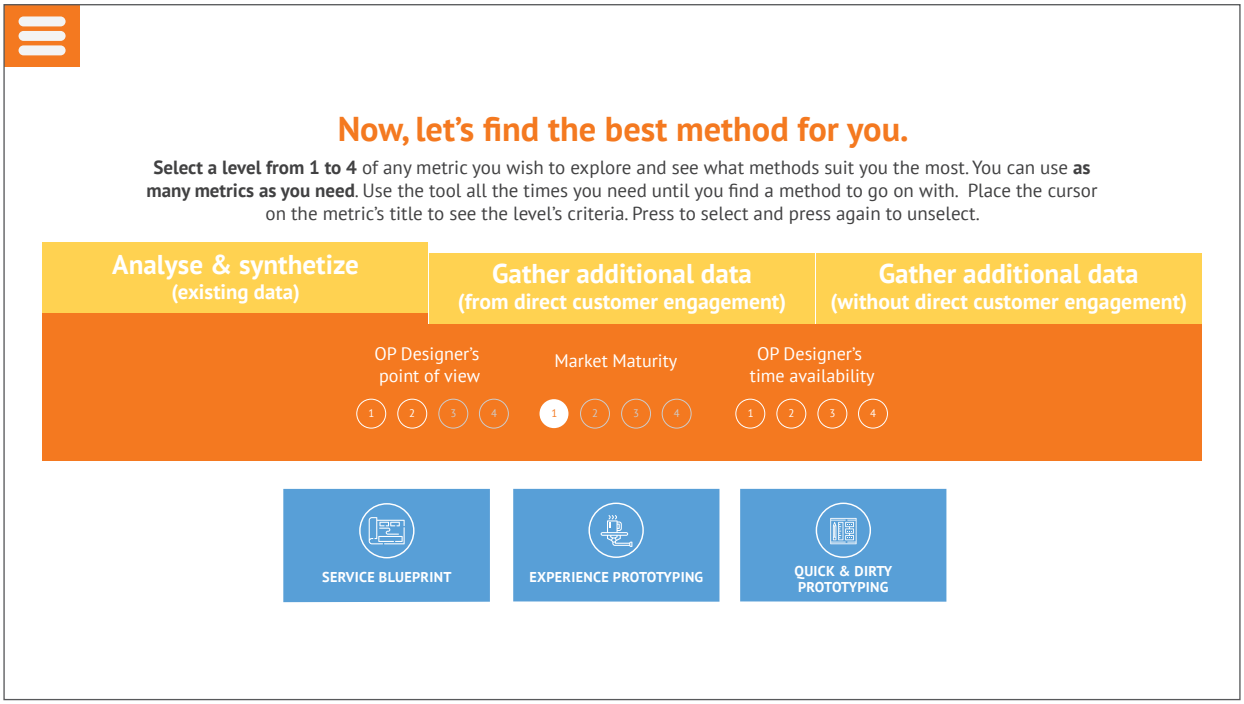
Analyse & synthetize
(existing data)
Gather additional data
(from direct customer engagement)
(1) Brand new idea, new market needed.
(4) Established market. Improve existing.
OP Designer's point of view
Market Maturity
OP Designer's time availability
1 2 3 4
DAY-IN-THE-LIFE SCENARIO
CUSTOMER EMPATHY MAPPING
PERSONA PROFILE
CUSTOMER JOURNEY MAPPING
SERVICE BLUEPRINT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Analyse & synthetize
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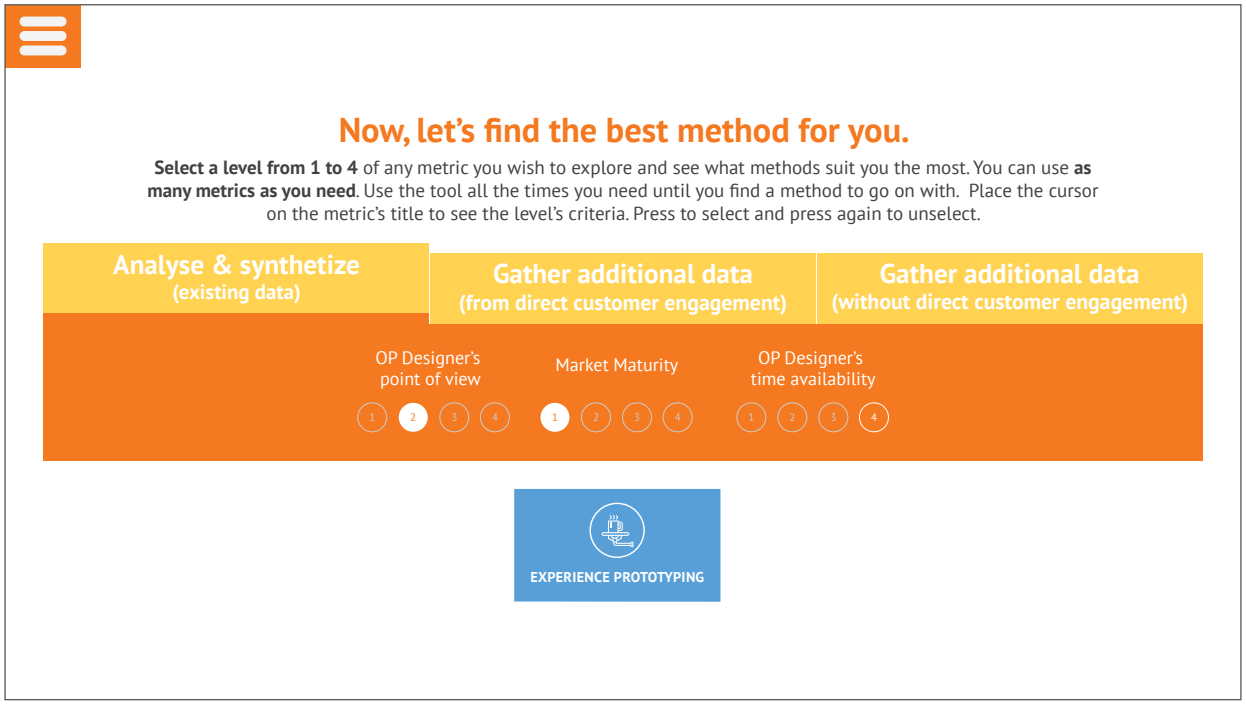
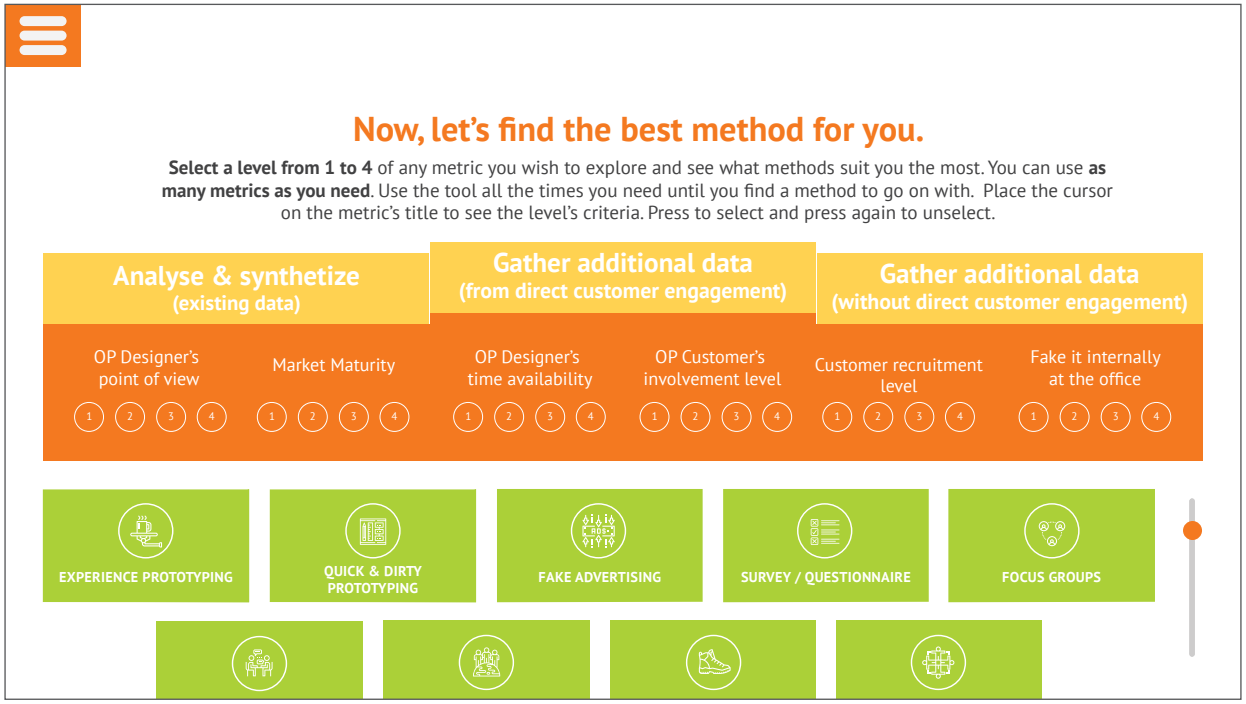
OP Designer's point of view
Market Maturity
OP Designer's time availability
1 2 3 4
SERVICE BLUEPRINT
EXPERIENCE PROTOTYPING
QUICK & DIRTY PROTOTYPING


Now, let's find the best method for you.
Select a level from 1 to 4 of any metric you wish to explore and see what methods suit you the most. You can use as many metrics as you need. Use the tool all the times you need until you find a method to go on with. Place the cursor on the metric's title to see the level's criteria. Press to select and press again to unselect.
Analyse & synthetize
(existing data)
Gather additional data
(from direct customer engagement)
Gather additional data
(without direct customer engagement)
OP Designer's point of view
1 2 3 4
Market Maturity
1 2 3 4
OP Designer's time availability
1 2 3 4
EXPERIENCE PROTOTYPING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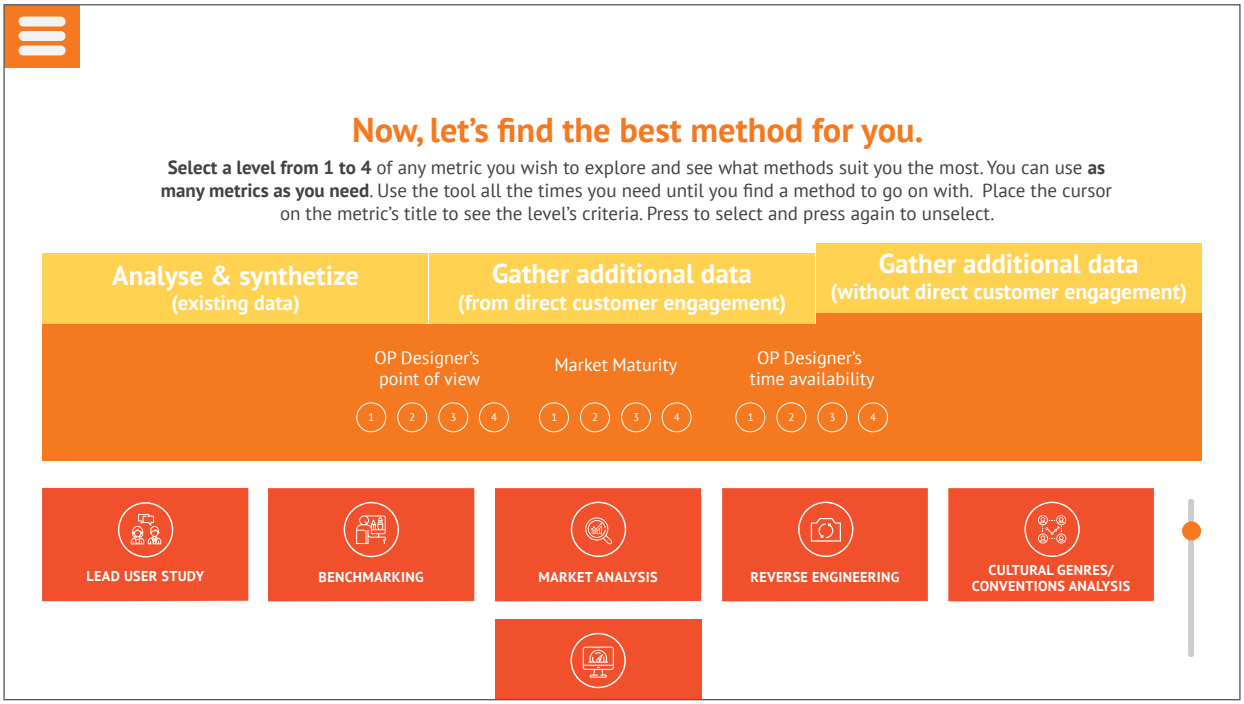
Analyse & synthetize
(existing data)
Gather additional data
(from direct customer engagement)
Gather additional data
(without direct customer engagement)
OP Designer's point of view
1 2 3 4
Market Maturity
1 2 3 4
OP Designer's time availability
1 2 3 4
OP Customer's involvement level
1 2 3 4
Customer recruitment level
1 2 3 4
Fake it internally at the office
1 2 3 4
EXPERIENCE PROTOTYPING
QUICK & DIRTY PROTOTYPING
FAKE ADVERTISING
SURVEY / QUESTIONNAIRE
FOCUS GROUPS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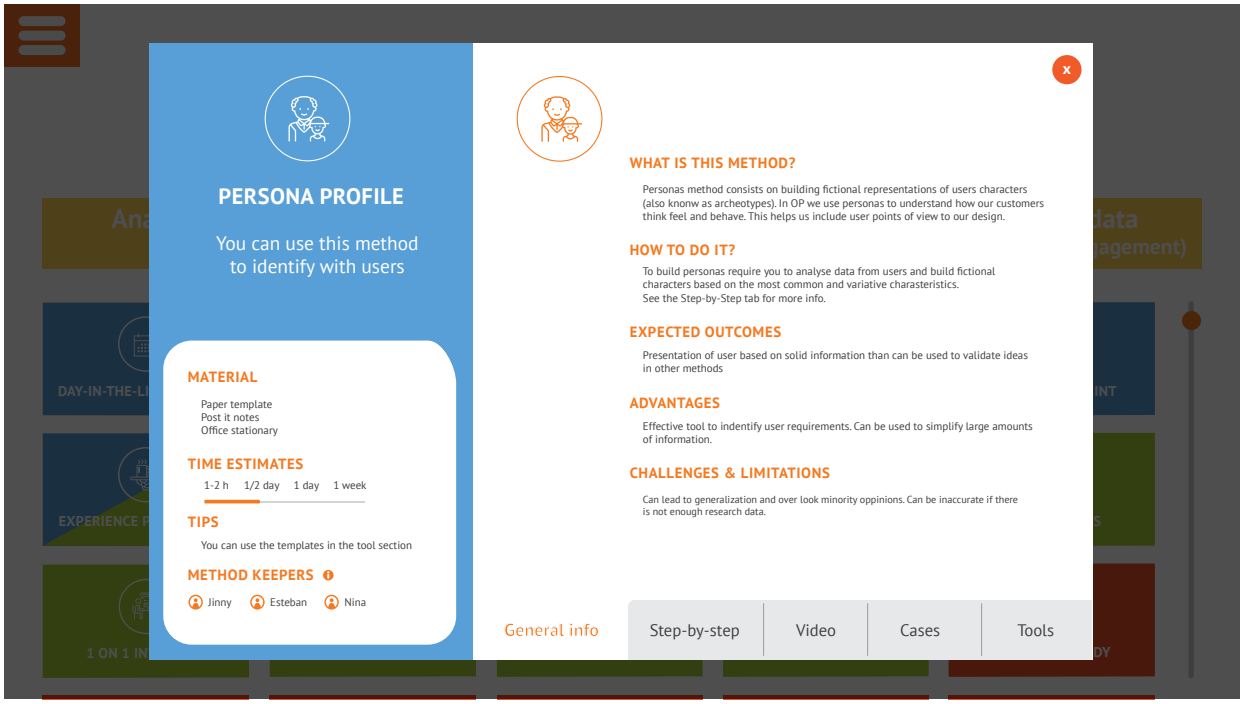
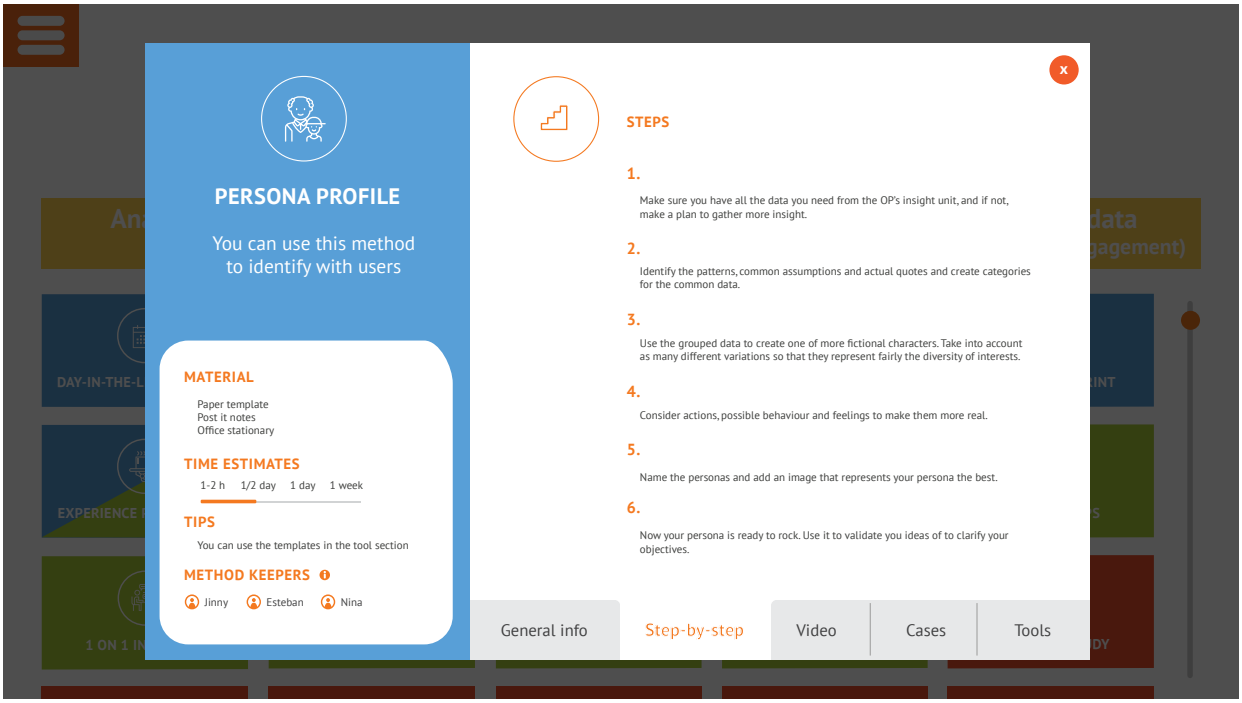
Gather additional data (from direct customer engagement)
Gather additional data (without direct customer engagement)
OP Designer's point of view
Market Maturity
OP Designer's time availability
1 2 3 4
LEAD USER STUDY
BENCHMARKING
MARKET ANALYSIS
REVERSE ENGINEERING
CULTURAL GENRES/ CONVENTIONS ANALYSIS


PERSONA PROFILE
You can use this method to identify with users
MATERIAL
Paper template
Post it notes
Office stationary
TIME ESTIMATES
1-2 h 1/2 day 1 day 1 week
TIPS
You can use the templates in the tool section
METHOD KEEPERS
Jinny Esteban Nina
WHAT IS THIS METHOD?
Personas method consists on building fictional representations of users characters (also knonw as archeotypes). In OP we use personas to understand how our customers think feel and behave. This helps us include user points of view to our design.
HOW TO DO IT?
To build personas require you to analyse data from users and build fictional characters based on the most common and variative charasteristics.
See the Step-by-Step tab for more info.
EXPECTED OUTCOMES
Presentation of user based on solid information than can be used to validate ideas in other methods
ADVANTAGES
Effective tool to indentify user requirements. Can be used to simplify large amounts of information.
CHALLENGES & LIMITATIONS
Can lead to generalization and over look minority oppinions. Can be inaccurate if there is not enough research data.
General info
Step-by-step
Video
Cases
Tools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MATERIAL
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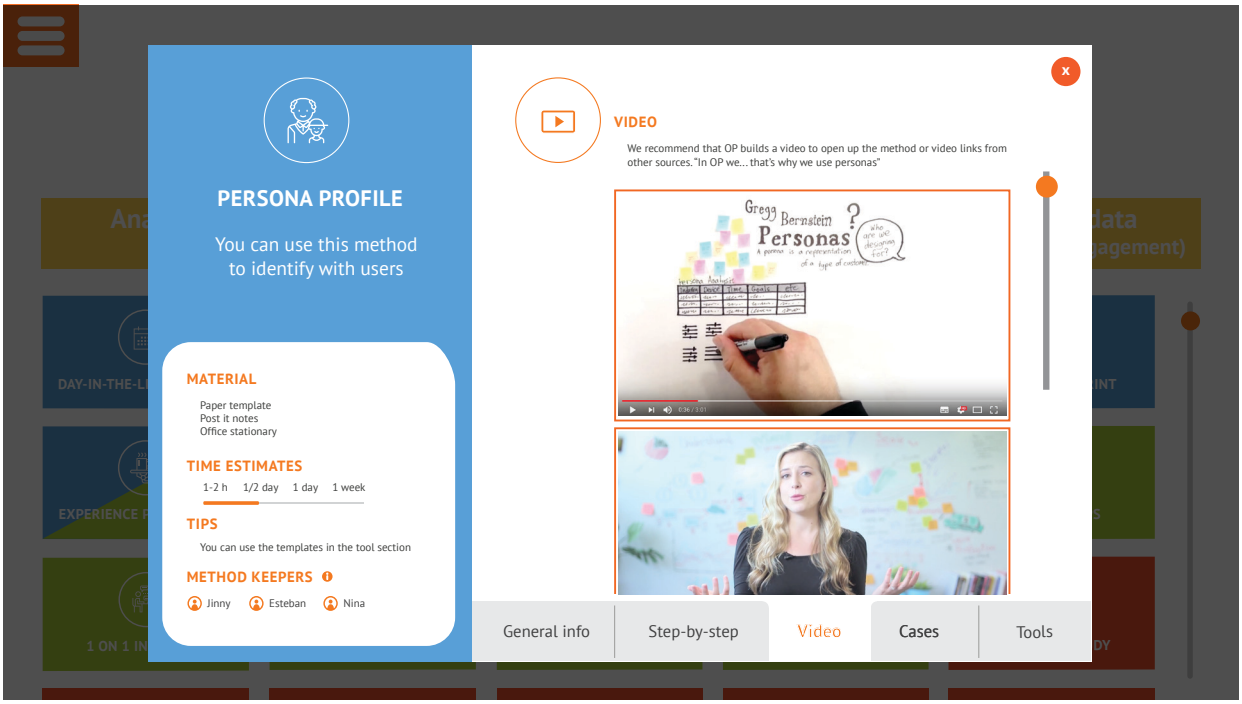
METHOD KEEPERS
Jinny Esteban Nina
STEPS
1.
Make sure you have all the data you need from the OP's insight unit, and if not, make a plan to gather more insight.
2.
Identify the patterns, common assumptions and actual quotes and create categories for the common data.
3.
Use the grouped data to create one of more fictional characters. Take into account as many different variations so that they represent fairly the diversity of interests.
4.
Consider actions, possible behaviour and feelings to make them more real.
5.
Name the personas and add an image that represents your persona the best.
6.
Now your persona is ready to rock. Use it to validate you ideas of to clarify your objectives.
General info
Step-by-step
Video
Cases
Tools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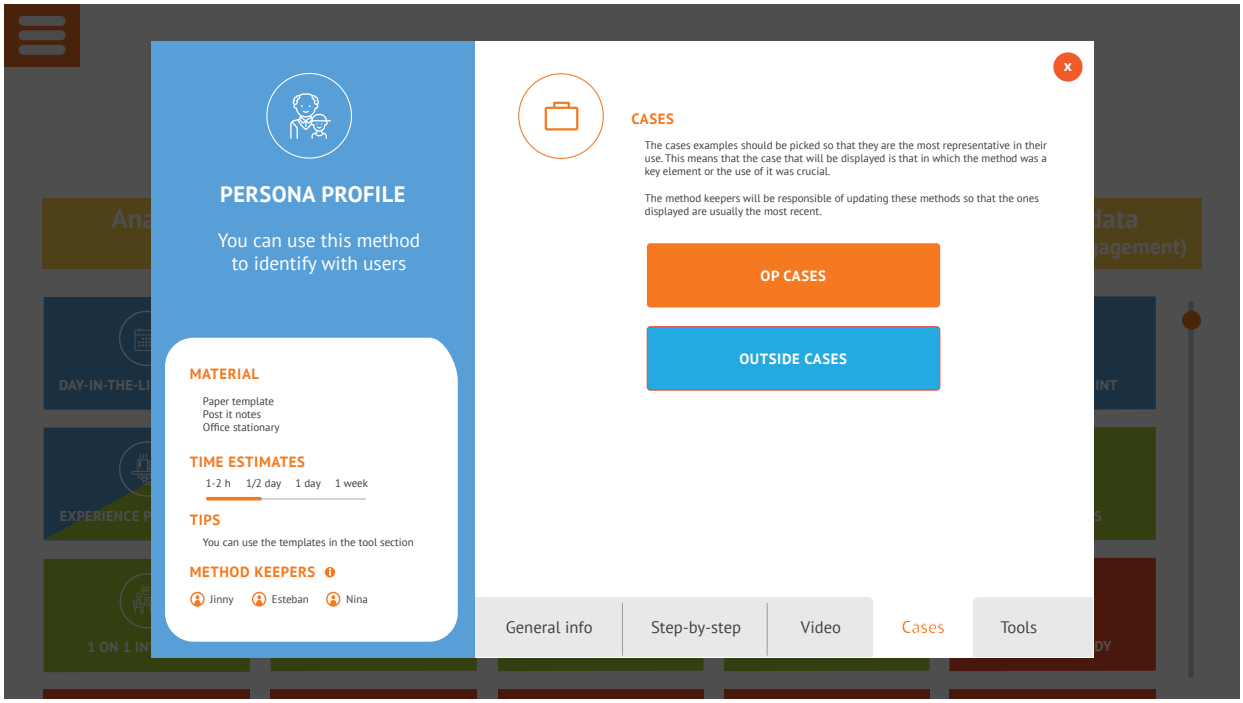
METHOD KEEPERS
Jinny Esteban Nina
VIDEO
We recommend that OP builds a video to open up the method or video links from other sources. "In OP we... that's why we use personas"
Gregg Bernstein
Personas
General info
Step-by-step
Video
Cases
Tools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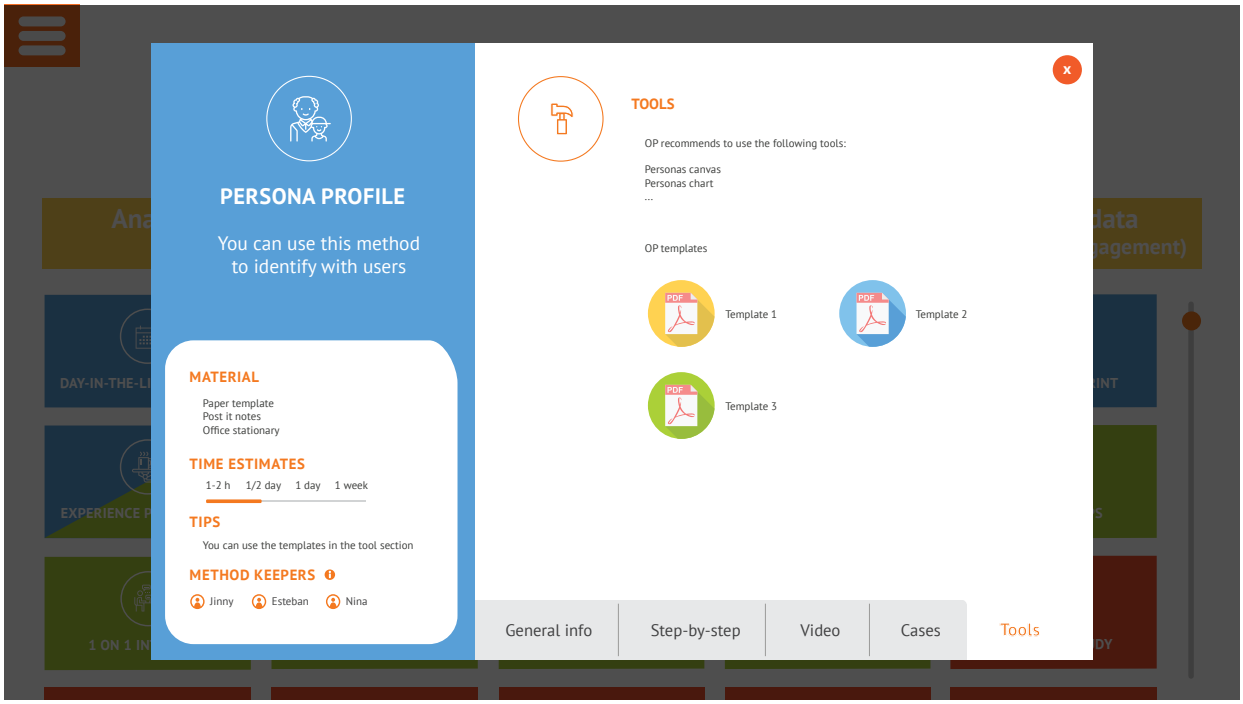
METHOD KEEPERS
Jinny Esteban Nina
CASES
The cases examples should be picked so that they are the most representative in their use. This means that the case that will be displayed is that in which the method was a key element or the use of it was crucial.
The method keepers will be responsible of updating these methods so that the ones displayed are usually the most recent.
OP CASES
OUTSIDE CASES
General info
Step-by-step
Video
Cases
Tools


PERSONA PROFILE
You can use this method to identify with users
MATERIAL
Paper template
Post it notes
Office stationary
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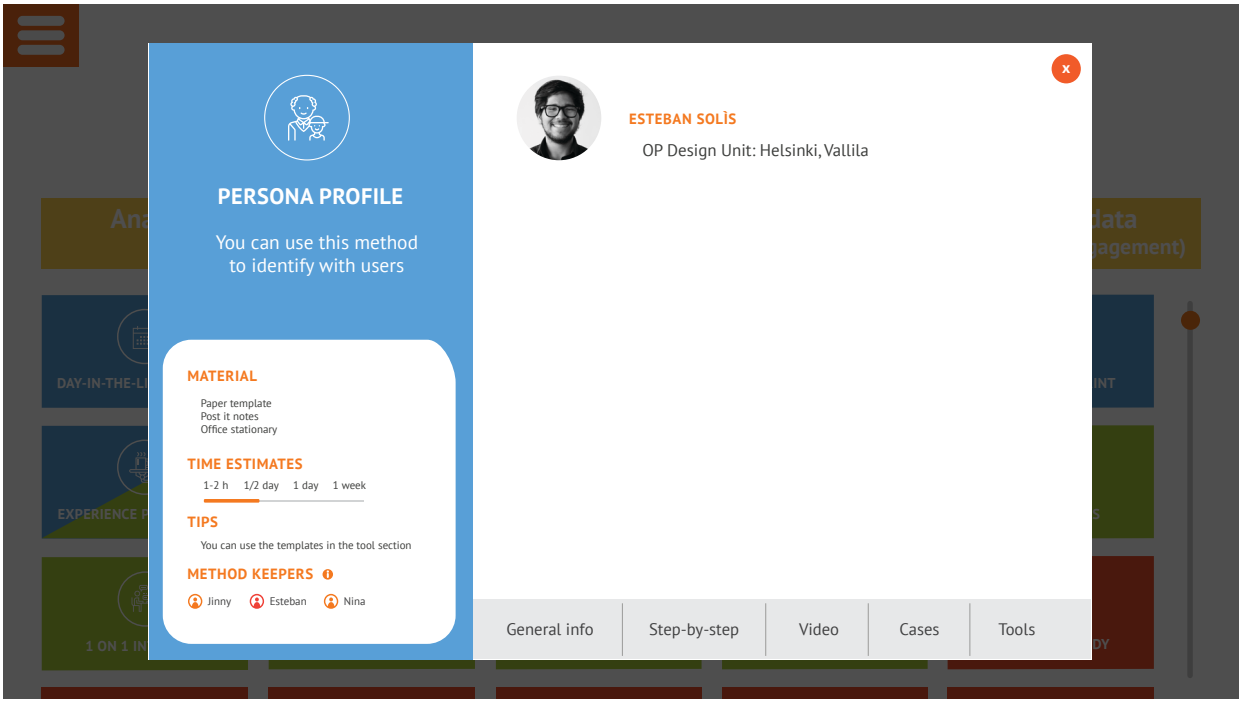
1-2 h 1/2 day 1 day 1 week
TIPS
You can use the templates in the tool section
METHOD KEEPERS
Jinny Esteban Nina
TOOLS
OP recommends to use the following tools:
Personas canvas
Personas chart
...
OP templates
Template 1
Template 2
Template 3
General info
Step-by-step
Video
Cases
Tools




# Got any questions or suggestions for the Pool?

If you have any **questions** or **suggestions** to improve the **Method Selection Pool**, we would be really interested to listen to them. Just leave your feeback in the **box** and we'll use it to improve.

**Every feedback is valuable** and will help OP develop a better tool for you.

**Thank you!**

**Name:**

**e-mail:**

**Question/Suggestion:**

**Send**