Know your business, know your users

Learn about your organization, the market and your stakeholders to give more power to your user findings

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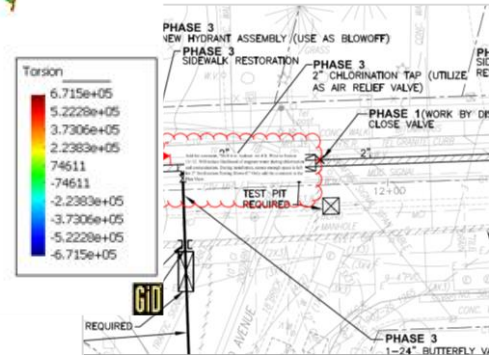
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About me

Currently at Rackspace

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Civil Engineer

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Music and literature

Not everyone seemed to agree that
Our finding was great

It seemed the business didn't want to listen to a key aspect of our customer's experience

Not an uncommon situation

- Looking at practical conditions often reveals larger, systematic shortcomings.

- Examples:
  - Data that showing that the value proposition could be different—the market may have changed over time
  - Research showing that the solution is hindering other work activities for users
  - Evidence that the solution provided is ineffective—for instance, products/services can be usable but far from adequate

How to change this?

- It's important to integrate this knowledge into the business
- We have found that three key aspects help us communicate with the larger set of business stakeholders
  - Business model
  - Market trends
  - Employees needs

Understanding our business

Solve a problem | Create a bureaucracy | Get value in return

Lean Canvas

Helps to synthesize and organize the main pieces of a business model. What is a business designed to do?

- Unique Value Proposition
- Solution
- Revenue Streams

These **interconnected** pieces are important because user pain points can have very different weights depending on revenue streams
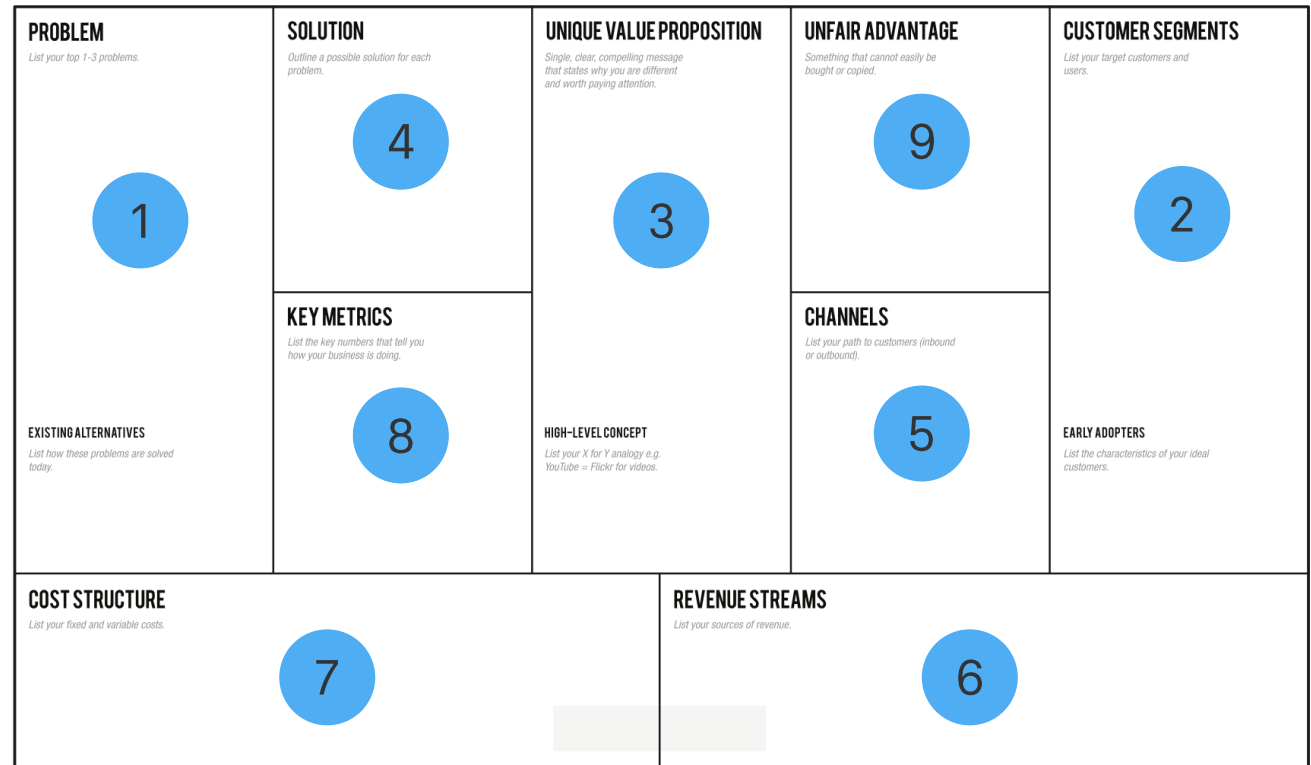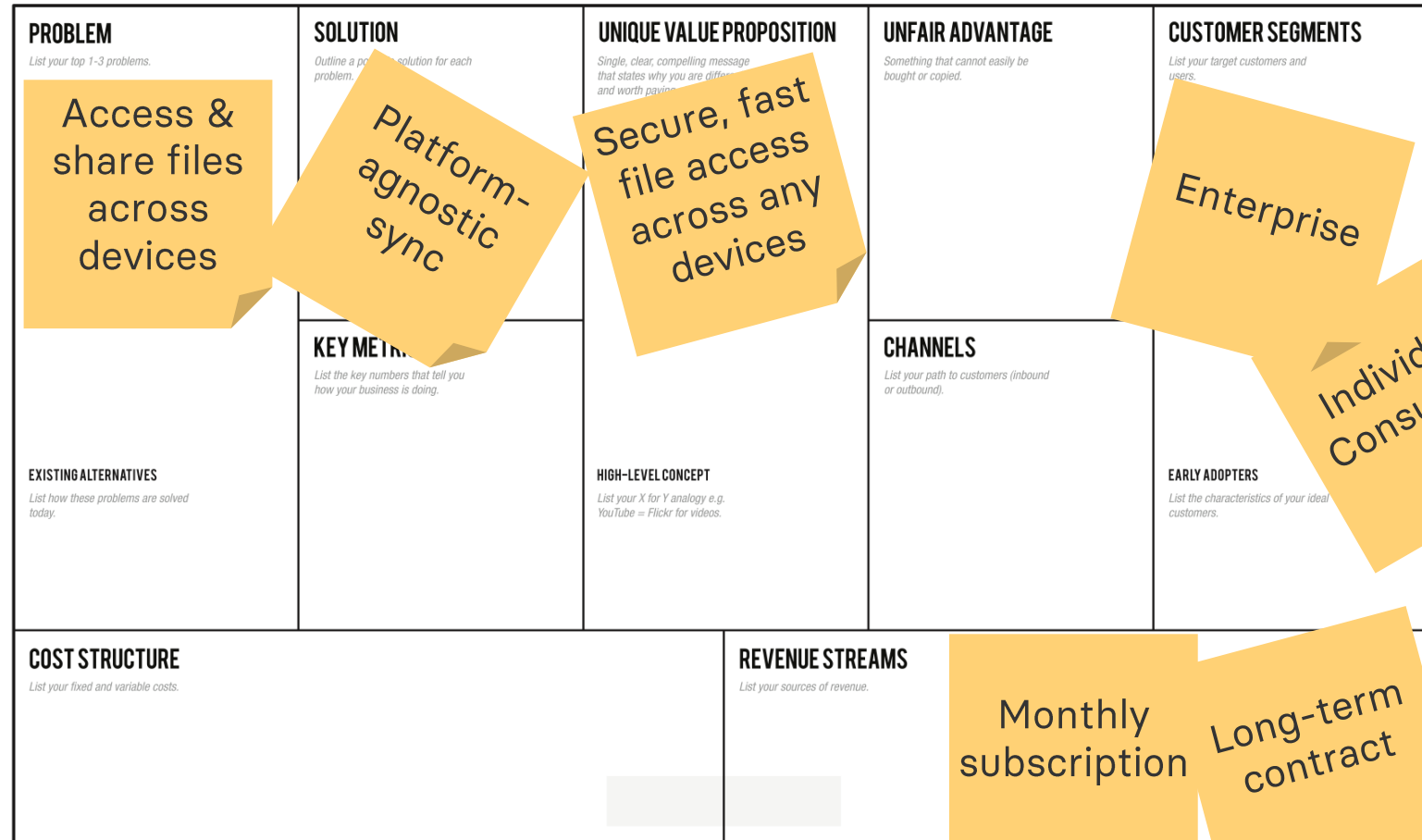
Example: Dropbox

Do users want to take a portion of their problems on their own?

Do users have a mix of solutions?

How do any of these pieces change the others?

Is it overwhelming or out of scope to make required changes? Too strategic?

PROBLEM
List your top 1-3 problems.

Access & share files across devices

SOLUTION
Outline a possible solution for each problem.

Platform-agnostic sync

KEY METRICS
List the key numbers that tell you how your business is doing.

UNIQUE VALUE PROPOSITION
Single, clear, compelling message that states why you are different and worth paying.

Secure, fast file access across any devices

HIGH-LEVEL CONCEPT
List your X for Y analogy e.g. YouTube = Flickr for videos.

UNFAIR ADVANTAGE
Something that cannot easily be bought or copied.

CHANNELS
List your path to customers (inbound or outbound).

CUSTOMER SEGMENTS
List your target customers and users.

Enterprise

Individual Consumers

EARLY ADOPTERS
List the characteristics of your ideal customers.

EXISTING ALTERNATIVES
List how these problems are solved today.

COST STRUCTURE
List your fixed and variable costs.

REVENUE STREAMS
List your sources of revenue.

Monthly subscription

Long-term contract

Is the user the same person who makes purchasing decisions?

Which segment brings higher revenue?

For how long do users have to cope with poor experiences?

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We've acquired: Business Context

- Understand the underlying system and its key dimensions:
  - Individual vs organizational consumers
  - Problems solved for each, and their differences
  - Terms of revenue
  - Channels for communicating, distributing

- Interrelated pieces open up more questions:
  - What else are consumers seeing, using?
  - What are competitors doing?
  - What are stakeholders' priorities?
 - What is most pressing to different units/departments inside the organization?

Understanding market trends

What happens outside the office walls?

Customer Lifecycle

Example: Lyft

- How do you decide to purchase?

- Is it first time or repeating purchase?

- Are you using an app, customer service, usage reports?

- Do you want to become a subscriber?

- Do you want to quit using this because of factors unrelated to the service? (e.g. how they manage their business)

Purchasing → Operations → Upgrade/Downgrade
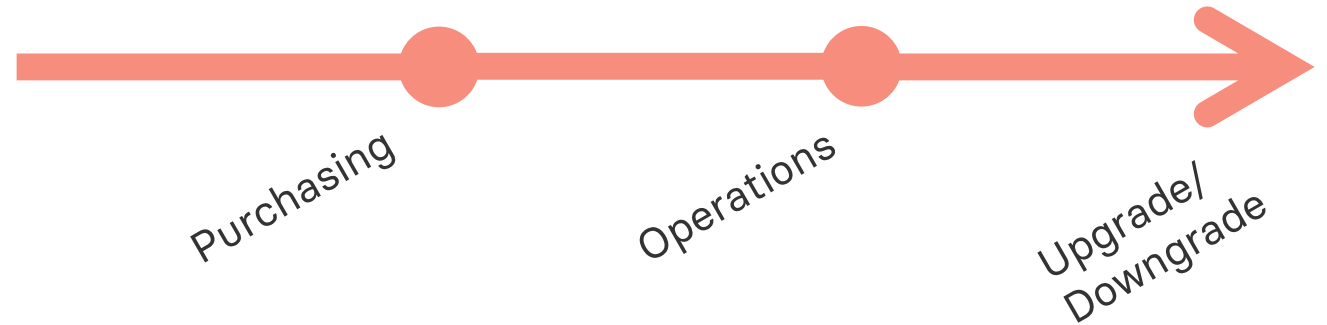
All are phases of <u>using</u> the solutions of the business

Where is it difficult to use the system?

What information is available to the public, users, and consumers to make these decisions or to select an alternative at various points?

What are customers looking at?

Customers are often re-evaluating their decisions on purchasing, operating, upgrading, downgrading

- Who are our competitors?
- What services do they offer?
- How do they talk about it?
- Which phase do they focus on?
- Which features do they offer?
- What are the larger trends of the market?
- What do people inside the organization hear about the market?

Market Intelligence

- Review
  - News
  - Industry Reports
  - Magazines and Blog Articles
  - Announcements
- Can be coded to obtain quantitative data
- Some of these follow a pay-for-play model, so consider that as part of the implications
- Leverage *big* names

- What does a review of news, reports, articles and announcements reveal?
- What are trends, patterns, themes?
- What needs do the offerings of competitors reveal?
- How can the organization leverage these trends through the current business model?

Market Perception & Trends

- Surveys
  - Leverage quantitative data to communicate internally
  - Communicate behavioral limitations
- Interviews
  - Enable deeper understanding of reasons behind pain points, trends, needs
  - Expand on characteristics of segments

- What are consumers' priorities?
- Where do users spend their time?
- What are their perceived needs
- What drives them to use your product?
- What are common problems when using services like yours?
- Which mix of services do they use?

Context acquired: Market Trends

- Understand what customers see, their priorities, and which alternatives they have to your products and services

- How does that misunderstood finding relate to this data?
- Does it impact one or more phases of the lifecycle?
- Are there any trends about that phase that enrich the user data?
- Identify opportunities to innovate, perceptions change
- Satisfy or raise awareness of the perceptions, expectations at different phases of the larger experience

# Understanding internal users

What's going on in here?

Employees ARE users

They need help to consume information

Business Intent

Example: Domino's

- Which products to add/remove from menu?

- Which combos should be introduced?

- Should there be profiles for mobile orders or just in-app orders?

- How and when to increase communications with customers?

- How to adjust for local specials?

- How to increase flexibility of floor jobs?
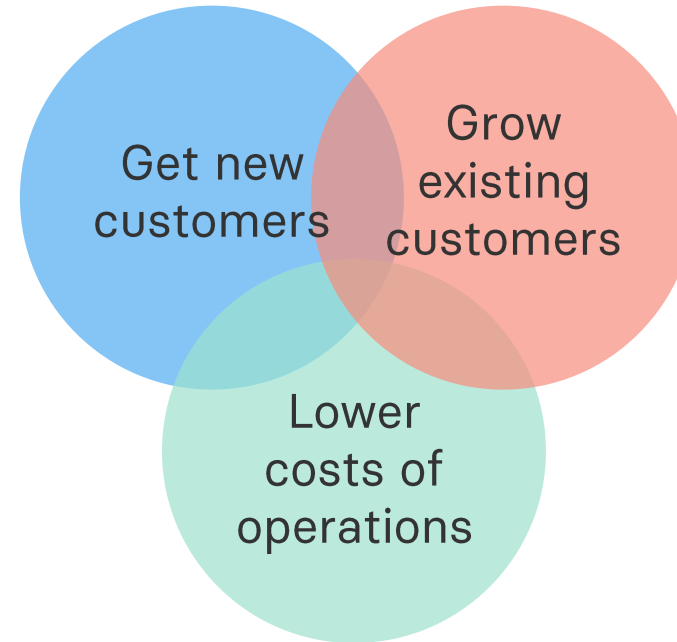
What are colleagues looking at?

Members of an organization are trying to attain the goals of their jobs, inside their departments and business units

- Not everyone is looking at the same picture even if everyone is trying to contribute to the same ultimate goal
- Some overlap, but there will be tradeoffs, especially as it comes to prioritizing the work to be done
- Roughly related to the Customer Lifecycle

Getting the business' perspective

Systematic approaches

- Do a formal round of interviews

- Always ask the same questions up front when doing intakes

- Browse through data and documentation

What to look for?

- Similar questions to those for customers
  - Importance of features
  - Relevant competitors
  - Expectations of what will change

- What are systematic pain points?

- When have priorities shifted and how did such change occur?

- How are databases organized?

Group Activity!

Group Activity

- Think of a research finding that is not being acted upon as you think it should. Discuss where it has more impact:

A. Getting new customers

B. Growing existing ones

C. Lowering cost

- Further discussion:
  - Who would take action on it?
  - What are alternatives for customers?
  - If this changed, what else do you think would change inside your business?

What changes?

Enrich your findings

- Better present the implications of your findings
  - Towards the business
  - In the market
  - Inside the organization
- Bring data to your reports
- Reiterate the message!

Summary

Through three heuristic approaches we can locate user data within the larger context of the business:

1. Business model to understand key business variables

2. Market data to understand what else customers have access to

3. Internal data to understand what colleagues' priorities are

Thank you!

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