Advancing Research 2023
by Rosenfeld

@advancing resrch #AR2023
27 March 2023

curated by **VICTOR UDOEWA**
Chief Experience Officer & Service Design Lead, **NASA**

SELECTED BEFORE the ADVENT of OUR CURRENT ECONOMIC SITUATION, esp. in Technology sector

WELCOME!

Listen
Learn
Laugh

Enjoy!

It's really wonderful to see such a burgeoning **COMMUNITY** of researchers willing to **LEARN TOGETHER** and **GROW** alongside one another.

Change can only be achieved when we **raise up the voices of all** — in and outside our walls. Today we will examine **new ideas and practices** from researchers like you who have made research more **ethical** and **inclusive**. And we will challenge ourselves to take a good, hard look in the mirror to see what we — as individual researchers and as a community — need to do to **continue pushing for equitable change**.

IN TIMES OF GREAT UPHEAVAL & CHANGE

INDUSTRY
GROUP/ORGANIZATION
INDIVIDUAL

TRANS — **FORM** — **ATION** →

Possibilities ARE MORE ALIVE

OUR AWARENESS and CONSCIOUSNESS INCREASES

We're going to be exploring different types of change...

CONVERSING
CONVERSION
CONVERT

with or alongside   to bend or turn

CHALLENGE·YOURSELF
Stay open, get engaged...

WHEN DIFFERENCE COMES TOGETHER

FOR **WHAT COULD BE**...

by practicing transformation as a way of life it will be SO much easier to practice **RESEARCH as TRANSFORMATION**

Together we will travel a road that bends and turns in a direction I would not have traveled alone.

Why I Left UX Research: Lessons Learned

What IS the makeup of people doing this work?

DR. LISANNE NORMAN
Co-Director of DEI, The Hotchkiss School

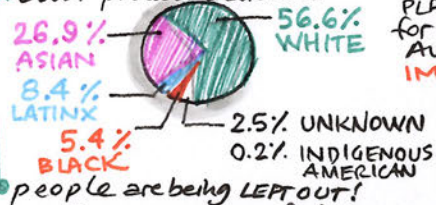Thank you, Rosenfeld Media REFLECTING ON MY PERSONAL STORY, I NOTICED SOME PATTERNS and TRENDS ALONG WITH WAYS WE CAN TRANSFORM OUR FIELD...

Good morning, good afternoon everybody. It's really such a pleasure to be here today. I'm excited that I get the opportunity for us to gather so we can discuss DIVERSE PRACTITIONERS, PERSPECTIVES, APPROACHES, and PROCESSES that I believe are VITAL to the CONTINUED GROWTH & DEVELOPMENT of this field.

STATS: P.O.C. in UX RESEARCH

If we're not being inclusive about product decisions

- 26.9% ASIAN
- 8.4% LATINX
- 5.4% BLACK
- 56.6% WHITE
- 2.5% UNKNOWN
- 0.2% INDIGENOUS AMERICAN

people are being LEFT OUT!

Also: COMMUNITY
BLACK UX AUSTIN formed
IT WAS AN EXCITING TIME but RACISM and GROSS PAY INEQUITY KILLED IT for ME [See video for full details]

I WAS THE ONLY BLACK EMPLOYEE

JOINED TO HELP BUILD E-COMMERCE PLATFORM for DIVERSE AUDIENCE IMPACT!

Entry into the STARTUP WORLD Sounded promising!
- CULTURE OF INNOVATION
- FAST GROWTH
- SMALLER TEAMS
- SCALABLE/FLEXIBLE etc.

NO

Heartbreaking... lots of MICROAGGRESSION, ISOLATION, CULTURES OF FAVORITISM, POOR MGMT. NO DIVERSITY HIRING

I DID IT for a while!

STRONG EMPLOYEE RESOURCE GROUP BUILDING DESIGN CULTURE GREAT OPPORTUNITY! DIRECTOR of UX RESEARCH

RECRUITED BY VISA

Bliss SLIGHTLY FADES
- Past CONSULTING WORK for DELL LED TO AN OFFER
- INTERESTED in BEING HANDS-ON for IMPLEMENTATION
- NEW to WORKING w/ DESIGN TEAM, PRODUCT MANAGERS
- EXCITED to LEARN NEW METHODS

NOTICED...
- A lot of chauvinism in dept. and on my team
- 90% of LARGE team was white and overwhelmingly MALE
- OTHER BLACK/BROWN PEOPLE ELSEWHERE in COMPANY (GOOD)
- PROVEN PAST EXPERIENCE MEANT BIG ASSIGNMENTS *Confidence in work*
  - No clear career path, even with managers, other researchers
  - No mentorship
  - Team composition not diversifying

UX RESEARCH Bliss
- DISCOVERED the FIELD in SUMMER 2015 - personal pivot away from teaching
- FORTUNATE to FIND WORK with CONSULTING FIRM (TECH CLIENTS) LED BY TWO FEMALE V.P.s
- LEARNED ON the JOB, WAS GIVEN A TEAM, HAD MAJOR PROJECTS and FULL SUPPORT
- NEW IDEAS WELCOME; WORK HAD IMPACT. ♥ BEST JOB EVER!
- FEMALE V.P.s LEFT, PROJECT ENDED, TEAM DISBANDED (~1 YEAR LATER) SO I LEFT.

what next...?

WE NEED ALLIES and CO-CONSPIRATORS
USE YOUR PRIVILEGE
Be active and INTENTIONAL

What would make me come back?

- HIRE and RETAIN MORE P.O.C. RE-SEARCHERS and OTHER UNDER-REPRESENTED GROUPS
  Spend the # to access recruiting platforms for P.O.C. in tech, i.e., POCIT
  👁 LINK IN RESOURCE DOC.

- TAKE SERIOUSLY the INFORMATION and RECOMMENDATIONS from EXISTING RE-SEARCH ABOUT WHAT P.O.C.s NEED to THRIVE in the WORKPLACE, SPECIFICALLY in TECH
  Create support mechanisms: MENTORSHIP and CAREER PATHS

- CONDUCT MORE STUDIES on the EXPERIENCE of UXRs WHO ARE P.O.C. and OTHER UNDERREPRESENTED GROUPS
  We are researchers LET'S DO SOME RESEARCH

- PROVIDE CONSISTENT and CONTINUAL BIAS TRAINING

- PROVIDE MANAGERIAL TRAINING with a FOCUS on EMPOWERING a DIVERSE TEAM

- TIE DIVERSITY, EQUITY, INCLUSION, and BELONGING (DEIB) GOALS to ANNUAL REVIEWS and BONUSES

ALSO: I WAS the MEETING NOTETAKER and GOT GASLIGHTED ABOUT MY IDEAS CONSTANTLY

The Dangers of Empathy: Toward More Responsible Design Research

We want to recognize the limits, start conversations, and address these limits together.

CASSINI NAZIR
Assistant Professor

MEAH LIN
Graduate Student, Interaction Design

— University of North Texas —

EMPATHY*

- HELPS US TAKE OTHER PERSPECTIVES
- IDENTIFY with PEOPLE
- UNDERSTAND THEIR EMOTIONS
- BUILD RAPPORT
- POSSIBLY the BASIS for HUMAN MORALS
- WAY TO SHOW CARE & CONCERN
- DON'T EXERCISE IT ENOUGH
- IMPORTANT for DESIGNERS

It's not **BAD**... but neither is it all **GOOD**

"We should not fool ourselves into thinking we can get into their heads."
— DON NORMAN (2019)

* there is no consensus on the definition of the word (WHICH IS FINE **BUT** WHEN THERE IS A MisMatch BETWEEN the WAY A WORD IS **Researched** and **Practiced** there's confusion)

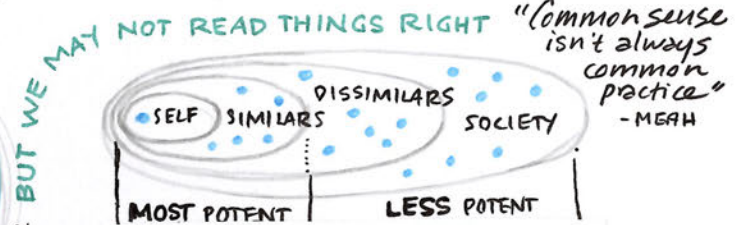**EMPATHY'S POWER** is that it allows us to view a situation from multiple **PERSPECTIVES**

TIP: Iterate on approaches and artifacts that best serve your research needs **SEE CASE STUDIES!**

Thinking about **COGNITIVE EMPATHY**
mentalizing
understand others and better communicate

Caring about **EMPATHIC CONCERN**
compassion
helps us take action

Sharing **EMOTIONAL EMPATHY**
experience sharing (may include personal distress)
builds connections

Imitating **MOTOR EMPATHY**
mirror body position
mimic language and tone
gateway to other empathies

THESE ARE ELASTIC... depending on the situation

A RELATIONAL WEB of INFORMATION THAT OTHERS HAVE SPUN

FEELINGS
THOUGHTS
INFORMATION
EXPERIENCES
ATTITUDES
SIGNIFICANCE
MEANING

SELF
asymptotic
NEVER TOUCHES
OTHERS

This leaves things open to misunderstanding and misinterpretation

Feeling what others feel has a reciprocal effect on **US**. EMOTIONAL CAN LEAD to AVOIDANCE, & CONCERN for BURNOUT

"...BUT WE MAY NOT READ THINGS RIGHT"

"Common sense isn't always common practice" — MEAH

SELF   SIMILARS   DISSIMILARS   SOCIETY

MOST POTENT   LESS POTENT

WE KNOW of (16) LIMITATIONS
→ See Resource Guide for details

Example: We SPOTLIGHT EMPATHY on whom we choose, leading to INSENSITIVITY to others
(myopic)

Neurotypical and neurodivergent EMPATHY are expressed differently [SEE VIDEO for DETAILS]

DESIGN THINKING is neurotypical; largely Western values, morals, and expectations

Empathy can provide an illusion of understanding
sometimes leading us to ask fewer questions ⚠️

PRACTICAL CASE STUDIES

1 ASTRO1 MISSION
FOUND **FOUR** LIMITATIONS
Illusion of understanding = GAPS in KNOWLEDGE... lead to FALSE ASSUMPTIONS

2 UK MINISTRY of JUSTICE
Stereotypes
Archetypes in creation of personas
REMOVED ATTRIBUTES to avoid side-taking and divisiveness

3 UNDELIVERABLES
Clinton Carlson designing for microcommunities
- GENERATIVE
- COMMUNITY-ACTIVATED
- BOTTOM-UP APPROACH

The Politics of Radical Research: From Extraction to Collective Liberation

THIS IS A CRITICAL CONVERSATION, AS WE CAN BENEFIT FROM <u>and</u> BE HARMED BY the SAME SYSTEMS

REFLECT ON HARM REDUCTION and TRAUMA-CENTERED PRACTICES

SAHIBZADA MAYED
Liberatory, Emancipatory, and Visionary Experience Designer

Welcome

In this portal of the pluriverse, we engage in collective sense-making. We are not here to learn answers, rather we seek to explore the complexities and messy entanglements that emerge from our shared visions of moving toward less extractive, decolonial, and liberating outcomes for research.

EMPATHY is a baseline <u>not</u> an END GOAL
"If you walk in someone else's shoes, then you've taken their shoes."
—WENDY HUI KYONG CHUN

Situating Ourselves

Everything has MULTIPLICITY
So we need to grasp complexity
Move away from simplistic, binary forms of thinking

"The true focus of revolutionary change is never merely the oppressive situations which we seek to escape, but that **piece of the oppressor that lives in all of us.**" AUDRE LORDE

IN WHAT WAYS ARE WE COMPLICIT IN REPRODUCING HARM and SOCIAL INEQUITIES? How to position our role in participation in harmful/oppressive systems?

AT WHAT and WHOSE COST DO WE ENGAGE in RESEARCH? WE RARELY EXAMINE THE HUMAN COST OF THE WORK

HOW DO WE UNDERSTAND OUR ROLE AS RESEARCHERS and DESIGNERS AND CONSIDER THE IMPACT OF OUR WORK?

WHAT ARE WE PRETENDING NOT TO KNOW? (attributed to Toni Cade Bambara)
what are we neglecting that's right in front of us?

This whole talk topic is a <u>lot</u>! Let's take a moment to pause and reflect.
- WHAT EMOTIONS ARE COMING UP FOR YOU?
- WHERE ARE THOSE EMOTIONS IN YOUR BODY?
- HOW ARE YOU RESPONDING TO THEM?

KEEP the CONVERSATION GOING
▶ bit.ly/radicalresearch2023

Deconstructing the Money Pipeline

Compensation CRITICAL to RESEARCH

YET

We often feel ENTITLED to people's insights for that specific time
- WE HAVE NO RIGHT TO EXTRACT A PERSON'S LIVED EXPERIENCE
- WHAT THEY SHARE SHOULD BE SEEN AS A GIFT

What does FAIR, GENEROUS RESEARCH look like? ... in terms of RECIPROCITY?

Clients/Customers/Employers (FUNDING SOURCES)
Align with those who reflect your own values
- PLAYS A CRITICAL ROLE IN REPRODUCING SYSTEMIC HARM & INEQUITIES

What role does **TIME** play as a FORM of CURRENCY in contributing to extractive methods? WE USE TIME PRESSURE AS AN EXCUSE TO NOT CHANGE OUR METHODS and TO RESIST BROADER CHANGES

This is not a MINING OPERATION
Research feels extractive Don't engage in insight mining
- CAN BE USED AS SOCIAL CONTROL & DOMINATION

YOU MIGHT BE LOOKING FOR A GOLDEN QUOTE FOR A SLIDE DECK BUT THERE IS A WHOLE PERSON BEHIND IT, AN ENTIRE LIFE, and MORE.

WHAT RIGHT DO WE HAVE?

- DIFFERENTIATE BETWEEN A RIGHT AND AN ENTITLEMENT Parse the feelings that arise
- UNDERSTAND ACCESS and PRIVILEGE Who gets to engage in research and who is taken seriously as a researcher
- BALANCE THE SCALE BETWEEN RIGHT and RESPONSIBILITY Whether you have the right or not, you have the RESPONSIBILITY

Who has the tools and resources... usually has access to decision-making and large-scale community impact
Systemic biases and inequities; the 'right' to engage in the work

OTHERS LAND WE INHABIT THE PLANET

What if I refuse to participate?
- You have a choice AGENCY & CONTROL
- Remaining silent is a choice

NOTE: The talk goes deeper into rights and engagement scenarios

Theme 1: Research as a Transformational Force *curated by Victor Udoewa*

Fast and Fearless Inclusive Research

Well... not that fast, and not entirely fearless
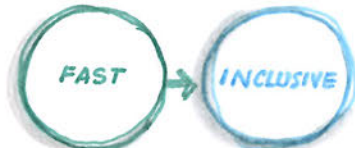
these stem from the fallacy of a DEFAULT OPTION

KAITLIN TASKER
Senior User Researcher, Teladoc Health
WITH Bo Wang and Leah Isquith-Dicker

Kaitlin opens the talk with numerous examples of unintended risks/harms – in many domains

Kaitlin closes the talk with a real-world case study

FAST → INCLUSIVE

Whomever...
- WE CAN TALK TO
- IS EASIEST TO TALK TO
- WE HEAR FROM MOST

Who...
- WE NEED TO LISTEN TO
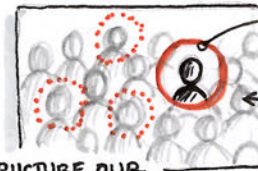- IS MISSING
- BEARS the GREATEST RISK

In our jobs, time and resources are limited ... the opposite of deliberate, inclusive work.

THESE PRESSURES ARE NOT BENIGN; THEY AFFECT WHO and WHAT WE WORK WITH

UX RESEARCHERS LEARN ABOUT BIAS, BUT MAY USE DEFAULT ASSUMPTIONS UNDER PRESSURE *lacking inclusivity*

TO GET HERE We need a new **frame**

A STRUCTURE OUR BRAINS USE TO PROCESS NEW INFORMATION AND CONNECT IT TO WHAT WE THINK WE ALREADY KNOW

Directs where we look, helps us interpret what we see

Also directs what we don't see

SO, HOW CAN WE CHANGE OUR FRAME?

A strong foundation exists...
(SEE SLIDES, VIDEO, RESOURCE GUIDE)
we must work to overcome long-held gaps.
- FRAMES are BEST WHEN *ITERATIVE*
- INSIGHT & LEARNING REQUIRE SPACE
- WE ARE FEEDING MULTIPLE BIRDS WITH ONE HAND

HOW
- ... to DECIDE who to include
- ... to CARVE SPACE to do so
- ... to CREATE your frame

Questions to ask ON YOUR OWN or WITHIN INDUSTRY

- HISTORICAL and STRUCTURAL
  Who do we need to listen to?
- ORGANIZATIONAL
  How can we carve out the space to do so?
  (SEE SLIDES, VIDEO for DETAILED QUESTION LIST)
- PERSONAL
  Who else do we need to involve in this work (and how)?

THERE ARE *multiple* WAYS TO DO THIS
— SEE RESOURCES PAGE —

MAIN KEY STEPS
1. SET A LEARNING TONE for THE TEAM
2. HAVE THEM IDENTIFY PERSONAL CONTEXT for EACH CATEGORY
3. AGGREGATE RESPONSES
4. REFLECT and DISCUSS w/ the GROUP
5. EXPLICITLY IDENTIFY OVERLAPS
6. EXPLICITLY IDENTIFY MISSING PERSPECTIVES

Exercise

Who are we? What is our lens?

Acknowledge our **POSITIONALITY**

Understand Relevant **MARGINALIZATION & INTERSECTIONALITY**

Personal and Team Bias

WHERE WE HAVE REPRESENTATION + WHERE IT IS LACKING =

Identify **KEY GAPS** for Next Steps

Harm Reduction

Who is doing the research and **who will be the focus**

IF WE NEED TO BRING IN MORE DIVERSE PERSPECTIVES

GOAL IS TO SEE WHERE PEOPLE ARE and RECKON WITH IT

Historical, structural, systemic biases

Who might face the greatest risk from this work?

In what ways might we inadvertently further colonialist, extractionist, and/or white supremacist practices IF WE AREN'T CAREFUL?

HOW IS THE TEAM LENS DIFFERENT?
HMW CENTER the EXPERTISE of PARTICIPANTS?
WHAT METHODS? WHAT PARTNERSHIPS?

ADJUST YOUR PLAN
- EXPAND STAKEHOLDER GROUP
- CONTACT OUTSIDE EXPERTS
- CONDUCT ADDITIONAL BACKGROUND RESEARCH

ADJUST
- INVOLVE OTHER PERSPECTIVES
- OVERALL PROCESS INVOLVEMENT THROUGHOUT See Sarah Fatallah's TALK & framework!

HOW YOU DO THIS WILL DEPEND ON...
- WHAT YOU KNOW
- WHAT YOU KNOW YOU DON'T KNOW
- WHAT FALLS THROUGH the CRACKS

WHO HAS BEEN HISTORICALLY EXCLUDED? + WHO MIGHT WE ENDANGER IF WE MIS-UNDERSTAND? = WHO WE NEED TO FOCUS ON

MAIN KEY STEPS
1. SET A LEARNING TONE for THE TEAM
2. GATHER the GROUP'S FOCUS ON THE SPECIFIC RESEARCH QUESTION
3. CONSIDER the HISTORICAL & STRUCTURAL FACTORS
4. TEAM DOCUMENTS KEY FOCUS AREAS + ANY for MORE INFO.
5. SEEK ANY MISSING INFORMATION
6. IDENTIFY KEY INTER-SECTIONS TO FOCUS

FOCUS YOUR RESEARCH RECRUITMENT
Key areas of marginalization; participants who embody multiple components

Theme 1: Research as a Transformational Force *curated by Victor Udoewa*

A Cultural Approach: Research in the Context of Glocalization

most successful when bi-directional influence of __culture__ is considered

HOW WE SEE the WORLD; A "STICKY" VIEW that CAN BE ADJUSTED and MODIFIED

The practice of conducting business according to both local and global considerations

As RESEARCHERS, WE are PIONEERS of **PROGRESS** in an era of RAPID GLOBAL CHANGE

which has both BENEFITS & COSTS

WE HAVE the ABILITY to FREE OURSELVES FROM PAROCHIALISM; RESPECT NUANCES of REGIONAL MARKETS to HELP **BUILD** the **FUTURE** **together**

IN a GLOBAL CONTEXT, OPENNESS occurs through RELATIONSHIPS and UNDERSTANDING CULTURAL CONTEXT(S).

I believe opportunity lies in g-localization [SEE LINKS in RESOURCES]

CHLOE AMOS-EDKINS *background in physical product design*
Research Director, **Studio intO** (United Kingdom)
@ we_are_into
REMOTE-FIRST, NETWORKED INNOVATION AGENCY

delivery of:
- design research
- insights
- innovation products

G-LOCAL CULTURES are dynamic so a cultural approach is needed

A FOCUS on the CENTRAL ROLE that CONSTRUCTIONS of MEANING PLAY in UNDERSTANDING and SHAPING SOCIAL PHENOMENA.
ROOTED in CULTURAL SOCIOLOGY

INCLUSIVE — MINIMIZING the EQUITY DIVIDE — ALL VIEWS INCLUDED

1 WORLDWIDE and UP-CLOSE
UBER in CAIRO

focus on digital equity
global tech application in GHANA

2 INSIDERS and OUTSIDERS
Women's fitness tech band in SAUDI ARABIA

Global/Local = World/Living Room

Reach local consumers in most relevant ways possible

Combine perspectives: macro trends with ethnographic viewpoints

SPOT WHERE THEY INTERSECT
We recruited aspiring and veteran drivers in region
→ ETHNO INTERVIEWS
→ LONGITUDINAL STUDY

Insights
- BUSINESS GROUPS OF DRIVERS SHARING SINGLE VEHICLE ACROSS SHIFTS
- ENGLISH LANGUAGE USAGE ASPIRATIONAL — UBER'S WRITTEN INSTRUCTIONS NOT UNDERSTOOD

Local contexts help global strategies

Digital services — include broad demographic categories
Build insider/outsider perspective for research teams
- OUTSIDER: cultural nuances
- INSIDER: prevent bias with assumptions, methods, studies

INCREASES DIVERSITY of PERSPECTIVES
2017 — Woman President of Saudi sports federation, women encouraged to work and drive
BUT FAMILY and MARITAL CULTURE MOVING SLOWER than POLITICAL
We created a research protocol for diverse participants:
- No real names, no photography, no NDAs
- ALLOWED REALISTIC RECRUIT OF WOMEN as they are

3 REMOTE and ON-THE-GROUND
Remote methods are efficient and inclusive, allowing participation across locations/regions
Respecting g-local complexity required on-the-ground as well

HYBRID APPROACH IDEAL
Africa least connected continent — high use of smartphones — so we needed to understand local behaviors and habits
Interviews facilitated digitally — ensure comfort

Digital Connectivity lets people participate in democracy and society... is key for certain services

4 BILLION PEOPLE w/o INTERNET ACCESS
COMPLEX DIGITAL DIVIDE
- ECONOMIC: Access to devices
- USABILITY: Complexity to learn
- EMPOWERMENT: Few people understand power tech can give them, limit their online activities
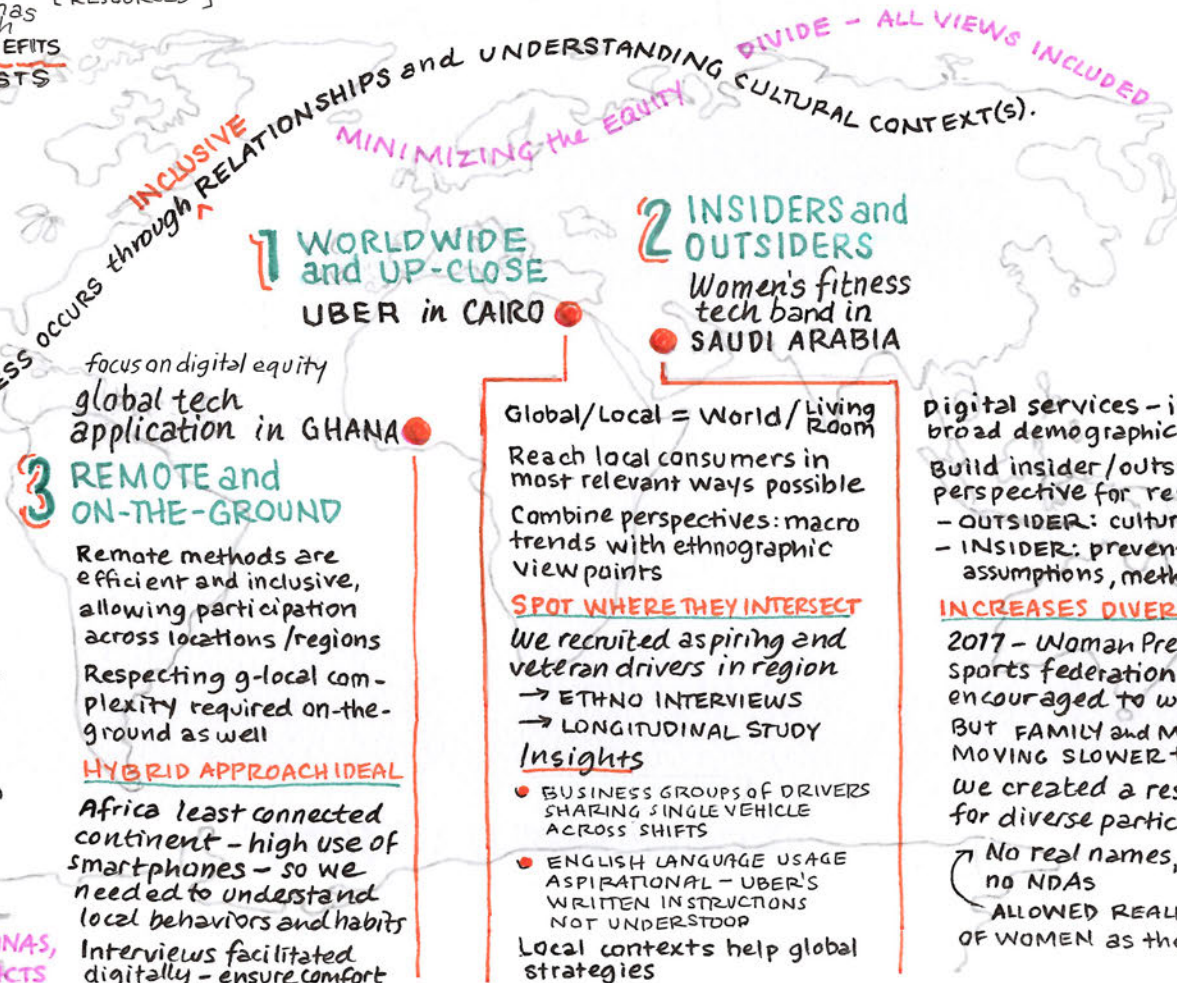
NEED TO LOOK BEYOND PERSONAS, HCD, OTHER RESEARCH ARTIFACTS

AfroFuturism as Research Method
Potential Directions for Inclusive Research

As someone who isn't working on projects for majority Black users, these principles are useful ways of adapting AfroFuturist methods to create inclusive, pluralistic experiences.

FLORENCE OKOYE
Senior UX Designer, **Natural History Museum** (LONDON)

AFROFUTURISM
what is it and WHY is it needed?

PRACTICE

What am I accountable to?

For which forces am I going to be an agent?

What will save communities/user groups from my actions as a researcher/designer?

WHAT MIGHT A PRACTICE LOOK LIKE THAT understands:

- RACISM EXISTS and IS FOUNDATIONAL to our way of life

- The ALIENATION borne via RACIAL CAPITALISM is REAL and IMPACTS RELATIONS between maker and user (US) (communities we serve)

VIDEO 4:15
FLORENCE PROVIDES PERSONAL AND PROFESSIONAL EXPERIENTIAL CONTEXT

the commons SHARED LAND, RESOURCES, ETC.

I AM EMBEDDED in PUBLIC or SEMI-PUBLIC SECTORS

PRAXIS

what is praxis in systems charting anti-colonial paths?

WHAT METHODS ADDRESS PARTICIPANTS AS...

RESEARCH SUBJECTS
SOLUTION CREATORS
MOVEMENT PARTICIPANTS

What does inclusive design look like in complex contexts?

How do we design for the commons?

check out the writings of IGNATZ on SUBSTACK

Story-telling as REQUIRE-MENTS GENERATION... Call and response as DISCURSIVE STRUCTURE

AFROFUTURISM as critique?

By centering the "DISCARDED" (victim) it breaks down hegemonic notions of objectivity BREAKS DOWN BORDERS and BINARIES e.g. HARD vs. SOFT TECHNOLOGIES

MODERNITY WAS BUILT ON BLACKNESS and SO ARE OUR MULTIPLE PROPOSED FUTURES. IT IS BLACKNESS WHICH, HISTORICALLY and STILL, GLOBALLY PROVIDES ENSLAVED LABOR and THE MINERAL RESOURCES to MAINTAIN OUR CIVILIZATION AT SCALE.

A lot of this came from my participation in, and facilitation of SERVICE DESIGN JAMS
*SHOUT OUT TO Adam Lawrence & Markus Hormeß

What makes AfroFuturist techniques useful (and usable)

- They don't see racism and race as an add-on to the social experience. RESEARCHERS SHOULD NOT AVOID HIGHLIGHTING RACIALIZED CONTEXTS AND EXPERIENCES... AS UP FRONT AS POSSIBLE

- They focus on making as a way of understanding

- They do credit to social design methods that have been patronized or ignored

AFROFUTURISM IS OFTEN EXPRESSED AS AN AESTHETIC where Afrikaanist and Science Fictive imagery are combined

... characterized as a program for recovering the histories of counter-futures created in a century hostile to Afro-diasporic projection and as a space within which the critical work of manufacturing tools capable of intervention within the current political dispensation may be undertaken ' KODWO ESHUN CULTURAL CRITIC

I HAVE ALWAYS BEEN DRAWN TO THIS DESCRIPTION
So I then rethought cultural practices as DESIGN METHOD BREAKING DOWN COMMUNAL RITUALS

ANALOGOUS to the DESIGN PROCESS
Alchemy
IGBO Masquerade (SOUTHEAST NIGERIA) with me since childhood

Theme 2: Researchers as Organizational Changemakers

ZOOMING IN

THEME 1
Societal and foundational

THEME 2
Organizational

THEME 3
Our Practice day-to-day

curated by **CHRISTOPHER GEISON**
User Researcher @chrisgeison

INSIGHT → ACTION

Let's shake shit up!

I love when we come together as a community. YESTERDAY (DAY 1) WAS AMAZING! **I AM PSYCHED for TODAY** — also — I HAVE TO ACKNOWLEDGE THAT THIS IS A WEIRD TIME for RESEARCH. *LAYOFFS* HAVE TORN THROUGH OUR FIELD. DOUBTLESS SOME OF YOU HAVE BEEN LAID OFF. SOME OF OUR SPEAKERS HAVE, TOO. I'VE BEEN LAID OFF. *It's hard to think about ADVANCING RESEARCH when so many of us are just trying to get back to where we were.* BUT I SUBMIT TO YOU THAT **THERE'S NO BETTER TIME TO ADVANCE RESEARCH than NOW.** WE WILL BOUNCE BACK FROM THIS. LAYOFFS HAVE HAPPENED BEFORE, AND THEY WILL AGAIN... WHEN THEY DO, WE NEED to MAKE SURE THEY DON'T TREAT RESEARCH the WAY THEY HAVE OVER the PAST COUPLE of MONTHS. WE DON'T JUST NEED to DO A BETTER JOB of ARTICULATING OUR VALUE ... WE NEED to BECOME MORE VALUABLE. IN MY OPINION, the WAY WE DO THAT IS to STEP OUT FROM INFORMING DECISIONS INTO BECOMING **Organizational Changemakers**

Insight has immense potential to **galvanize, transform,** and act as a force for **change within a business.** Today we will dig deeply into **compelling stories and case studies** from insight teams that have successfully **elevated their voices** and **created meaningful change** at an organizational level.

TODAY IS A BRIDGE *between* THEME 1 and THEME 3
THE ASTUTE OBSERVER WILL NOTICE TALKS (OVER the COURSE OF the DAY) START CLOSER to THEME 1 and END CLOSER to THEME 3

I INVITE YOU TO TAKE the LESSONS LEARNED and THE PROVOCATIONS SHARED BACK into YOUR WORK

PRAYAG NARULA & RIDA QADRI — The role qualitative research can play in getting our orgs to center humans in A.I. innovation. Participatory research — what is it, really?

SCOTT PLEWES — How insights go viral... An unorthodox approach to integrating qualitative thinking and quantitative thinking using conceptual mathematic models

CARL TURNER — Frameworks to understand organizational and cultural issues in order to revive projects that seem doomed.

MIKE OREN — Research as Organizational changemaking inspired by models used in Pharmaceutical industry

SARAH FATHALLAH — A framework that breaks us out of that binary participatory or non-participatory way of thinking

ANNE MAMAGHANI — How to prevent generative workshops — such as design sprints — from devolving into political theater

KRISTIN GUTH, Ph.D. — Workshop approach to drive clarity and align stakeholders

SHIFTING OUR ORGANIZATIONS' WAYS of LEARNING, THINKING, and DOING

WE RESEARCHERS have the opportunity TO USE OUR POSITION, ORIENTATION, and OUR SKILLS to lead change

HCI 2.0: Humanity Deserves the Attention That UX Research Has to Offer

PRAYAG NARULA
Co-Founder & CEO, Marvin

RIDA QADRI
Research Scientist, Google

Talking about our RESPONSIBILITIES as researchers, one of the things that fascinates me about your journey, Rida, is your research on MOBILITY PLATFORMS (in U.S. this is Uber or Postmates) and how differently they were being used in Southeast Asia. Tell me how this came to be, what you found out, and its IMPACT ON YOUR CURRENT GENERATIVE A.I. WORK.

In 2016-17 I was in Jakarta — a time when there were massive concerns in the U.S. about impacts of mobility platforms (labor market, drivers, exploitation, broad concerns about algorithms being the boss, etc.). I went with a similar narrative of how Indonesian platforms were transforming the mobility market. BUT I FOUND PRE-EXISTING PRACTICES — ORGANIZED in AN UNREGULATED JAKARTA MARKET — WERE STILL PRESENT DESPITE the DISRUPTION. Biggest difference: drivers self-organized around BASE CAMPS (their term) which are physical locations which had uniforms, badges, logos, even souvenirs and elections. Drivers could charge their phones, go on break, get food, and more. THIS WAS COMPLETELY UNEXPECTED and IN CONTRAST to THE DRIVER ALIENATION in the USA. THE IMPORTANCE of GROUNDED QUALITATIVE RESEARCH — AND DEVELOPING RELATIONSHIPS WITH PEOPLE in LOCATION STUCK WITH ME. **LESSONS** CONTEXT MATTERS: TECH DOESN'T HAVE A UNIVERSAL IMPACT, IT VARIES despite assumptions.

DISRUPT OUR OWN ASSUMPTIONS BY TALKING WITH END USERS on the GROUND.

INNOVATION COMES FROM USERS. They are smart and will use technology in unexpected ways. DON'T ASSUME TECH as designed IS THE BEST SOLUTION and WILL HAVE EXPECTED IMPACTS.

So it will be important to understand context for companies doing fast-release A.I. features because the impact it has (or will have) is unclear. I see researchers as flag-bearers in our communities but there was a gap between what researchers thought a company should build and what the community actually needed. HOW CAN WE (UXRs) NARROW THE GAP and WHAT ARE OUR ETHICAL RESPONSIBILITIES, ESPECIALLY RE: A.I.?

Remember to recognize that qualitative UXRs have power — to unearth rich insights that would otherwise be lost re: what and why something is happening. For generative A.I. we have tools to bring insights throughout. FOR EXAMPLE: Evaluations of A.I. models are automated. 'Toxic content' classifiers have built-in assumptions based on what is narrowly defined in U.S. as 'toxic.' As a qualitative researcher you help build evaluations that consider social context for toxicity and can recognize how things differ across the world. We need qualitative UXRs to get foundational knowledge of the local context(s). Also to push back on automated measures and use human feedback for development pipelines.

WE CAN DESIGN BETTER HUMAN-IN-LOOP GUIDELINES THAN WHAT WE HAVE NOW BECAUSE WE WILL THINK MORE DEEPLY

Training algorithms on proper responses to content requires human input throughout. A.I. platforms: Is there still a gap — from an ethical point of view — in what companies are doing and what needs to be done?

Think about things like CONTEXT ON-the-GROUND IMPACT PROCESSES of DEVELOPMENT WHO is INVOLVED COMPLEXITY of the WORLD (in general) Impact won't be as contained as assumed. Often, research is testing tech at the end as opposed to foundational insights about its usefulness and problem-solving capacities. Different UXRs have different levels of agency, power, and social capital. Make a big-picture plan that can be executed at different levels. We want to make space for more diverse and inter-disciplinary conversations, like building humanistic tech. Requires expertise you may not have — ask if you can partner with someone, even in your teams. Where can we have conversations elsewhere? DON'T UNDERESTIMATE the POWER OF THIS.

You spoke about POWER DYNAMICS: ① POWER IMBALANCES BETWEEN UXR and communities being studied, and ② POWER BALANCE UXR HAS WITHIN an ORGANISATION HOW DO YOU BALANCE THESE GIVEN the ENVIRONMENT of DISINVESTMENT in RESEARCH plus FEAR of "ROCKING the BOAT"?

▶ SEE VIDEO for RIDA'S REPLY plus Q&A

A Typology of Participation in Participatory Research

CAN BE AN ETHICAL COMMITMENT.
SHOULD NOT BE THE ONLY ETHICAL COMMITMENT.
It needs to be paired with other things like trauma-informed principles and care

SARAH FATHALLAH
VP of Research and Design, Think of Us
@sft71a

CONTEXT: My work is in FOSTER CARE SYSTEM where THIS happens, so it is CRUCIAL not to replicate this kind of injustice in any research processes

I'm excited that Rida and Prayag (prior talk) spoke about the DISTANCE — both PHYSICAL and PROCEDURAL — that is found BETWEEN RESEARCHERS and THE COMMUNITIES THEY STUDY. Oftentimes PARTICIPATORY RESEARCH is the METHODOLOGICAL TOOLKIT used to BRIDGE THAT DISTANCE ← WHY I'M HERE TODAY!

unjust control — when important life-altering decisions are made without the involvement of people whom the decisions affect

IMPORTANT to BE INTENTIONAL about the ways we INVITE PARTICIPATION SO PEOPLE CAN EXERCISE AGENCY & AUTONOMY

What is PARTICIPATION?

Contributory autonomy

ORIGINATES in 1969 with the LADDER OF CITIZEN PARTICIPATION which LINEARIZES roles and power transfer

ORIGINAL CONTEXT: URBAN RENEWAL/ECONOMIC DEVELOPMENT now used for domains like PATIENT ADVOCACY & CHILD DEVELOPMENT

THE PARTICIPATORY CITIZEN (book)

8	CITIZEN CONTROL	DEGREES OF CITIZEN POWER
7	DELEGATED POWER	
6	PARTNERSHIP	
5	PLACATION	DEGREES OF TOKENISM
4	CONSULTATION	
3	INFORMING	
2	THERAPY	NON-PARTICIPATION
1	MANIPULATION	

by Sherry R. Arnstein
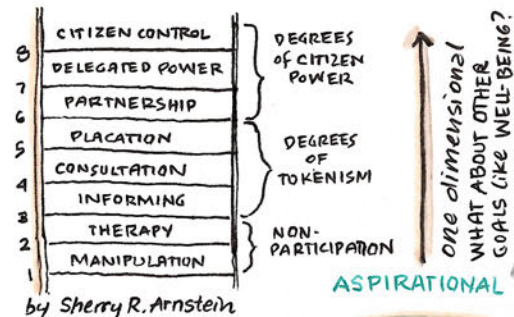
one dimensional — WHAT ABOUT OTHER GOALS LIKE WELL-BEING?

ASPIRATIONAL

Participatory Action Research

THE SPIRAL used widely in many different contexts

PLAN → ACT & OBSERVE → REFLECT → PLAN → ... → (the action) ACT → REFLECT (the research) → ACT ...

IDEA of CONSTANTLY MONITORING PROGRESS and PROBLEM DEFINITION Commitment to feedback and inclusion of participants THROUGHOUT the LIFECYCLE
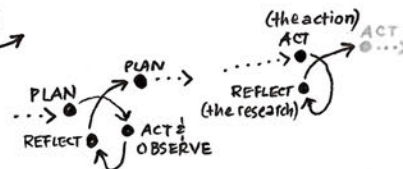
So, what does make research participatory or not? IT'S NOT A BINARY yes/no

TEMPORALITY introduced

Is this research participatory? (crossed out) → WHEN and HOW PARTICIPATORY is this research? Instead, ask

TEMPORAL & ASPIRATIONAL elements

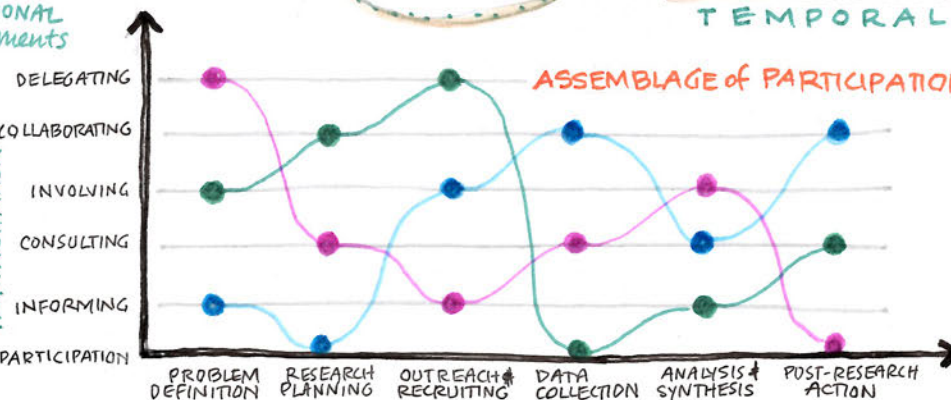BEING PARTICIPATORY is not devoid of harm = Engaging more people in process
≠ Caring for them
≠ Valuing them
≠ Relating to them with mutuality

PROPER COMPENSATION
SHARING RESOURCES and KNOWLEDGE
INVITING PEOPLE TO SPACES

ASSEMBLAGE of PARTICIPATION

DEGREES OF PARTICIPATION (y-axis):
DELEGATING
COLLABORATING
INVOLVING
CONSULTING
INFORMING
NON PARTICIPATION

SITES of PARTICIPATION (x-axis):
PROBLEM DEFINITION | RESEARCH PLANNING | OUTREACH & RECRUITING | DATA COLLECTION | ANALYSIS & SYNTHESIS | POST-RESEARCH ACTION

This can serve as a retroactive and proactive planning prompt. Can also improve project scope at the very beginning, and/or improving data collection for future studies.

what does this look like in practice? Sarah SHARES A CASE STUDY

@advancingresrch #AR2023
28 March 2023

Why Isn't Your UX Approach Going Viral?
A Mathematical Model

IS THIS MATH THEATER? It's worth a try to see what you think

SOME PEOPLE are BUILDING BRIDGES like Google's QUANT UX Con

math + UX

Here is my foray to illustrate a concept you (and others) can build upon and disagree about... We are just figuring this out, so I'm open to hearing different views.

SCOTT PLEWES
Chief Strategy Officer, AKendi
I've been doing UX work for many years but my training was in theoretical physics (with a lot of math I haven't much used...until recently)

more and more **MATH** is coming our way...

WEAPONS OF MATH DE-STRUCTION

QUANTUM METHODS in SOCIAL SCIENCE

Some people are warning about it, as math can be misleading, dangerous, or have biases (like A.I.)

BUT combining it with HUMANITIES brings TREMENDOUS BENEFITS
This is super interesting

VIRAL MATH MODEL

FIRST

BACKGROUND
FOR the "LESS MATH-Y" FOLKS

VIRAL = EXPONENTIAL GROWTH
$2 \times 2 = 4 \times 2 = 8 \times 2 = 16 \times 2 = 32 \times 2 = 64$ etc.

versus LINEAR GROWTH (additive)
$2 + 2 = 4 + 2 = 6 + 2 = 8 + 2 = 10 + 2 = 12$ etc.

ILLUSTRATIVE STORY ABOUT MATHEMATICIAN TEACHING A KING TO PLAY CHESS...

LIKE TECHNOLOGY, YOU DON'T HAVE TO BE AN EXPERT TO FIGURE IT OUT

MODEL = SIMPLIFIED REPRESENTATION of a SYSTEM * ITS
can be anything... THIS CONFERENCE, A PERSONA or JOURNEY MAP... WE USE THEM ALL THE TIME!
CHARACTERISTICS AND/OR BEHAVIOR

$F = ma$
EX: Newton's SECOND LAW
EINSTEIN

GROWS Incredibly fast

compared to linear
eventually SOMETHING slows it down

SIMPLE FLU MODEL (CONCEPTUAL)
SUSCEPTIBLE
INFECTED
REJECTED by FLU

CAN BE USED TO TRACK NUMBERS

The SIR model is used in many domains and has done relatively well in predicting how systems apply

MATH MODEL = SIMPLIFIED REPRESENTATION of a SYSTEM
simplest version is counting things in the system
USING MATH

NUMERIC BEHAVIOR

Add MORE DATA, advance both models

OFTEN COMES WITH CONCEPTUAL MODEL

the WHY

EX: Newton's FIRST LAW

IF YOU SWAP FLU SUSCEPTIBILITY for:
- organizational openness to UX
- Adoption of UX
- Rejection of UX

YOU HAVE A CONCEPTUAL MODEL FOR HOW UX IS WORKING IN YOUR ORG.

The NOTION of the MATHEMATICS is that it implies that there's a RELATIONSHIP between these three things
○ = ○
RELATION-SHIP

with all this in mind, let's take a leap of faith

EQUATIONS EXIST that DICTATE HOW THESE CHANGE OVER TIME

DIFFERENTIAL EQUATIONS are how relationships change over time

I ASKED How did UX "spread" within your org?
well...

WHAT INSIGHTS COULD BE MAPPED TO VIRAL MODELS? Commonalities:
- COMPETING VARIANTS
- SUB-GROUPS INNOCULATED/RESISTANT
- SUPERSPREADER EVENTS
- SUPERSPREADERS
- ENDEMIC: USABILITY TESTING

[Graph: POPULATION (y-axis: 0.2, 0.4, 0.6, 0.8) vs TIME (DAYS) (x-axis: 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100)]
EQUATIONS included on slides
— SUSCEPTIBLE
— INFECTED
— REJECTED

CONCEPTUAL MODEL elements may suggest why your UX is (or isn't) going viral
ASK DIFFERENT QUESTIONS... then, depending on the answers, go back to the **MATH MODEL** gather data, and see if there are meaningful measurements

SO WHAT?
DEFINING the VIRAL STATE
- MONEY SPENT
- RESOURCES / PEOPLE
- TECHNIQUES APPLIED
- PROJECTS ADOPTING
- AND MORE...
In principle, do computations

Not easily in common:
- ATTACHED TO BUSINESS STRATEGY PROCESS
- UX BY UNQUALIFIED PERSONNEL
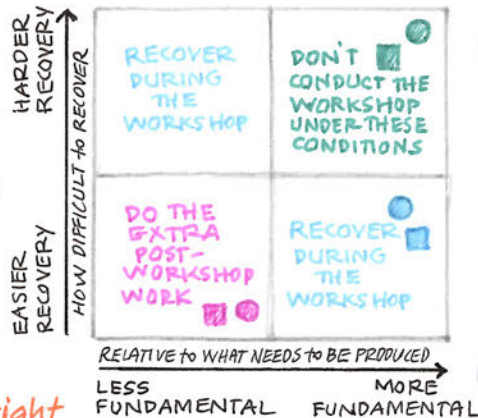- ARE THESE SYMPTOMS IN the MODEL?

How Your Organization's Generative Workshops Are Probably Going Wrong and How to Get Them Right

THE TOP SIX WAYS TO DOOM YOUR PRODUCT TO FAILURE BY CONDUCTING DESIGN SPRINTS

ANNE MAMAGHANI
Founder + CEO, Wisdom Driven UX

GOAL

Human needs, behaviors, attitudes → CONCEPT(S)

I'm excited to talk with you all today. Please feel free to send questions and comments via Slack and continue the conversation... we all have great experience and expertise. NOTE: I WILL USE THE TERMS 'WORKSHOP' and 'DESIGN SPRINT' or 'SPRINT' INTERCHANGEABLY IN THIS TALK.

"The difference between the almost right word and the right word is really a large matter — 'tis the difference between the lightning-bug and the lightning."
— MARK TWAIN

Think of the outcomes of this specific, tactical research method (design sprint/workshop) as yielding the difference between the lightning and the lightning-bug.

⚡ ≠ 🐝

WORKSHOP MISTAKE DECISION MATRIX

HARDER RECOVERY

- RECOVER DURING THE WORKSHOP
- DON'T CONDUCT THE WORKSHOP UNDER THESE CONDITIONS
- DO THE EXTRA POST-WORKSHOP WORK
- RECOVER DURING THE WORKSHOP

EASIER RECOVERY

HOW DIFFICULT TO RECOVER

RELATIVE TO WHAT NEEDS TO BE PRODUCED

LESS FUNDAMENTAL → MORE FUNDAMENTAL

1 SPRINT as THEATER
The sprint's purpose is political, designed for looks vs. effectiveness

INITIATORS Non-UX; Cross-functional leads

WHY NOT? Won't result in production concept that is effective in representing human needs and attitudes

INSTEAD Find alternatives; Handle larger cultural issues re: working w/UX

Note: Organizations have many dynamics so this may not be intentional

5 POOR FACILITATION
Facilitator doesn't effectively manage personalities, inattention, schedule, and more

INITIATORS Those who step up may not have expertise (developed skill set)

WHY NOT? successful facilitation requires ability to manage many things: diatribes, people talking at different levels of detail, inattention, team stamina, choices that need to be made on the fly, and more.

INSTEAD Consider training one or more facilitators, have them come in to assist

3 LACK of RESEARCH
No research is conducted at start and/or end of sprint

INITIATORS Workshop planning novices

WHY NOT? Concepts may not resonate with users

INSTEAD Start with a lit review and user observation, then test the concepts with users afterward

4 EXCLUDING KEY FOLKS
A group that is functionally imbalanced and/or excludes decision-makers

INITIATORS Those worried about time

WHY NOT? Surprise blockers result

INSTEAD Ensure a mix of roles; Invite others for "showcase" to discuss findings; Ensure sprint team has the authority and/or decision-maker present

2 FAILING to STRUCTURE
Not using the structured exercises necessary for resulting concepts to reflect insights

INITIATORS Sprint planning novices; people unskilled with their confirmation biases

WHY NOT? Lack of structure to get from insights of human needs and attitudes to a concept reflecting them. DATA → CONCEPT

INSTEAD Ensure sprint is solving a problem; Create agenda with carefully-chosen exercises; Start by aligning on rules

6 TOO MUCH SCALING BACK
To save time, the sprint is designed in a way that excludes important exercises

INITIATORS Concerns about product timelines; Requests to contain the work within X days

WHY NOT? Can render sprint ineffective; How much to scale back? Disagreement about what is fundamental, what is not.

INSTEAD Scale back as appropriate and communicate trade-offs that result so all are aligned and aware of impacts to outcome.

These six mistakes are the most commonly made, and the most detrimental to process and outcomes

INEFFECTIVE WORKSHOP / CONCEPT ← LESS SUCCESSFUL

EFFECTIVE WORKSHOP / CONCEPT → MORE SUCCESSFUL

PRODUCT IN MARKET COMPANIES
SATISFACTION OF PEOPLE MAKING/USING PRODUCT

You Can Do This! Understand and Solve Organizational Problems to Jumpstart a Dead Project

When projects are late or delayed, this is often not due to the project team, but the organizational and cultural issues that surround it. UXR has the right skillset to solve.

CARL TURNER, Ph.D.
Senior Business Architect, Triangle Business Architecture

This is the fun stuff!

SOFT SYSTEMS METHODOLOGY ← Super-helpful BOOK for modeling influence in practice

PICTURE THIS: You've been added late to an enterprise level project with a big impact, but it has been going on for months... with zero lines of usable code. WHAT WOULD YOU DO?

01 Frameworks — A LENS for VIEWING, AN APPROACH for DOING

- **ENGAGEMENT** — we approach our work as would a consultant
  - **Analyze** INVESTIGATE, COLLECT DATA, SYNTHESIZE
  - **Recommend** DESIGN and DELIVER SOLUTIONS
  - **Persuade** CONVINCE DECISION-MAKERS into ACTION

  Ways to do this range from helicoptering in and throwing a slide deck over the wall to encouraging people to do co-discovery (which makes persuasion so much easier) SEE KRISTEN GUTH'S TALK (NEXT UP)

- **DOMAIN**
  - **Immediate Domains** FUNCTIONAL AREA & INDUSTRY VERTICAL
  - **Extended or Background Domain**
    ORGANIZATION'S MONITORING & SUPPORT PROCESSES essentially the organizational context for project and its success

- **PROBLEM-SOLVING**
  - **Situation** NAME THE EVENT OR CONDITION THAT NEEDS ATTENTION
  - **Task (Goal)** TALK ABOUT WHAT NEEDS TO BE ACHIEVED
  - **Actions** WORK DONE TO SATISFY THE GOAL
  - **Results (Insights)** WHAT HAPPENED — STATED AS AN OUTCOME. WHAT WAS LEARNED.
    These (results) can be about solving a problem or even causing more chaos

  WRITE this OUT
  (I USE the S.T.A.R. FORMAT for MY CASE STUDY)

02 Modeling the Organization and Culture

MAKING EXPLICIT the INFLUENCE of CONTEXT ON TEAM PERFORMANCE

ORGANIZATION
- Mission and Goals
- Functional Areas
- Stakeholders

focus on the ways these connect to and inform your project

CULTURE
- VISIBLE ARTIFACTS structures, processes, behaviors
- DIALOGUE espoused beliefs and values
- ASSUMPTIONS unconscious beliefs and values

HARD TO UNCOVER; DRIVES BEHAVIOR

CULTURE INFLUENCES RECOMMENDATIONS YOU MAKE and HOW TO PERSUADE STAKEHOLDERS
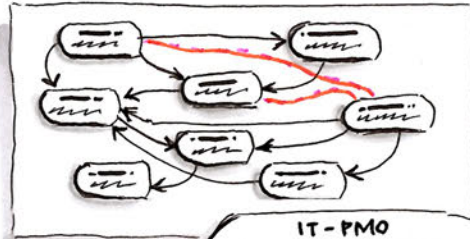
MAPPING THIS HELPS

IT-PMO
We report to IT Mgt. and Program Mgt. We prioritize and staff projects with direction from Program Mgt. PMs struggle with Agile/Scrum roles. Find it difficult to estimate time/cost for projects.

Figure out who the players are and their functional areas.

→ Connections indicate relationships
- - - indicates people at odds

03 Case Study — A HIGH-PROFILE I.T. PROJECT GOING NOWHERE

CARL TALKS THROUGH the DETAILS of HIS PROJECT RESUSCITATION SUCCESS *See video for full detail!*

SIX SITUATIONS/PROBLEMS to be SOLVED

OCT.18 — The project is dead
Why is the project dead?
- ▶ LOOKED AT IMMEDIATE and EXTENDED DOMAINS, and HOW the LATTER AFFECTED the PROJECT
- ▶ ANALYSIS CONDUCTED; THEMES IDENTIFIED

OCT.19 — Management cannot support the project How do we organize them?
- ▶ S.T.A.R. CREATED as RECOMMENDATION

DEC.11 — No analysis or design have been done. How do we get this done?
- ▶ S.T.A.R. CREATED as RECOMMENDATION

FEB.3 — Developers don't have the necessary domain knowledge How do we bring them up to speed?
- ▶ S.T.A.R. CREATED as RECOMMENDATION

MAY 12 — Team still doesn't work like a team How do we improve our performance?
- ▶ S.T.A.R. CREATED as RECOMMENDATION

JUN 1 — External projects are not engaged How do we get them to work with us?
- ▶ S.T.A.R. CREATED as RECOMMENDATION

Out of the FOG: A Non-Traditional Research Approach to Alignment

INTEGRATE FAST and SLOW THINKING for DECISION-MAKING

KRISTEN GUTH, Ph.D.
Senior User Experience Researcher, Snowflake, Inc.

Researchers might hear from team members...

- We don't have time for research
- We aren't sure of the problem we're addressing.
- We've tried this approach before, but it hasn't worked.
- And past product launches feel as if the product barely resembles the original plan.

Research is often seen as SLOW and A COST CENTER

But SLOWING DOWN can help our VELOCITY move faster.

COLLECTING Facts Opinions Guesses from STAKEHOLDERS TO ENABLE ALIGNMENT

FACILITATED METHOD
slows down GRINDING MOMENTUM

WHY?

IS A SHARED MENTAL MODEL THAT DRIVES FORWARD TEAM DECISION-MAKING DUE TO PERCEIVED PRESSURES, TIMELINES OR EXPECTATIONS

HOW WE THINK

CHALLENGES for RESEARCHERS
- ESTABLISHING SENSE of SHARED TEAM VISION
- SEPARATING FACTS FROM FICTION
- MOVING the TEAM PAST HANGUPS TO ESTABLISH RESEARCH STRATEGY and PRODUCT DIRECTION

FOG GOALS
- IDENTIFY and UNDERSTAND TEAM QUESTIONS
- COLLECT EXISTING DOCUMENTS THE TEAM USES
- IDENTIFY KNOWLEDGE GAPS
- FACILITATE a BRAINSTORM of FACTS, OPINIONS, GUESSES

See VIDEO and SLIDES for research approach w/ FOG

Thinking you know
Knowing without Knowing

WHY do you know
How you know

INTUITION
SYSTEM 1
Fast
Automatic
Frequent
Emotional
Stereotypic
Unconscious

gut sense

ANALYTICAL
SYSTEM 2
Slow
Effortful
Infrequent
Logical
Calculating
Conscious

deliberate

They COMPLEMENT

EXPERT INTUITION Requires conditions of context

1 REGULARITY   2 PRACTICE   3 FEEDBACK

THE OPPOSITE POSITIONING IS ASSUMED
TECH/BUSINESS Analytical   UX/DESIGN Intuitive

DOES YOUR PRODUCT OR XFN TEAM RELY MORE ON INTUITIVE THINKING or ANALYTICAL THINKING?

WHICH IS YOUR RESEARCH TEAM PERCEIVED TO PROVIDE?

An organization's decision-making matures through three information processing phases:
- PRODUCT or SERVICE INTUITION
- DATA to SCAN the ENVIRONMENT
- RESEARCH to PROACTIVELY COLLECT and ANALYZE

Orgs. can get caught in a loop applying the same approach to novel contexts without success.

GRINDING MOMENTUM

Facilitating a FOG SESSION

- Visibility of approaches and opinions
- Supported cohesion and enablement

IMPACT

PREWORK
- WRITE 5-10 STATEMENTS THAT CAPTURE FACTS
- LINK the SOURCES FOR THESE STATEMENTS
- ADD THEM to a DIGITAL WHITEBOARD in ADVANCE

STRUCTURE (3 HOURS)
HOUR 1   HOUR 2   HOUR 3
FACTS   OPINIONS   GUESSES

- 15 min: Write statements or affinitize others'
- 20 min: Small group breakout on prioritization
- 25 min: Large group discussion

FACTS
What do we know about [PRODUCT]?

POINT OUT: OPINIONS WHAT PEOPLE BELIEVE BUT HAVE NO EVIDENCE OF
GUESSES ARE FORWARD LOOKING (WHERE TO GO NEXT)

BUSINESS IMPACT
- DOCUMENTATION TO PREVENT RESEARCH AMNESIA
- DIFFERENTIATION OF FACTS, OPINIONS, AND GUESSES
- RESEARCH SEEN AS A PARTNER
- SHARED UNDERSTANDING ENABLED PROGRESS TOWARD SHARED PRODUCT DIRECTION AND VISION

Rethinking Discovery Research Inspired by Pharma R&D

▶ MIKE SHARES SEVERAL EXAMPLES → REAL-WORLD

MIKE OREN
Head of Design Research, **Klaviyo**

EVERYONE WANTS TO CREATE, BUT SOMETIMES WHAT IS NEEDED IS CREATIVE DESTRUCTION

You are primarily in the business of making a business run smarter.

Good way to change minds and processes

DESIGN THINKING — PHARMA RESEARCH — two different worlds — COMBINE —

PRINCIPLES of PHARMACEUTICAL RESEARCH APPLY to DESIGN THINKING... UNLOCK NEW FRONTIERS

BEST of BOTH for *Revolutionary* NEW APPROACH to PROBLEM-SOLVING

As the world changes, we need to change...
👀 PAST DECADE WAS ONE OF FREE CAPITAL
NOW IN ERA OF HIGH UNCERTAINTY and EXPENSIVE INVESTMENTS

OUR DISCIPLINE HAS REACHED A CRITICAL TIME to RE-EVALUTE OUR PROCESSES to ~~SURVIVE~~ THRIVE

Why do our processes spend so much time on DISCOVERING and IDEATING?

DESIGN CHALLENGE | PLAN | EMPATHIZE | REFRAME | IDEATE | PROTOTYPE | TEST
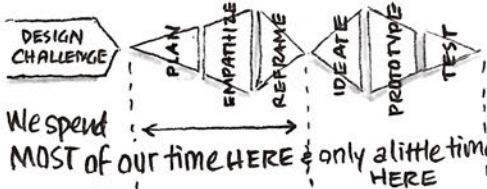
We spend MOST of our time HERE & only a little time HERE
Then, factor in the DEMOCRATIZATION of UXR

Bringing software to market QUICKLY — and in a SCALABLE way — is expensive and time consuming.

HMW UNDERSTAND IDEAS and MAKE PIVOTS AS QUICKLY AS POSSIBLE?

Sure, there's THE AGILE Process BUT OUR TEAMS ARE RARELY AGILE ENOUGH TO IMPLEMENT THIS

WHAT IS the VALUE of DESIGN?
Forrester's studies say... [and IBM and McKinsey]
#1 Elimination of redundant processes
#2 Elimination of unnecessary features, products, or services

New ideas/changes to business strategy was rated VALUABLE to only 18% of business leaders

"The essence of strategy is choosing what not to do." —Michael Porter

THIS IS WHERE the PHARMACEUTICAL MODEL COMES IN ... MINIMIZE RISK and COSTS by CONDUCTING *hundreds of experiments* — WITH ONLY a 2% ADVANCEMENT RATE — TO FOCUS on HIGH-RETURN PRODUCTS and ELIMINATE UNSUCCESSFUL IDEAS QUICKLY

WHAT IS the VALUE of RESEARCH?
We say "the earlier you do research, the more MONEY YOU CAN SAVE."

TOO OFTEN, THAT'S IN USABILITY, NOT GENERATIVE RESEARCH
[TO TAP INTO UNMET NEEDS and MAKE THE ORG. MORE MONEY OR SAVE MONEY IN WASTED RESOURCES]

DISCOVERY RESEARCH STILL HAPPENS

When to use LARGE DISCOVERY
- CREATING a NEW MARKET (rare)
- BREAKING EXISTING WORKFLOWS TO FORCE ALTERNATIVE THINKING
  ← Needs an executive champion to drive change

PIVOT — NEW IDEAS → SAVING MONEY

- FOCUSES ON WHAT DRIVES VALUE for the CUSTOMER
  They will more easily accept price increases
- FOSTERS a LEARNING MINDSET CULTURE and GETS the TEAM TO GRASP FINDINGS
- BUILD A KNOWLEDGE REPOSITORY to AVOID INCREMENTAL INNOVATIONS

INTEGRATED DISCOVERY
- CHANGES the PERCEPTION of DISCOVERY AS COSTLY
  "Here are the core things we need to DE-RISK, in order to be successful."
  - Reducing potential investment
  - Reducing features
  - Reducing overlap of company-wide explorations

THIS APPROACH CONNECTS TO Value of Design (FORRESTER)

DISRUPTIVE STRATEGY MODEL
CURRENT MARKET
LARGE DISCOVERY → TIER 3 "Unexplored"
TIER 1 "soon to be" | TIER 2 "refusing"

- TAKE TIME and INVESTMENT TO REACH MASS MKT.
- DISRUPTORS (LOOK AT BLUE OCEAN FRAMEWORK)

UNDERSERVED or OVERSERVED CUSTOMERS] product too expensive
BE SURE TO TALK WITH NON-CUSTOMERS
OPPORTUNITY to BUILD ADDITIONAL MARKET SHARE

"Finance eats strategy for breakfast." —Clayton Christensen
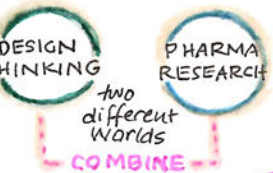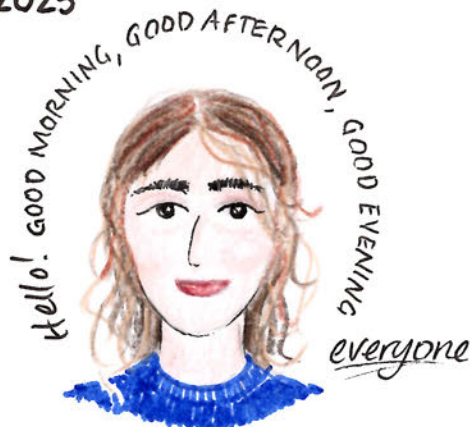👀 WATCH MIKE BREAK THIS DOWN @ 12:00 IN the RECORDING
STELLAR ADVICE

FROM IDEA GENERATION to MONEY SAVED
LOW — HIGH
- START by ADDRESSING the HIGHEST-RISK COMPONENTS of the OPPORTUNITY
- RESEARCH MULTIPLE COMPONENTS TOGETHER in ONE STUDY
- FOSTER a CULTURE OF INNOVATION AND EFFICIENCY

Theme 3: Transforming Our Craft

curated by **JEMMA AHMED**
Head of Insights, Bumble

Today's program will empower you to examine your own journeys — ask yourself what it means to transform our craft.

HELLO! GOOD MORNING, GOOD AFTERNOON, GOOD EVENING everyone

As a *practice*, insight is early in its journey to maturation. Today we will learn from research practitioners who are advancing our craft — in terms of methods and communication skills — and by pushing our work beyond conventional research toward true insight.

I HOPE TODAY'S SPEAKERS ACT AS *HINDS* ... OFFERING MOMENTS OF PAUSE ON WHAT I KNOW IS A HARD JOURNEY ... THE CHANCE ENCOUNTER THAT REVIVES AND RESTORES YOU.

It is my privilege and honor to KICK OFF OUR THIRD and FINAL DAY *sob* by introducing you to our *Delightful* lineup of speakers.

For those who can't tell from my accent, I'm from a relatively rural part of the U.K. One of the things this area is known for is FOLK STORIES. I want to share a story with you called **The Hope of the Hide** MYTHICAL WHITE DEER

A LORD IS RIDING THROUGH THE WOODS ONE EVENING ...

HIS HEART IS HEAVY. FEELING the WEIGHT of the WORLD ON HIM: A PESTILENCE IS IN HIS VILLAGE. HE FEELS HE CAN ONLY LOOK UPON the CRISIS, PAIN, CONFUSION and UNCERTAINTY THAT LIES AHEAD FOR ALL of the PEOPLE.

A BEAUTIFUL HIND APPEARS

HE FEELS COMPELLED TO FOLLOW IT, GOING DEEPER AMONG the TREES

SUDDENLY ...

A CLEARING! THE HIND STOPS. In that pause the lord is filled with HOPE and INSPIRATION.

WITH RENEWED ENERGY and SPIRIT, HE'S ABLE TO GATHER the VILLAGE and ENCOURAGE THEM TO BAND TOGETHER AS A COMMUNITY, SUPPORTING EACH OTHER. INCH by INCH, THEY PULL THROUGH.

What a journey we have today!
EXPLORING DEEPLY FOUNDATIONAL QUESTIONS ABOUT HOW WE CONDUCT OUR RESEARCH

JILL How we can push ourselves to think beyond traditional data to drive organizational wisdom, break down silos, to ensure holistic truth re: customers.

JENNIFER A practical example of how joining different data sources can be done through ecosystem mapping.

CARA & RACHEL Breaking down boundaries and a vision for why we should give much more consideration to secondary research and practical tips for achieving this.

MANSI Sharing practical examples of powerful insights when we bring both primary & secondary knowledge together and a design framework for stronger inclusivity of women

ARI & ARAS Opening up the dialog about democratization who is responsible for data & insights within an org? Practical pros and cons ... and should we move beyond.

VICTOR Taking us home by asking us to challenge the very foundations of how and what we see as data ... what data means in a plural system.

> Just because we have more data doesn't mean we are doing better research. We are drowning in an endless sea of data, yet we are stuck in an insight desert. Such is the contemporary experience of many researchers. — SAM LADNER

MIXED METHODS: A SHORT GUIDE TO APPLIED MIXED METHODS RESEARCH (MAY 2019)

Inconvenient Insights

JILL FRUCHTER
Principal, Field Notes Consulting

LET'S DO THIS
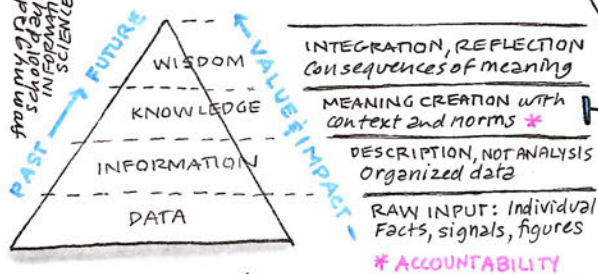- INSIGHTS-DRIVEN VS. DATA-DRIVEN CULTURES
- THICKEN the DATA
- BE a CATALYST for CROSS-FUNCTIONAL COLLABORATION

DO YOU RELATE?

I DO. In this talk I offer some SWIMMING LESSONS to SURVIVE and THRIVE in DATA-SATURATED ENVIRONMENTS

How might we nurture INSIGHTS the way we nurture DATA at our organizations?
WHICH DATA to PAY ATTENTION TO, WHY, and HOW

01 UNPACK ASSUMPTIONS
STEP BACK TO LOOK AT DATA — WHAT IT IS and ISN'T — AND WHERE RESEARCH FITS IN...

From my Grad schooldays in information science

FUTURE / PAST
VALUE & IMPACT

Pyramid (top to bottom):
- WISDOM — INTEGRATION, REFLECTION Consequences of meaning
- KNOWLEDGE — MEANING CREATION with context and norms *
- INFORMATION — DESCRIPTION, NOT ANALYSIS Organized data
- DATA — RAW INPUT: Individual facts, signals, figures

* ACCOUNTABILITY

Why a pyramid?
- HIERARCHICAL
- TEMPORAL PROGRESSION
- VALUE PROGRESSION

Data is something to be acted on, interpreted, in service of a need or goal.

FOR US, THAT VALUE IS BASED ON WHETHER WE ARE CREATING VALUE FOR OUR CUSTOMERS and END USERS

FOR OUR ORGS, THAT VALUE IS BASED ON WHETHER THEY ARE CREATING SHARED VALUE BETWEEN BUSINESS/SERVICE and CUSTOMERS

Feels like it is INVERTED!

What are the consequences when data is more convenient, available, and more fragmented than ever before?

> But knowledge is not a result merely of filtering or algorithms. It results from a far more complex process... Knowledge is not determined by information, for it is the knowledge process that first decides which information is relevant, and how it is to be used. — DAVID WEINBERGER
> "The Problem With the Data-Information-Knowledge-Wisdom Hierarchy" HARVARD BUSINESS REVIEW (2010)

In short, KNOWLEDGE is not derivative.

We need to PAUSE and Reflect

A noun, a verb and a process
- actions
- sense-making
- choice of emphasis & how
- resolution of questions
- connect the dots for holistic assessment of customer experience

WHAT IS Important and Valuable?

RESEARCHERS SEE DATA DIFFERENTLY
It's easy for us to get distracted w/data

UXR UNIQUELY POSITIONED inside ORGANIZATION LANDSCAPE VIEW

OUR ABILITY to NUDGE BEHAVIORS & ATTITUDES through POWERFUL VALUE PROPOSITIONS, DECODED AT THE HUMAN LEVEL

BUSINESS VALUE CREATED THROUGH / BY CUSTOMERS
THEN CODED BACK INTO THE DATA. NOT VICE VERSA.
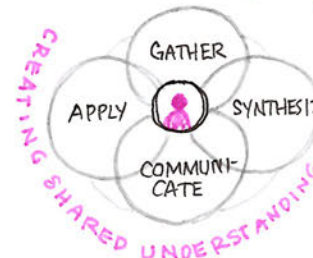
02 CHANGES to RESEARCH PRACTICE
HOW UXR ROLE EVOLVES

THE CLASSIC CONCEPTION OF LOCATION and WORK OF THE RESEARCHER
UNIT of WORK: The Research Study

UXR → GATHER → SYNTHESIZE → COMMUNICATE → APPLY

REFRAME
CREATING SHARED UNDERSTANDING

(circles: GATHER, SYNTHESIZE, COMMUNICATE, APPLY)

AS COLLABORATOR
- ANYTIME PARTNER
- METHOD-AGNOSTIC
- OMNI-CHANNEL DATA SOURCER
- INTERPRETATION FACILITATOR
- IMPACT TRACKER
→ See video for full details VERY COOL

03 RESEARCH INTERVENTIONS
WHAT IS POSSIBLE, DESPITE ORGANIZATIONAL CONSTRAINTS, FOR AN INSIGHTS-DRIVEN CULTURE

1. FLAG FALSE CONCLUSIONS: RECOVER INTENT, CONTEXT, and EMOTIONS TO RECOVER MEANING CASE STUDY
2. MANAGE RESEARCH CALENDARS TO ELEVATE SHARED INTERESTS CASE STUDY
3. MAKE INSIGHTS INTERPRETATION A TEAM SPORT CASE STUDY
4. CONDUCT QUALITATIVE RESEARCH at SCALE THROUGH QUANT CASE STUDY

Sea of DATA?

INSIGHTS Desert?
DESERTS BLOOM, TOO!

Theme 3: Transforming Our Craft *curated by Jemma Ahmed*

Research Democratization: A Debate

In medicine there is INFORMED CONSENT. Business needs to know consequences of non-professional researcher. The purpose of UXR is to DE-RISK DECISIONS YES, the trade-offs are real. Flip side: when we say there is a way of doing UXR we are pulling power away from people.

ARAS BILGEN
UX Consultant / Trainer

ARI ZELMANOW
Head of Experience Research, Core Platform Twilio

while we represent the "poles" of this debate, we don't want to talk about those extremes because they've been discussed extensively.

IN ESSENCE

FOR Democratization breaks down silos, increases company buy-in, and creates a more inclusive environment.

AGAINST Research quality suffers when unqualified people do the work, and its value gets watered down.

LET'S FOCUS ON THE MIDDLE
Where nuance may make or break projects

ARAS TROJAN HORSE IS AN APT METAPHOR... SORRY PEOPLE ARE LOSING JOBS... MANAGEMENT THINKING TOOLS REPLACE PEOPLE FOR RESEARCH ● CONFUSING RESEARCH WITH DATA COLLECTION ● WE HAVE the DATA OURSELVES... NEED TO POSITION UXR TO BE MORE VALUABLE ● RE: THE USE OF RESEARCHER'S TIME, MY COUNTER ARGUMENTS REST IN GRAY SPACE ● UNLESS UXR WANTS TO TRAIN OTHERS... COST TO NOT USING RESEARCHER IN POSITION TO SHOW VALUE ● EXPOSE PEOPLE TO UXR ... UNDERSTAND WHAT WE DO, HOW WE BRING VALUE ● ALSO RISK OF BECOMING BOTTLENECK "DEMOCRATIZATION" IN TURKEY IMPLIES VIOLENCE, POOR OUTCOMES, CHAOS. WE SAY A PHRASE "SPREADING OUT, MAKING THINGS ACCESSIBLE" see video for more DEFINITIONS ARE KEY...

ARI WORSE THAN A DUMPSTER FIRE; POSES AN EDUCATION-LEVEL THREAT for UXR ● A TROJAN HORSE POSING AS FAIRNESS for ALL, BUT IS COVER for DEVALUATION OF PROFESSIONAL UXR ● RESEARCH SHOULD BE A VALUABLE BUSINESS FUNCTION BUT IT ISN'T. ● IT HAS LIMITED IMPACT... INVISIBLE ... LOOK AT the LAYOFFS ● ... IS A SYMPTOM OF BROADER ROT. ● THERE ARE ISSUES NOT COVERED ● OPPORTUNITY COST FOR NON-RESEARCHERS DOING RESEARCH WORK ● GATEKEEPING... LIKE KEEPING NON-PHYSICIANS FROM MEDICINE... OPENING GATES IS SLIPPERY, MAKING CONCESSIONS RE: VALUE OF UXR THE VALUE ISN'T IN THE TOOL BUT THE RESEARCHER VALUE IS ABILITY TO SOLVE A PROBLEM ● ALSO, CONDITIONING STAKEHOLDERS ... TRAINING PEOPLE TO BEHAVE IN A CERTAIN WAY

REAL-WORLD SCENARIOS

#1 **ARI** Say you work at an org without enough UXR resources. The argument is someone is going to do research anyway. ● LET'S START WITH THE FIRST ORDER PROBLEM: the COMPANY DOESN'T VALUE RESEARCH ENOUGH to INVEST in it

ARAS ROLL BACK AND HIGHLIGHT THAT PEOPLE (LIKE ARI) WHO MAY BE AGAINST DEMOCRATIZATION ARE NOT HOARDING KNOWLEDGE and EXPERTISE. THAT IS a WRONG ASSUMPTION WE HAVE in the COMMUNITY.

ARI CALL OUT THAT THERE IS VALUE IN RESEARCHERS AS WELL AS RESEARCH – NOT MUTUALLY EXCLUSIVE. ● NEED TO TALK ABOUT UXR AS NOUN and VERB to ADDRESS QUALITY ● WHAT IS the VALUE? TACTICALLY IT IS THE ACTIVITIES (METHODS) WE USE, WHICH NON-RESEARCHERS CAN LEARN. OUR PRIMARY VALUE IS NOT METHODS BUT EXPERT RELATIONSHIPS WITH STAKEHOLDERS WE ARE INTERNAL BUSINESS CONSULTANTS WHO SOLVE PROBLEMS. SOLUTION IS TO REPOSITION RESEARCH IN THE MINDS OF COMPANY STAKEHOLDERS

ARAS AGREE... SIMPLE BUT NOT STRAIGHTFORWARD PATH TO IMPLEMENT ● TWO THOUGHTS ON THAT REPOSITIONING and TRAINING

#2 **ARAS** Here, a company is on the fence to hire UXRs but interested in methods. (not a company with existing budget.) ● MOSTLY STARTUPS... NEED TO FIGURE OUT HOW TO DO IT ● DEMOCRATIZATION HELPS HERE BUT NO WAY TO CHECK METHODOLOGICAL ERRORS; NEEDS EXTERNAL HELP, BUT REPOSITIONING RESOURCES in the COMPANY IS TRICKY ● SOME CASES UXR COMES IN TO MAKE COMPANY FEEL GOOD ABOUT MEDIOCRE RESULTS. ● GOAL IS to DISSEMINATE INFO, NOT MAKE MEDIOCRITY the NORM ● PUSH THE ENVELOPE – WITHOUT GUIDANCE, NOT POSSIBLE MOST IMPACTFUL APPROACH is Just Enough Research BY Erika Hall ● CHALLENGE NOTION UXR REQUIRES ARDUOUS APPROACH to LEARNING / EXPERIMENTATION

ARI Or another scenario where company might want to start formal methods but on the fence about professional researcher hire (when)

ARAS TO HIRE, NEEDS COMPANY AWARENESS RE: HIRING UXRs and POSITIONING THEM CORRECTLY for GOOD RESEARCH and OTHER RESEARCH INTEGRATIONS WHERE DO THEY SIT IN ORG? REPORT TO? ARI RESPONDS and the conversation continues...

– SEE VIDEO FOR MORE –

Women-Centric Research: The What-Why-How

Join me for a deep-dive course w/ non-negotiables bit.ly/wcd course

MANSI GUPTA
Founder, Unconform

10+ YEARS IN HCD on ♀ focused SOCIAL IMPACT PROJECTS — DESIGN × WOMEN
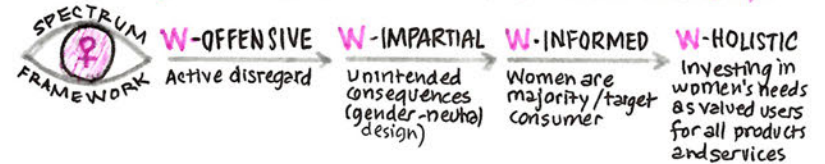
- RADICAL TRANSPARENCY as a design principle

Hello from Amsterdam! I am eager to share my story and my work with you.
In 2018, after many years working in women's impact fields, I reflected on what to do next.

What about the intersection of WOMEN + DESIGN RESEARCH?

- my projects showed the existence & persistence of similar barriers
  - We weren't learning from the commonalities and building on them
  - Women were being forgotten about

SO MY QUESTION BECAME

> ...male universality is also a cause of the gender data gap: because ♀ aren't seen and aren't remembered. [In] positioning women as a minority, women are set up to be forgettable
> — CAROLINE CRIADO PEREZ *Invisible Women*

How can we *not* forget about WOMEN?

[MANSI SHOWS REAL-WORLD EXAMPLES FROM TECH, FINANCE AND MONEY, INVESTMENT...]

HOW CAN WE BEGIN TO NOT FORGET?
I took this question to practitioners around the world...

COMMON THEMES / CONCERNS
- UXR not wide enough, not deep enough
- Clouded by dominant perspectives
- Anchoring on what exists instead of what could be

To uncover non-dominant perspectives:
What have you learned about (learning about) women and girls?

100+ interviews recurring topics...
NON-NEGOTIABLES
→ SAFETY
→ NON-LINEARITY
→ TRUST
→ COMMUNITY
→ ROLE of MEN

- "OBVIOUS" YET FORGOTTEN
- APPLICABLE BEYOND WOMEN (they open the door to more)

KEEP THESE CLOSE! ↗

What about women?
- BUILD **SAFETY** PROACTIVELY
- UNDERSTAND HOW WE HAVE BRED **MISTRUST** WITH WOMEN
- IDENTIFY THE PENALTIES DUE TO **NON-LINEAR** LIVES
- HARNESS THE POWER of **COMMUNITY**
- CARVE OUT A ROLE FOR **MEN**

CLIENTS SHARE...
- HOW DO I KNOW WHEN IT'S WOMAN-CENTRIC?
- WE DON'T NEED TO BE W-CENTRIC; WE ARE ALREADY

Let's imagine a different reality w/ women-centric eye

SPECTRUM FRAMEWORK
- **W-OFFENSIVE** Active disregard →
- **W-IMPARTIAL** Unintended consequences (gender-neutral design) →
- **W-INFORMED** Women are majority/target consumer →
- **W-HOLISTIC** Investing in women's needs as valued users for all products and services

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SAFETY — BUILD PHYSICAL & PSYCHOLOGICAL SAFETY proactively
81% WOMEN REPORTED SOME FORM OF SEXUAL HARASSMENT (GLOBAL)
#1 TOPIC is safe spaces — research w/ gender experts — fundamental human need

CONSEQUENCES	BENEFITS
- disengagement	- generosity
- disrupted peace of mind	- reciprocity
- discomfort	- support systems
- diminished access	- increased well-being

TRUST — DISCOVER the ORIGINS BEHIND
SYMPTOMATIC CONFIDENCE GAPS — ZEROING IN ON HOW SYSTEMS HAVE BRED MISTRUST w/ WOMEN

PERCEPTION/ SYMPTOM	REALITY/ ROOT CAUSE
- risk averse	- higher expectations
- lack of confidence	- harsher consequences
- imposter syndrome	- failed by the system

MANSI GIVES EXAMPLES

NON-LINEARITY
IDENTIFY the COSTS, BURDENS and PENALTIES SEEPED SO DEEP INTO YOUR PROJECT SPACE THAT THEY ARE NOW INVISIBLE

ROOT CAUSE IGNORED	INVISIBILIZED EFFECTS
- biological differences	- higher health-care costs
- gendered responsibilities	- time poverty
- information asymmetry	- lower purchasing power

ROLE of MEN — *where are the men?*
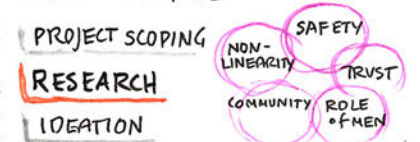CARVE OUT ROLES for MEN THAT LEAD TO DE-BURDENING and SHARING THE ONUS OF LEADING CHANGE

PART of the PROBLEM	PART of the SOLUTION
Design perpetrates TOXIC MASCULINITY while shrinking women	Practicing women-centricity includes men

NUMBERS, QUANT, EVAL and SPACE, TIME, BANDWIDTH: SEE VIDEO

PUTTING into PRACTICE
ACROSS LIFECYCLE
- PROJECT SCOPING
- RESEARCH
- IDEATION

(SAFETY, NON-LINEARITY, TRUST, COMMUNITY, ROLE OF MEN)

KNOWLEDGE GAPS
- FIT TO PROJECT CONTEXT (THEME)
  - What do we want to learn about...?
  - HMW understand non-linearity?
  - HMW identify invisible costs, etc?

INTERSECTIONALITY
- DIFFERENT IDENTITIES / LIVED EXPERIENCES
  - How does safety change?
  - How does non-linearity change?

METHOD
- REFLECT ESSENCE OF THEME
  - What could safe method be?
  - How might method work with non-linear lives?

@advancing resrch #AR2023
29 March 2023

What Would Emmy Noether Do?
"NER-ter"
Math, Models, and Mulling in UX Research

WWEND?

JENNIFER FRASER
Experience Design Consultant

"Remember, always, that everything you know, and everything everyone knows, **IS ONLY A MODEL.** Get your model out there where it can be viewed. Invite others to challenge your assumptions and add their own."
— DONELLA MEADOWS

I USE THE IMAGES of EMMY NOETHER'S STORY are from a WONDERFUL BOOK GIVEN TO ME by SCOTT PLEWES (Day 2 speaker on mathematical models)

Emmy Noether

- BORN into a JEWISH FAMILY in GERMANY in 1892
- HER FATHER WAS a MATHEMATICIAN
- AT AGE 18 SUPPOSED TO TEACH ENGLISH and FRENCH but *Instead* DECIDED to STUDY MATH at UNIVERSITY of ERLANGEN

But women were not allowed to attend university

THROUGH HER FATHER'S CONNECTIONS SHE COULD SIT IN ON LECTURES but NOT TAKE TESTS OR GET A DEGREE *eventually*

THAT CHANGED and SHE GOT HER DEGREE

EMMY NOETHER The Most Important Mathematician You've Never Heard Of by Helaine Becker Illustrator: Kari Rust

But women weren't allowed to TEACH. SHE WORKED **WITHOUT PAY** for **7 YEARS.** IN 1915, BECAUSE OF HER EXPERTISE IN ALGEBRA, SHE WAS INVITED to JOIN the DEPT. of MATHEMATICS at the UNIVERSITY of GÖTTINGEN by **DAVID HILLBERT** STILL UNPAID, HER LECTURES WERE "ADVERTISED" UNDER HIS NAME But IT WAS **HERE** THAT SHE WAS ASKED to HELP SOLVE an ISSUE with

Einstein's Theory of General Relativity

THE PROBLEM: When numbers were put into his theory, energy seemed to be disappearing. THAT MEANT IT WASN'T FOLLOWING the CONSERVATION of ENERGY PRINCIPLE. **HILLBERT** HAD BEEN WORKING WITH EINSTEIN ON THIS. **HILLBERT** ASKED NOETHER TO HELP... HER ALGEBRAIC SPECIALTY *is* KNOWN AS **INVARIANTS**

HER APPROACH was *Different* THAN HER COLLEAGUES

she STARTED by LOOKING at **LARGER PATTERNS**

SHE ZOOMED OUT and DISCOVERED the **SOLUTION**

SOLVING this PROBLEM MEANT EINSTEIN COULD PROCEED IN SHARING HIS WORK WITH A LARGER AUDIENCE *Her contribution was largely unrecognized*

BUT IT DID LEAD to DEVELOPMENT of

Noether's Theorum

CONSERVATION LAWS	SYMMETRIES of NATURE
MATH	PHYSICS

UNCOVERED LINK

WHY THIS STORY IS IMPORTANT
1. STEP BACK and LOOK at the BROADER SYSTEM
2. SEEK A BRIDGE BETWEEN DISCIPLINES

EMMY'S LESSONS

Today IN OUR OMNI-PRESENT NEED for **SPEED** AND ALL THAT FUELS IT

THERE ARE THREE THINGS WE TEND TO IGNORE:

- **WHAT IS THE SYSTEM?** What are we working within? Seeking to understand and impact? WHY?
- **WHAT ARE THE WAYS OF LOOKING?** What are the different ways of modeling the system?
- **WHAT IS THE BRIDGE?** Between different ways of modeling...

ECOSYSTEM MAPPING
TOOL for MODELING and DISCUSSIONS
- STAKEHOLDER ALIGNMENT
- STRENGTH and WEAKNESS INSIGHTS; AREAS for IMPROVEMENT

MAKES the INVISIBLE VISIBLE A depiction of ANIMATE OBJECTS, and PHYSICAL / ABSTRACT OBJECTS IN A BUSINESS CONTEXT where their RELATIONSHIPS represent VALUE EXCHANGE (connections)

ALIGNING HELPS TRANSFORM SYSTEM CURRENT → FUTURE STATE

RELATIONSHIPS within SYSTEM — flows within the ECOSYSTEM { JOURNEY MAPS / SERVICE BLUEPRINTS

THESE APPROACHES are COMPLEMENTS

HOW WE UNDERSTAND A PROBLEM

Real World (SYSTEM) — CHOOSE & EXTRACT — Data — ANALYZE & SYNTHESIZE — MODEL — PREDICT INSIGHTS
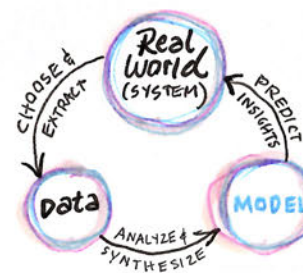
Ecosystem mapping...
SUPPORTS BRIDGING DISCIPLINES BY CHALLENGING ASSUMPTIONS and EXPOSING BIAS

JENNIFER WALKS THROUGH A REAL-WORLD PROJECT AS AN EXAMPLE

UX IS CURRENTLY SILOED FROM DISCIPLINES LIKE DATA SCIENCE, which doesn't make any sense.

The Art of Extrapolation
Reclaiming Secondary Research as a Superpower
FOR ITS RIGOR, ETHICAL IMPLICATIONS, and ACTIONABILITY

CARA MARITZ
Senior UX Researcher
SYDNEY, AUSTRALIA   Atlassian

RACHEL NY
Senior UX Researcher
SAN FRANCISCO, USA

I ALSO HAD A WIN FOR SECONDARY RESEARCH... MY work helped define STRATEGY for a key initiative... now other teams want it too.

Started chatting to → FOUND OUT SHE WAS HAVING SIMILAR EXPERIENCE 😊

wow! This...?!?

Some BACK STORY... and how we got here.

CARA 📍 REACHED A POINT WHERE I WAS OVERWHELMED

✗ WASN'T MAKING THE MOST OF DATA I COLLECTED (All Primary Research)
✗ NOT SITTING WITH IT LONG ENOUGH TO INTERNALIZE VOICES OF CUSTOMERS

I FELT I WASN'T DOING ENOUGH... *INTERVENTION NEEDED*

Time to make a change   ° ° *pause*

STRUCTURED INTO

DATA CONSOLIDATION
EVERYTHING on HAND

ORG-WIDE including
SUPPORT TICKETS   UNSTRUCTURED SURVEY DATA   INTERVIEWS   ANALYTICS

SUCCESS
→ **IMPACT**
• WENT VIRAL in ORG
• WIDE READERSHIP
• INFORMED PRODUCT STRATEGY

SECONDARY RESEARCH REPORT

DELIBERATE FRAMING to be ACTIONABLE

• **ETHICAL** RESPECTS the CONTRIBUTIONS of PARTICIPANTS

• **SHAREABLE** REDUCES RISK of 'KNOWLEDGE' SILOING; PURPOSE-FULL COLLABORATION AVOIDS DUPLICATIVE EFFORTS in ORG.

• **EFFICIENT** REDUCE RECRUITMENT BURDEN; MINE EXISTING DATA for VALUE (INSIGHTS and RECOMMENDATIONS)

• **LOWER BARRIER to ENTRY** POWERFUL MEANS for UPSKILLING/ RE-SPECIALIZING; FRUITFUL WAY TO UNDERSTAND END-TO-END BEST PRACTICES.

LEVERAGING WORK YOU HAVE NOT PRODUCED YOURSELF for a project [OUR WORKING DEFINITION]

CHALLENGE YOUR DEFINITION By leveraging and triangulating diverse data across your org, you can ethically and efficiently generate **POWERFUL INSIGHTS**

INTERNAL REPORTS   THIRD-PARTY RESEARCH   etc.

UNSTRUCTURED DATA from live streams: TICKETS ANALYTICS (and more)

3 NOT ENOUGH TIME
• PERCEPTIONS THAT SECONDARY WORK IS a **PRECURSOR** TO PRIMARY DATA COLLECTION → A DETOUR FROM "THE REAL STUFF"

POSITION SECONDARY RESEARCH AS BEING:
• **TIME-SAVING** Less time collecting primary data. More time for deep analysis
• **COST-EFFICIENT** Get the most value from existing data and research

IT **STARTS** *with* OUR **OWN PRACTICE** WHICH WE CAN **EVOLVE** INTO A STANDARD WE UPHOLD TOGETHER

COMMON OBSTACLES

1 STAKEHOLDER (MIS)CONCEPTIONS
• LESS RIGOROUS
• NOT APPLICABLE
• LESS "ACTIVE"
→
• PRESENT and ELEVATE DATA DURING PROJECT PROPOSAL
• HIGHLIGHT the PROPOSED OUTCOME
• TIE OUTCOME TO STAKEHOLDER NEEDS
• ALLOW STAKEHOLDERS ACCESS TO DATA

2 LIMITED ACCESS to DATA & LACK of STORAGE INFRASTRUCTURE   SEE EXAMPLE of CENTRALIZED REPORTING
• NO RESEARCH OR INSIGHTS CENTRALIZATION
• HIGH VOLUMES OF DATA
• UNCLEAR OWNERSHIP of DATA & RESEARCH OUTPUTS
→
• START a REPO THAT WORKS for YOUR TEAM and ORG
• STREAMLINE DATA INPUT PROCESS
• COLLABORATIVE EXERCISE
⚠ INITIAL BURDEN ON RESEARCHER

FRAME as LONG-TERM INVESTMENT

4 POOR COLLABORATION
• DIFFICULTY IDENTIFYING POTENTIAL COLLABORATORS
• LACK of COLLABORATOR BUY-IN
• POOR COMMUNICATION
→
• BUILD RELATIONSHIPS EARLY
• LEVERAGE AN ADVOCATE into RELATIONSHIPS
• CLEARLY PRESENT REQUESTS
• SHARE CREDIT WHERE IT'S DUE

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29 March 2023

IN THIS PRESENTATION VICTOR CHOSE to COMBINE HIS PERSONAL, CREATIVE, and PROFESSIONAL WORLDS TO SHARE KNOWLEDGE THROUGH an ART FORM (AESTHETIC KNOWLEDGE). AS LISTENERS OUR EXPERIENCE GOES BEYOND HIS EVOCATIVE SPOKEN WORDS TO AN UNDERSTANDING THAT MANY WAYS OF KNOWING EXIST and DESERVEDLY AWAIT OUR ATTENTION.

Research in the Pluriverse

There are DIFFERENT UNDERSTANDINGS or DEFINITIONS of what we call RESEARCH and DESIGN in DIFFERENT COMMUNITIES AROUND THE WORLD

VICTOR UDOEWA
Chief Experience Officer & Service Design Lead, NASA

I SIT AT the INTERSECTION of VARIOUS IDENTITIES, SOME of WHICH PLACE ME IN a POSITION OF PRIVILEGE and SOME IN a POSITION LACKING PRIVILEGE.

In a PLURIVERSAL World, a world of many centers, Coloniality and Colonialism have no place. Our mama is said it best.

searches re-searches for a WARM EMBRACE a welcoming space

ANY ONE WAY OF BEING THAT CANNIBALIZES the OTHER WAYS, IN THIS CASE - COLONIALITY - DOES NOT SUPPORT the LIFE-GIVING PLURIVERSE

THERE IS NO GOVERNING METHODOLOGY or AXIS only PRESENCE and PLACE and RELATIONSHIP and PRAXIS

So we lived and hoped... AND THEN ONE DAY A COLONIAL RESEARCHER STEPPED OUT (and lost their job as a result) "I will not do extractive work nor support a system dismissive of people in this way."

over time CHANGE

SLOWLY, THERE WERE MORE

WE STOOD OUR GROUND and SURVIVED ANOTHER DAY

THEN THEY SEEK the FAME STAKE a CLAIM "DISCOVERING" OUR BEING PIONEERS the PATH without naming

FROM the MOUNTAINS CURRENTS of CHANGE to the SEVEN SEAS... FROM CONSTANT to the MARSHES to FORETELLING of WISDOMS PAST... ...the LORE of FOLK

surprises and SURGES

A WIND ARISES - no - escapes

Let me tell you about a time when Story was WOUNDED...

IN the DISTANTLY NEAR PAST THERE WAS A TIME WHEN PEOPLE VASTLY PREFERRED *TRUTH* OVER *Story*... CLAIMED to KNOW ALL THINGS LIKE:
• The SELF as separate
• SCIENCE as King
• ECONOMY as God

causing anaemia

RISING ACADEMIA

Judging, rejecting

ways of
• KNOWING
• BEING
• SEARCHING
• RE-SEARCHING

thoughts

ONLY ONE UNDERSTANDING

KNOWLEDGE Only mainstream & institutional

RIGOR Conformity to Western methodologies

that were Different

X papers NO

THE UNIVERSAL ORDER DOMINATED OVER PLACES

RESEARCH became A JOB and A PROFESSION

FLATTENED to 2 DIMENSIONS
☑ ESTABLISH A FACT
☑ REACH A CONCLUSION

It was this illusion that SUBJUGATED Story that LIMITED

RESEARCH | METHODS | ANALYSIS | SYNTHESIS

And yet there... we... were living a better story. Reworlding and Re-storying communities and indigenous communties still practicing a different way of knowing

TELL ME A STORY that will TEACH ME and REACH ME again and again...

I SHALL GIVE YOU a STORY ABOUT STORY

Little IMA

EKAETTE Grandmama God Knows

FACTS = TRUTH

...FRAMING that TOOK the ♥ and MEMORY of RESEARCH away from herself FORGETTING from WHERE SHE CAME

We were translocal and

LIVING OTHER TYPES of KNOWLEDGE:

Lived Experiental Knowledge IN OUR LIVING, BREATHING and BEING

Relational IN BETWEEN YOU and ME, ROCKS, LAND, and SEA

Embodied IN OUR CARNAL, CORPOREAL SELVES

Intuitive IN OUR MINDS

Energetic IN OUR MOVEMENTS, BODIES, OLD & YOUNG

Spiritual IN OUR STORIES, POEMS, FABLES, and TONGUE

Aesthetic IN OUR ART-MAKING and ART-SEEING

Community & Cultural IN OUR PRACTICES, LANGUAGES, and RITUALS

These knowledges are always ahead of mainstream institutional knowledge for EXPERIENCE

HAPPENED and Knowledge WAS NO LONGER FLATTENED

Research COULD BE ANYTHING THAT...
• GATHERS
• STORES
• ORGANIZES
• TRANSMITS
• ANALYZES
• SYNTHESIZES
• COMMUNICATES
• COMMITS
• IS KNOWLEDGE
(was always but finally became)
• RELATIONSHIP
• SHAMANS
• STORYTELLING
• FABLES, POEMS
• CONVERSATIONS
• SACRED HOLDING RITUALS

LEGACY LEAVING
SYSTEM STEWARDSHIP
HERITAGE PRESERVATION
SURVIVAL
MORAL EDUCATION
LOVE EMBODIMENT and EXPRESSION

REWORLDING: TO RECONSTRUCT THE WORLD - or - ATTEMPT to SEE IT DIFFERENTLY

IMA is a SHORTENED VERSION (NICKNAME) FOR "GOD'S LOVE" (IMAOBONG)
EKAETTE MEANS "GRANDMA" IN IBIBIO, a NIGERIAN LANGUAGE IN the SOUTHEAST