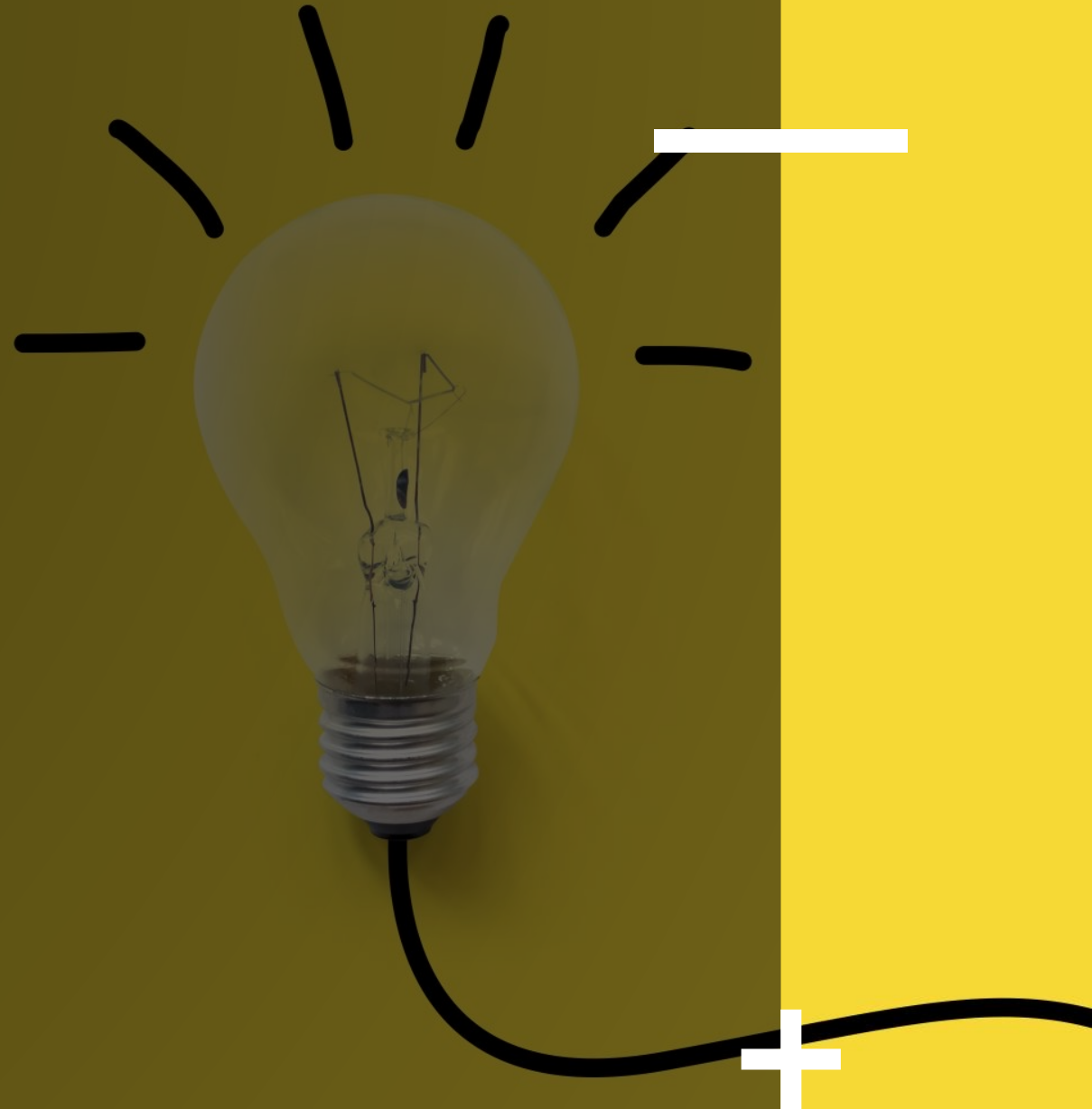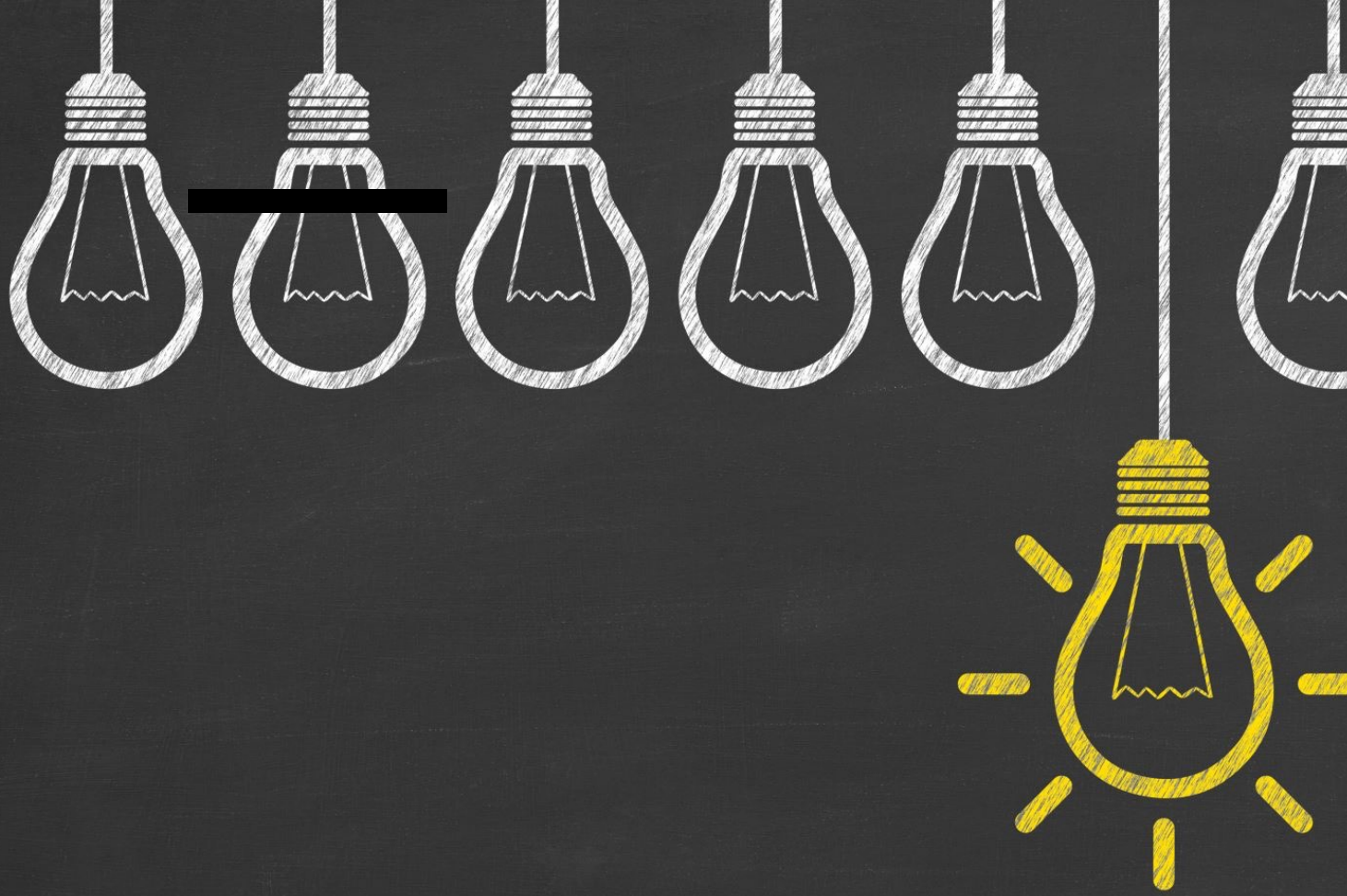# Capturing Deep Insights

Tony Turner

How do we capture deep insights?

- Long term research

- Connecting different research findings across studies

- Bridging seemingly unrelated studies

- Communicating across company silos

How do we accomplish all of this?

– Knowledge repositories
- – Tools for connecting various research findings across time, personas, domain, product, features, and design paradigms
- – Taxonomy system used to find those connections
- – Inspires communication across silos

Value of knowledge repositories

- Storytelling
- Facilitating discussion
- Research reporting
- Research organization
- Employee training
- Innovation and idea generation
- Idea validation
- Understand and enhance cross-channel and cross-product experience
- Less digging
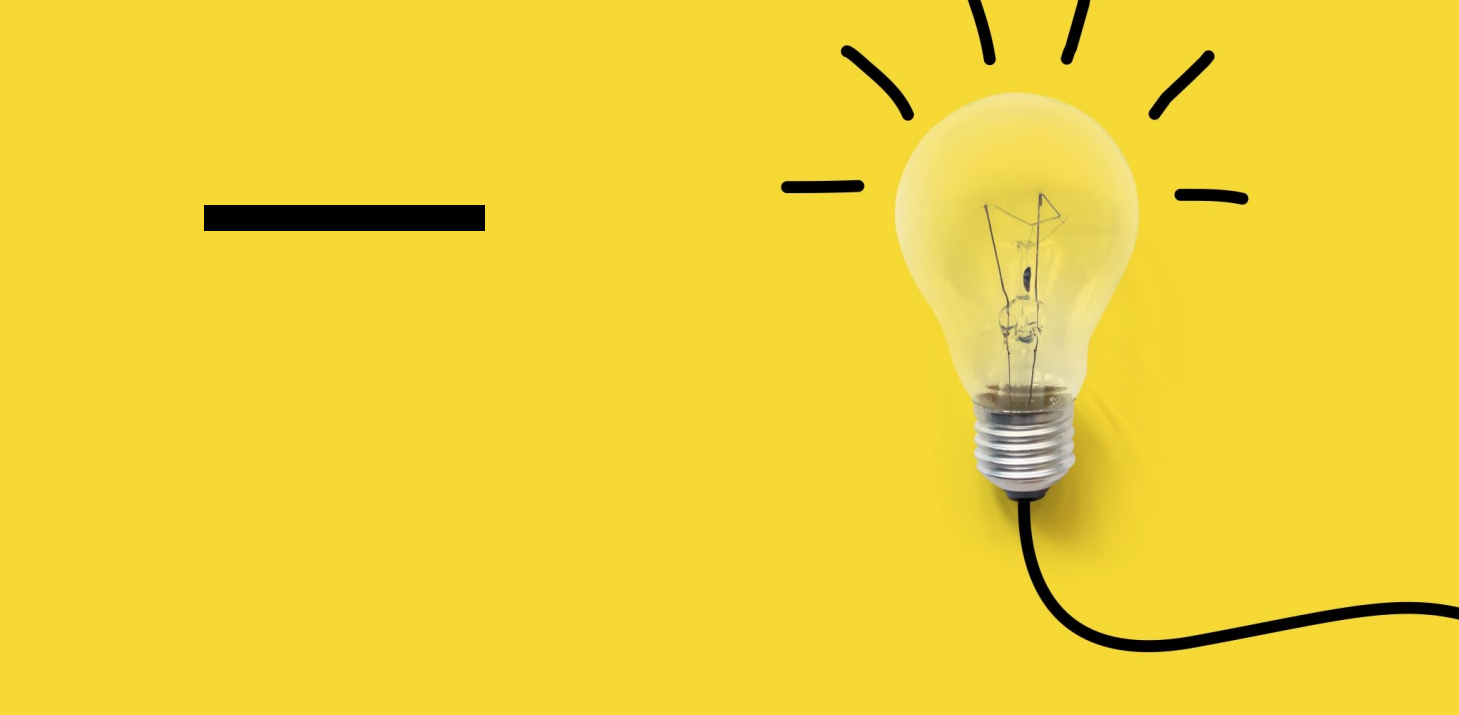
Storytelling

Sell value of finding to stakeholders

– Help people develop empathy for end users

– Effectively describe and visualize the end to end user journey

Facilitating Discussion

Tear down silos

– Share deep knowledge

– Help stakeholders learn from one another

Research Reporting and Organization

Consistent reporting structure

– Easier to find relationships

– Simpler archival and retrieval

Employee Onboarding

New employees quickly get up to speed on projects and products

– Opportunity to combine their fresh external knowledge with previous research to produce innovative ideas

Innovation and Ideas

Serendipity from seeing findings across different studies
– Innovation given particular constraints of personas and contexts
– Idea generation
– Idea validation

Cross-channel and cross-product experience

Understand relationships user have with products across different channels

– Understand how users interact with different products within your ecosystem

Taxonomy is the strategic key

– Must get this right. No pressure.

– Tags must be relevant to user goals, needs and issues

– Tags shouldn't be consistently altered, added or removed

– Research reports must have similar content structure within a particular methodology

– Teams must be trained on the taxonomy and content structure

– Three levels: Label, Tag, Property/Value

Taxonomy: Label Level

– At this level you want to make the repository searchable at a high level by stakeholders.

– Business units, customer segment, and methodology are examples

Taxonomy: Tag Level

– At this level you want to outline metadata on findings.

– That metadata can include the items you defined at the label level but will get more nuanced and start to include items that be used to describe specific studies

– Should be things that don't change much

– Examples include: Product name, persona, version, prototype fidelity, channel

Taxonomy: Property/Value Level

– At this level we define property/value pairs that relate to more specific details of the research

– These property/value pairs can be vast and deep. This is where there is more freedom in categorizing the research but we still need to be careful that we don't duplicate properties as much as possible

– Examples include
  – Property: Gestalt Principle; Value: Similarity
  – Property: Mental Model; Value: Managerial
  – Property: Environment; Value: Office

Knowledge Repository Tool Options

EnjoyHQ

Aurelius

Condens

Dovetail

Consider.ly

Our Implementation

– Positioning with leadership

– Procurement process and POC

– Getting feedback from stakeholders

– Getting feedback from user research team

– Implementing the solution

– Additional Learnings

Leadership and POC

01

Present value

02

Present tools to evaluate

03

Present plan for testing solutions with criteria for success

04

Get demos. Include leadership when possible

05

Test chosen solution and get feedback

Gathering Feedback

– Feedback from stakeholders

– Feedback from user research team

Implementation and Success Story

– Populating the tool

– Taxonomy governance

– End-to-end customer experience learnings

Questions?