

Finding themes in research data

Fundamentals

An insight is a provocative statement of truth about human behavior.

Experience

The things and pressures on people that define and shape their interactions

Emotional Insight

Finding meaning in data by looking at it from the perspective of people

Narrative, Stories & Value

Stories of how a person can achieve their goals, and the value they get from an experience

Empathy

Fundamentals

It's the “big-rock” upon which we'll anchor new product capabilities.

Experience

The things and pressures on people that define and shape their interactions

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Narrative, Stories & Value

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Empathy

A bridge to insights

Our research data is neutral: it's what really happened, without our interpretation.

It's our job to move from the raw data to something useful for design. But it's hard to identify insightful things in research data.

We'll use a methodical, thoughtful process to translate our research data into insights. We'll start by finding *themes* in the data.

A theme can be:

- A behavioral tendency that we see
- A type of emotional reaction we sensed
- A sentiment that we heard expressed

A theme doesn't have to show up over and over; even two or three similar thematic expressions is enough.

Finding themes in research data

Start by creating a 1:1 written representation of your participant data.

We'll use a transcription as our base set of materials for creating themes. Transcribe the research verbatim: write down every single thing that was said. *Exception: remove verbal ticks ("uh", "uhm"), as well as interruptions from outside sources that aren't relevant.*

Try transcribing by hand yourself, and reflect on how solid your understanding of the data becomes.

- Plan your time: transcription takes approximately 4 times as long as the actual research for a fast typer!

Try using an online service like rev.com, and think about the tradeoff between speed and tacit understanding.

- Plan your budget: transcription services cost \$1 a minute for a slow return time.

Don't let your research build up; a backlog of transcription is **terrible** and intimidating.

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Pursuing his MBA at University of Texas

My father was an attorney, so it was always on my radar; even though he said, jokingly, you can be whatever you want, just don't be a lawyer.. He just, it's a lot of hours, later on he realized that we had similar minds and he thought it would be good and he supported the decision. But it was a running joke growing up.

So undergrad, I had no idea what I wanted – I started as actuarial science, I was always into math, and I took a class called the mathematical theory of interest, and I – they said this is the core building block of being an actuary, and I hated it. I took a year off, and that's when I moved back to Houston, and that's the first time I started working at a law firm in Houston.

When I came back to undergrad at UT I switched to economics. When I graduated I still wasn't sure; I went back and worked three more years, and then applied for the – took my LSAT, and applied, and ended up back here at UT.

Its .. it was good to get real world experience, I mean, the job I had at the law firm was a dead end law job, I thought I would go back to school and not be working a dead end job. And then also, working – working at a law firm for several years has put me ahead of the curve when starting law school. That was beneficial. And living on my own, and making money, paying bills, is valuable life experience.

I remember back in fourth grade, we had to give this speech, everybody did it in front of the school, they recorded you, and it was what do you want to be when you grow up. Which is a stupid topic for fourth grade. I had no idea, my dad's a lawyer, I'll do that speech, and I was a finalist for the contest. I don't know, I did the soul searching after I realized that actuarial science was not going to work out. I took the year off, took a bunch of those – not myers briggs, but the other tests you take that show you what profession you should – that your personality is a fit for, and lawyer was one of my top results.

I always loved having intellectual debates with my dad... Nothing, anything can become a debate. If you are going to try to argue and win, you have to come prepared. He won't let you off easy. Anything; from where to each dinner, and extending curfew when you are a kid, increasing allowance for cutting the lawn, anything like that. You can't just make a demand, you have to have a reasonable argument to back it up. I still wasn't sure; it was working at a law firm and working with attorneys, yeah, this is something I think I can do.

Going to school it was always known that my parents would pay for college, very fortunate for, most people don't have that opportunity. But anything after that, that's on you – so I knew going into law school, my brother is an optometry, he took off loans for that and I knew wherever I was going to go for law school, I was going to take out loans for that.

So, I mean, UT – that was .. laying the benefits, vs getting a scholarship or going to a more prestigious scholarship, taking out more loans.. and kind of weighing those options. And UT out of the schools I got into, was one of the better ones, and offered me scholarship money. It was cheaper than most law schools, not by much, but 10k cheaper per year.

Just looking at the tuition of other schools I had been accepted to, and then – it's 10,000 cheaper, and they gave me, I think, scholarships and grants, another 12000. All that together, a highly ranked schools – and that's a selling point, ROI – best bang for your buck. With starting salaries and the percentage of people that find jobs, weighed over cost, it's the best deal. It's the number one ranking, and that's something when you are applying they put everywhere. I came here for undergrad, I loved Austin, and it all made sense.

I have two older brothers. I'm the baby, the one who is an optometrist is born in 1982, he's 33 now. I have another brother who is 18 months older, he's 30. As far as the loans thing, there wasn't too much of a conversation. It was always understood that if you go to graduate school, you are paying for it. Loans were always going to be that; I don't know, it was more of a conversation of going to law school, but even that after I was working at a law firm for a few years, it wasn't a surprise to anyone. It was a gradual progress. Everyone knew I was going to. How many years will I procrastinate and put it off?

That was the scary thing – how easy... I felt like it was like 5 clicks of a mouse, and I had taken out over 100000 in loans. It kind of was, it creeped me out a little, how quickly they gave me the money. It was like, oh, I've been accepted to law school. I need loans; ok, click a few things, and boom – here's your loans. I dunno; that was my feeling of it. It was very easy. Too easy. It made me a little cautious; ok, I can see law school is a good graduate program – I should have no problem paying back my loans, but it was very simple.

I didn't have any expectation; I don't know. I just remembered after I feel like the whole process took 10 or 15 minutes, and I was like, that quickly it sank in, ok – now I'm on the hook for a lot of money. I don't know; I just remember having that thought, that was – that was a lot more simple than I was thinking it would be.

I guess that was after I received, I got accepted into certain law schools, then you – I think that's how it works – I choose to go to UT, then I applied for federal loans, clicked a few buttons, and was done.

I'm sure at that point – that's when my dad was sick, he passed away right around there. I'm sure I asked him or my mom to double check if it was right, but it was very simple.

It was all on the computer. I didn't have to talk to a single person. Click click click, ok, here's your money. When you asked, what was the process – I think it was after I was accepted, but the fact of the matter was that it was so simple and easy, I don't remember too much about it, I did it real quick and that was it. It's wasn't a big thing, so it was a blur in my memory.

I was looking at tuitions of the different law schools, to roughly calculate how much I would be taking out, weighing after my scholarship, easily 20000 cheaper than another school, without any scholarship.

I think I got the dean's scholarship, which is 7500, and another 5000 in grants. Which I think I may have applied for, financial assistance, which is how I got that. But again it was clicking a button, apply for financial assistance, this is how much I make, I'm getting no assistance from my parents, click a couple buttons and it just went through.

Each semester, I'm paying for tuition online; I click a button, paying with financial aid, student loans, and that automatically goes through and whatever is remaining is direct deposit into my account. Just like any job where you put direct deposit information, it was the same thing. I remember doing the couple

questions for this thing, and was like, how much in loans? I was like, 120 and 150; I know it's a lot, but it's out of sight, out of mind, and I know I have to deal with this sometime, but right now it's just a lot of money in my future that I have to deal with.

I'm graduating in May. It's coming up now. It's starting to feel real.

I didn't know the exact figure, I knew it was 120-130, and I printed this out just now, and it's 129. So that's pretty much what I thought. This is from, I didn't have the paperwork, I think the formal paperwork is at my mom's house.

But they send out emails, nelnet.com, and I created an account and it has all my information.

I mean, I guess the thing that stood out to me – I just printed this right before you knocked on the door, so I haven't reviewed it... it's all this group a, b, c, d, I guess they have different principles, and different interest rates. Why – it's not just one lump sum with one interest rate. I don't know if these are broken out by semester; I don't know. That was my first thing, kind of – look more into what is the difference, why are there 9 different groups, why are there different interest rates, different principles, and some have deferment, some have in school. When I printed this out, I was like – ya, there's a lot I need to look at.

I really, when I think Eric emailed me and said we want your loan information, I said oh shit, I just found it, printed it off, and didn't have time to look into it. It's through the department of education, they are partnered with the website, I'm sure there is plenty of information explaining everything.

It's a little scary. My name is tied to \$129,000. I mean, it's not shocking – I knew that's what I was getting into, I mean – it's what I signed up for. It's a little daunting, seeing that big number, it takes money to make money. It's an investment. I'm investing in myself, is kind of how I see it.

It's very competitive to land a big law firm job. That might not even be possible. I know everyone who works those, as a young associate, they just grind you down. You work long hours, and it's just miserable. To be honest, they pay a shit ton. I would be miserable for a few years just to pay a huge chunk of this debt off; money, it's a motivation – money is a factor initially, I mean – eventually, it's quality of life over everything else. But when you see this number, I mean – take a job, you might not like, to make more money, to get rid of the debt and move on to something you want to pursue. It's kind of in the back of my head. Find a job to make more money, and then go from there.

I haven't put much thought into this until I printed it off; I know – I wrote a paper in law school about for profit colleges, and how most of them are scams, and they promote themselves as being cheaper than regular college but they cost the same amount; in doing research for that – student loan debt is the second highest debt in the country next to mortgages. If it's that much money, teams of people got together and figured all this shit out.

I haven't taken the time to think about it. When I see group a, b, c – there's a lot of questions. Somebody came up with it; it could be group a is the first semester, I don't know. I'm definitely going to look into that, and it's a little odd.

Right now I'm at a part time firm. There's a possibility that could be a job, but it's a little three man job. The starting salary is probably in the area of 60k, and that seems a little low. The average UT graduate is somewhere around 100, and the big massive firms that work you to death pay about 180 starting. But

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That was the scary thing – how easy... I felt like it was like 50000 in loans. It kind of was, it creeped me out a little, but like, oh, I've been accepted to law school. I need loans; ok, ok, ok. I dunno; that was my feeling of it. It was very easy. Today I see law school is a good graduate program – I should have no idea how very simple.

I didn't have any expectation; I don't know. I just remembered after 10 or 15 minutes, and I was like, that quickly it sank in, ok – now I'm on top of it; I just remember having that thought, that was – that was a lot of things to think about.

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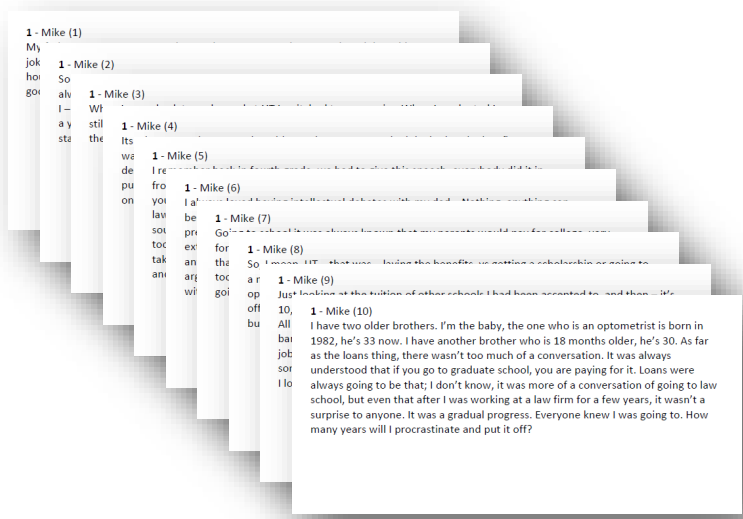
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Begin to identify themes in the data.

Now, we begin the process of **sensemaking**.

The goal of this data-explosion and pattern-identification is to build knowledge—to create a shared, tacit sense for what happened in the research.

A “bottom-up” approach means letting the notes indicate the groupings, rather than starting with grouping names.

Finding themes in research data

Compare utterances and find inferred meanings.

Theme: **Vehicles carry sentimental meaning.**

1 - Matt (line 15)

My dad drove a red truck, so that is why I drive one today. It reminds me of him.

4 - Sharron (line 44)

Every time I see a red truck, it reminds me of the hot-wheels toys that my brother and I used to play with.

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Avoid the urge to group based on simple categories.



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Theme: **Red trucks**

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I'm addicted to technology. I'm on it 24/7. I try not to be on it during social situations, with like family, because I think it's rude. I know that teenagers have that stereotype of being so addicted, and I am, but I don't like to be the typical "on facebook all the time."

3 - Peter (line 17)

I couldn't get into any of my required classes. It didn't seem fair; there were a few sections, but they filled up in minutes.

11 - Mary (line 24)

I don't get a lot of help in registering for classes. All of the upperclassman seem to get them first.

11 - Mary (line 46)

I'm a teenager, but I can be an adult if I need to. Teenagers don't get listened to that often - they only care about their social life and what not, but I know when to put social life away. I have to know when to disengage from the social stuff like drama, it's not going to consume my whole day.

1 - Matt (line 19)

When I was first looking up what I wanted to do [before switching to business] I was searching careers in business. I searched administrative assistant and stuff - my mom talked about that - she said there is so many job for this.

11 - Mary (line 25)

I think getting an A or a B - keeping on the deans list - having above a 3. something - I have a 3.6 right now and If I fail this class [calc] it will all be for nothing. It will make my GPA plummet. I'm working so hard and I'm not getting good results. It makes me feel not good about myself.

1 - Francine (line 24)

It's sad that social life is all about technology. I like to try and communicate without it - so I don't end up like those people who cant communicate in person. I guess I learned a lot of that from my mom because she points that out to me.

3 - Peter (line 44)

I haven't discovered what I'm passionate about. It's disappointing. I've discovered the things that I'm not passionate about, so I guess that is good. Next semester I'm taking my first marketing course, so I hope that ends up well.

1 - Matt (line 35)

I do my homework in the student learning center at the library. I also go to my prof office hours and stuff. I tell them I'm working hard, but sometimes it doesn't click for me

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Can you infer a meaning in the statement?

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How about these two?

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Write a connection statement (an observation) that ties the notes together.

Your connection statement is an inference.

Select the inference that feels most suitable, that captures the intent of all of the notes you've selected, and that has the most salient connection between them.

Associations are not obvious. They aren't "keyword matches" or explicitly stated by the participant; you will have to make a leap, with incomplete data.

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Theme:
There is a stigma associated with forming digital connections, as compared to physical ones.

...about technology. I don't want to be without it - so I don't want to communicate a lot of that from my phone. It's not out to me.

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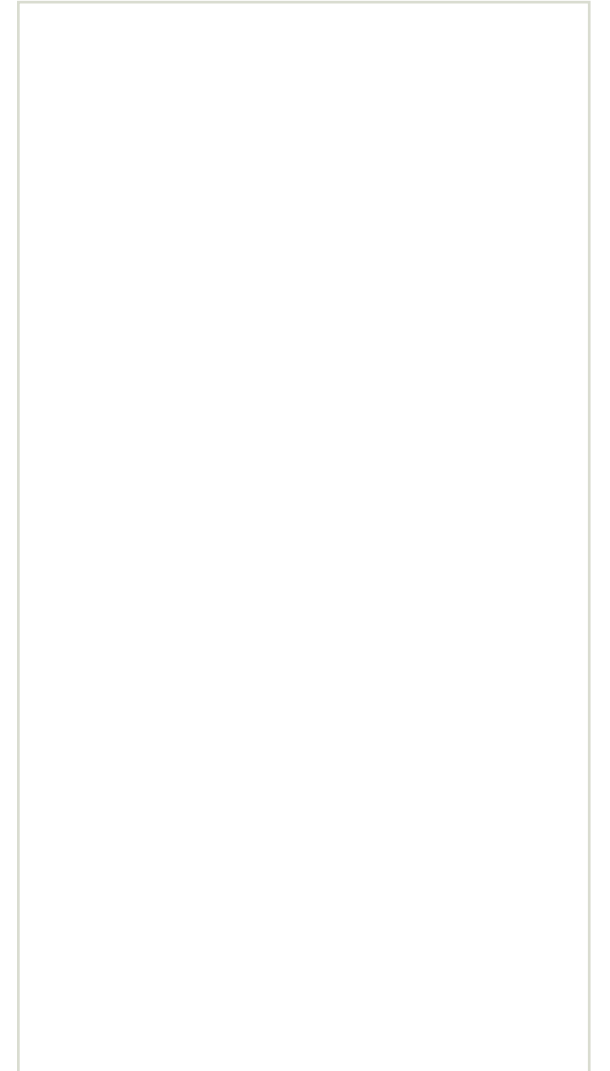
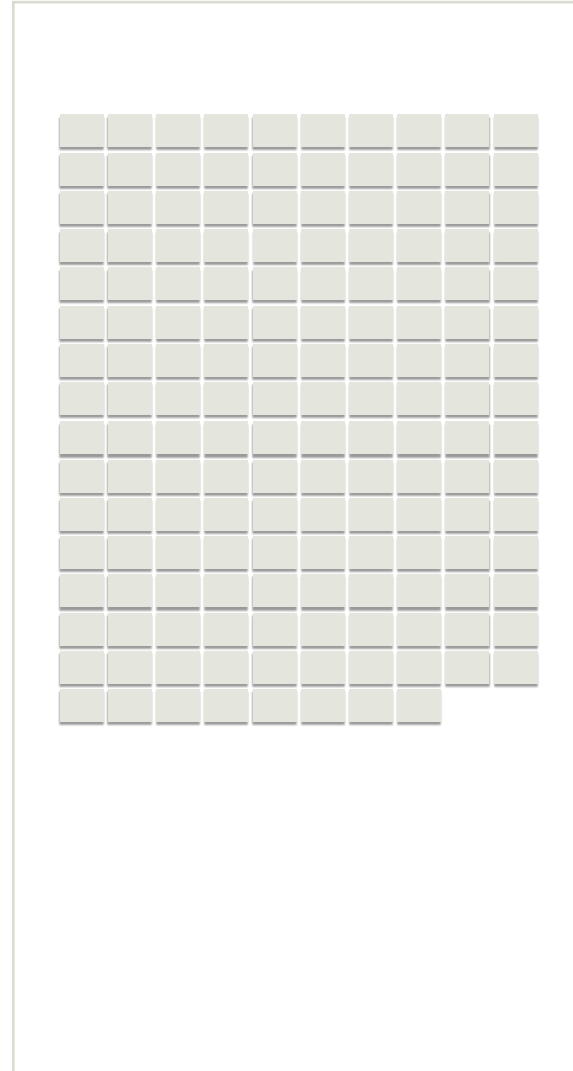
<p>1 - Matt (line 15)</p> <p>I'm addicted to technology. I don't want to be on it during family time. My teenagers have that stigma associated with forming digital connections, as compared to physical ones. I'm addicted, and I am, but I don't want to be "on facebook all the time."</p>	<p>1 - Francine (line 24)</p> <p>Theme: There is a stigma associated with forming digital connections, as compared to physical ones.</p> <p>... about technology. I don't want to be without it - so I don't want to be without it. I can't communicate a lot of that from my phone. It's not out to me.</p>
<p>3 - Peter (line 17)</p> <p>I couldn't get into any classes. It didn't seem fair; there were a lot of people who they filled up in minutes.</p>	<p>11 - Mary (line 24)</p> <p>Theme: Educational institutions plan their course offerings around logistics, rather than student need.</p> <p>... registering for classes. I want to get them first.</p>

Finding themes in research data

How to get to themes:

Post all of your data on a wall, unorganized, for review.
Intermingle participant utterances. .

Leave one wall blank. This will contain your groupings.



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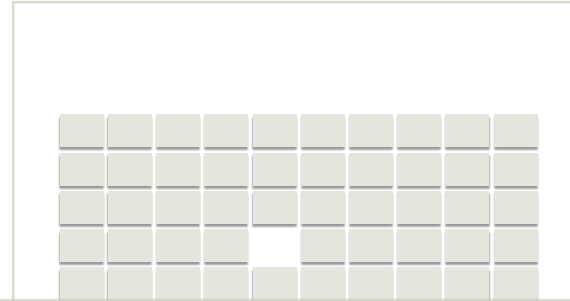
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1 - Francine (line 24)

It's sad that social life is all about technology. I like to try and communicate without it - so I don't end up like those people who can't communicate in person. I guess I learned a lot of that from my mom because she points that out to me.

Theme:

There is a stigma associated with forming digital connections, as compared to physical ones.

I'm addicted to technology. I'm on it 24/7. I try not to be on it during social situations, with like family, because I think it's rude. I know that teenagers have that stereotype of being so addicted, and I am, but I don't like to be the typical "on facebook all the time."

Finding themes in research data

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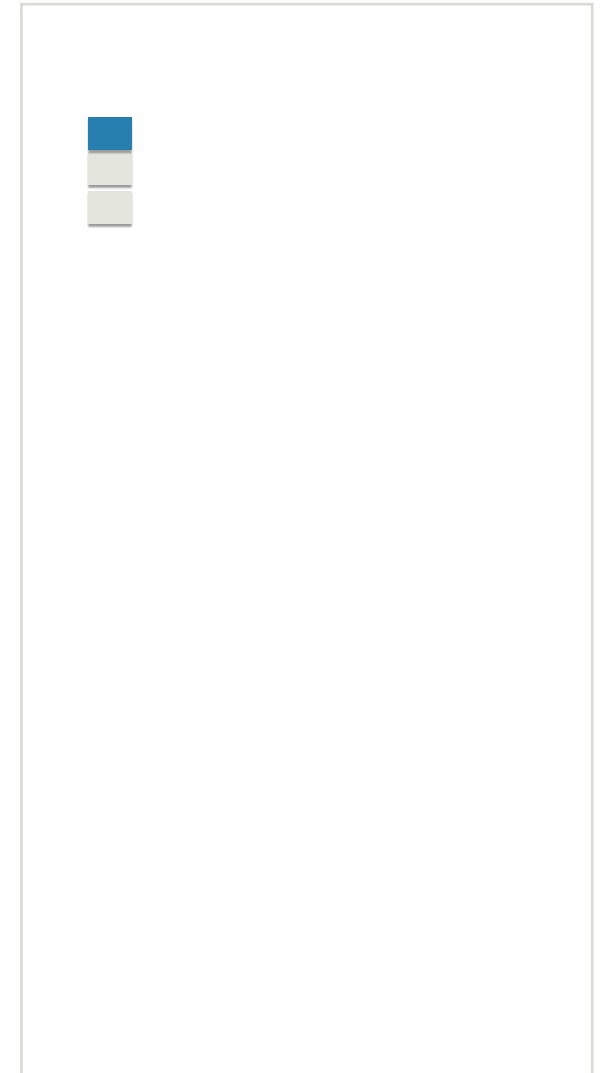
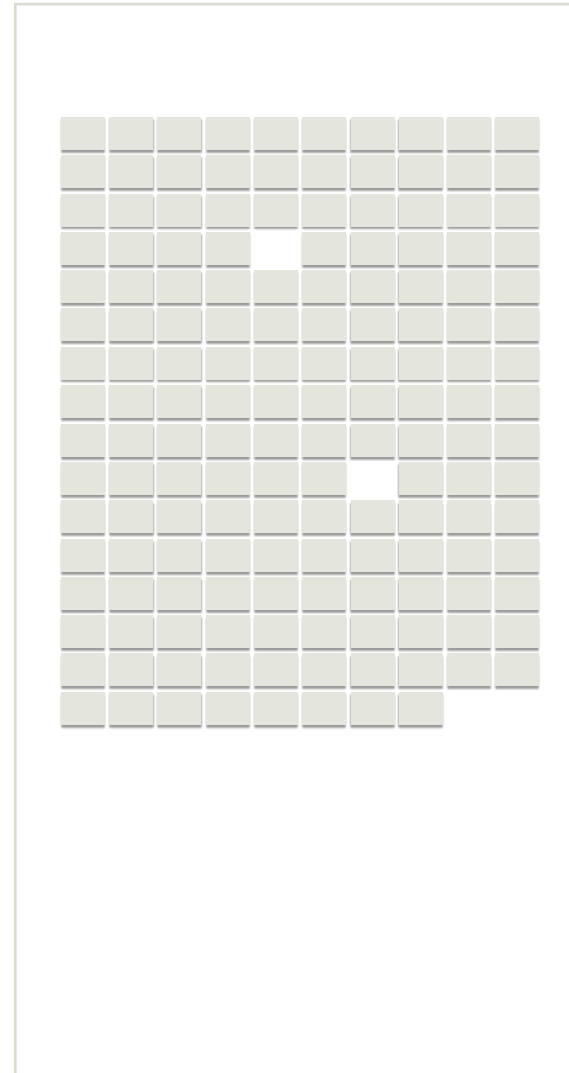
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Place the group on the wall.



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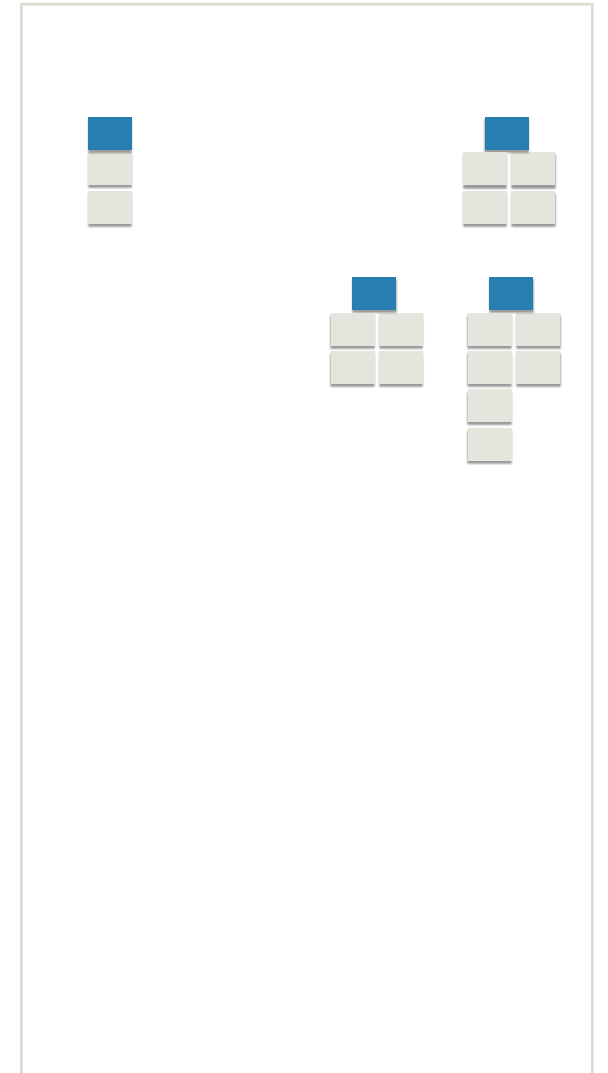
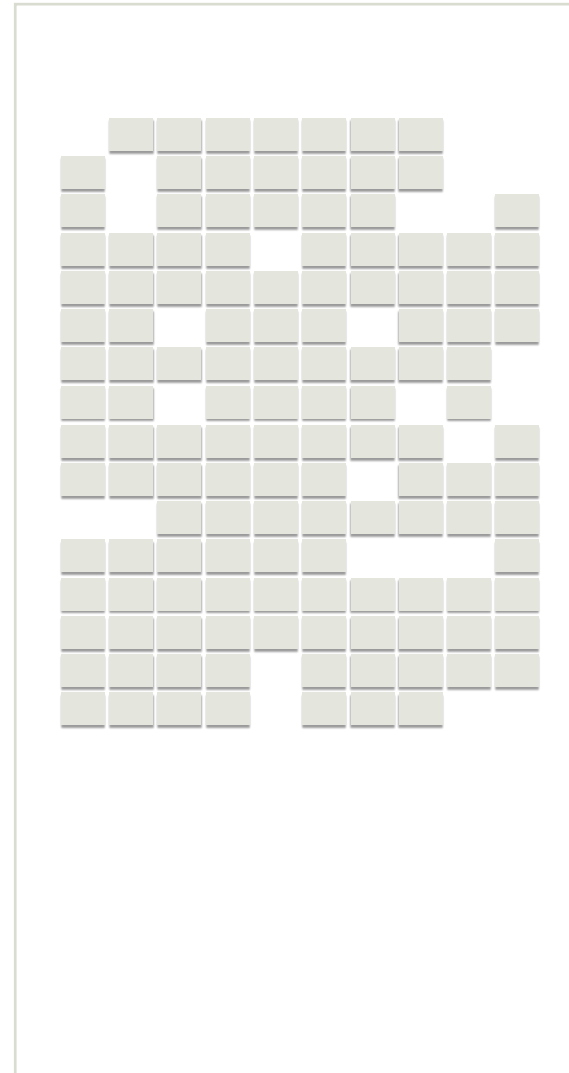
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name that captures your inference.

Place the group on the wall.

Repeat until you've moved through all of the data. Not all of
the data points will be used.



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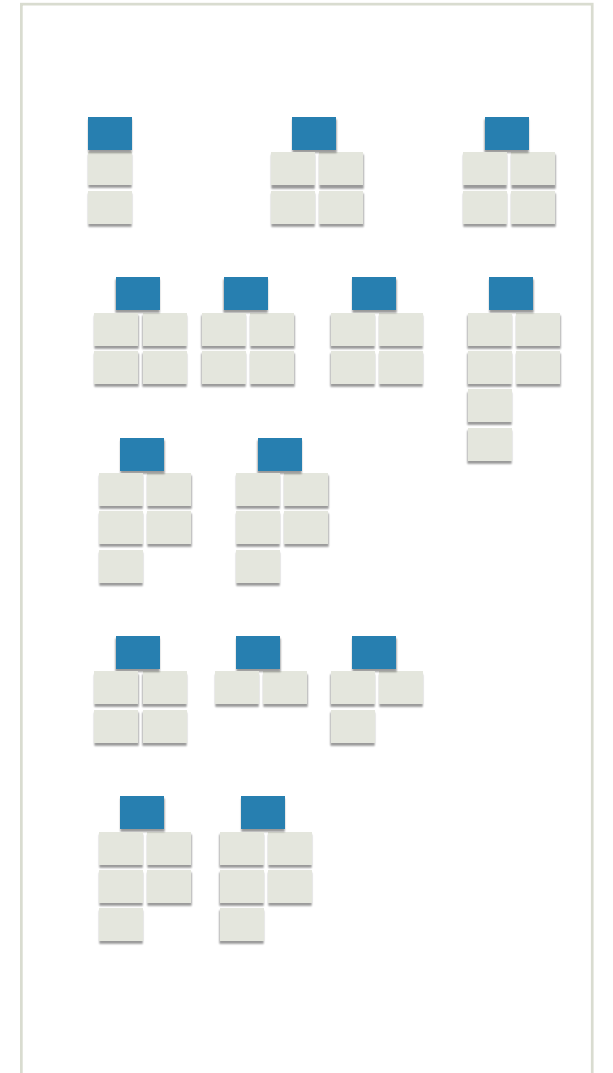
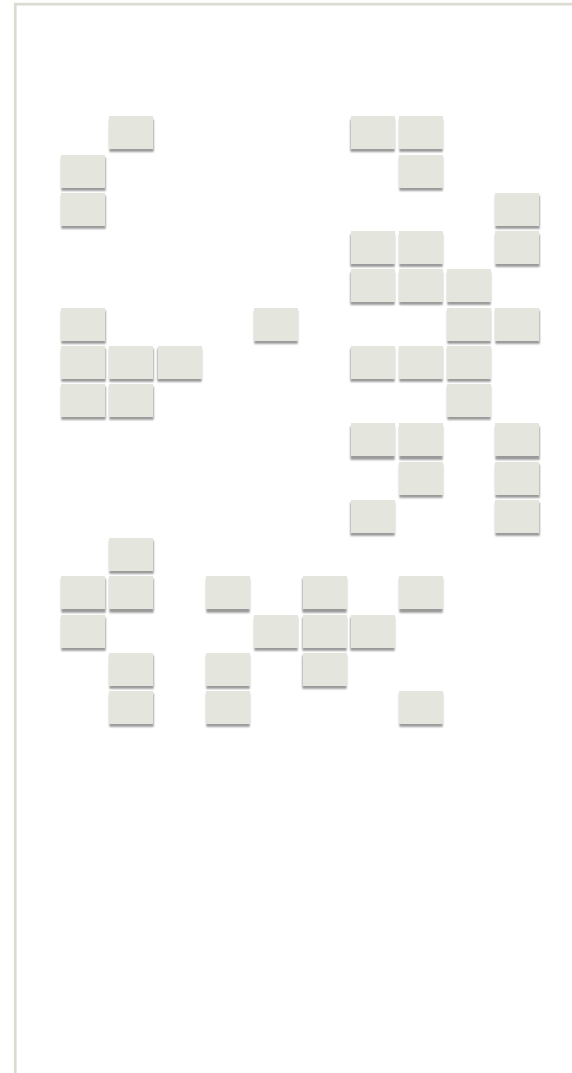
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Groups with 8 or more notes are typically too big. Break these groups apart.



Finding themes in research data



Summary

Our themes begin to move us away from raw research data and towards insights—and new design ideas.

Experience

The things and pressures on people that define and shape their interactions

Emotional Insight

Finding meaning in data by looking at it from the perspective of people

Narrative, Stories & Value

Stories of how a person can achieve their goals, and the value they get from an experience

Empathy

Thank you!

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