Chad Fisher • Matt Franks • Jon Kolko

This Chainsaw Cannot Fly

The power of storytelling to shape and drive product roadmaps

This Chainsaw Cannot Fly

The power of storytelling to shape and drive product roadmaps

Chad Fisher • Matt Franks • Jon Kolko

Brown Bear Publishing
1408 Cotton Street
Austin TX 78702

Notices

ISBN 978-0-9788538-3-9

Contents

y we do agile. But it's more

th

to s

an

We're running as fast as we
can. We just don't know
...ahead.

...e like fragile.

The executiv...
want to keep
shipping new
things. We k...
trouble...
thi...

Introduction

Do you feel good about your company's products and the way you create them? Do you swell with pride when you demonstrate them at conferences, or show them to potential customers? If you do, that's awesome. But if you're like many product executives, you probably wish your products could be better. You want to have a clear north star, a roadmap to success, and a well-oiled machine that ships the right things at the right time. You'd love for your products to work beautifully, to deliver exactly what your customers want, and—above all else—to sell in higher numbers.

Yet it's not so simple, is it? It would be great if you could dump what you have and create something new in its place. You'd have a product that's innovative, customer-focused, and way better than anyone else's in terms of features and style. Finally your customers could have their wishes fulfilled, and so could you. But you have legacy systems to contend with, lots of stakeholders cooking in the kitchen, and no super-persuasive story to tell which convinces your business to unlock the funds for such a transformation. And are you sure that you know what your customers really want in any case? You've done market research over the years, but you're not satisfied because it doesn't give you a clear picture of what to build.

It isn't your fault, of course. You've probably tried hard to discover your customers' needs through research tools such as quantitative surveys and focus groups. The problem with these is that they don't work very well, and here's why.

Let's start with quantitative surveys. Companies often see these as risk mitigation tools, and at first glance this can make sense. Ask a large number of people what they want to see in your new, improved product (it is said) and you can estimate how many would buy it when it's produced. In reality, though, there are three major concerns with quant-based research.

The first is that you're trying to prove adoption for an innovation that doesn't yet exist. That's kind of crazy, because if it's a genuinely innovative product that no-one has seen or experienced, there's no way for you to know if people will buy it. You're asking them to make a decision with hypothetical money. All sorts of factors—peer pressure, time pressure, money limitations—mean that their best guess won't necessarily be representative of their actual behavior. The uncomfortable truth is that disruptive, blank-slate innovation is inherently risky, and that while there are ways of reducing the risk, quantitative research isn't one of them.

The second issue with quantitative surveys is that, in order to make data analysis simple, they're typically based on closed questions. These don't allow for deeper exploration. An example is, "Which of the following features would you like the most?." For a start, this has the same inherent weakness as asking people if they would buy a product or not—it's hypothetical. Also, the question presupposes that people want more features, and that features are the best way to solve their problems. However, people rarely buy or use a product because it has a feature. They buy it because it provides them with value.

An experiential way of seeing a product takes into account all of its capabilities; any individual feature can be valuable, but it's when it's combined with others that it creates the experience.

And the features have to be done right. If a product has features but your customers can't find them, or if the product as a whole looks terrible, it will fail. It's not features on their own that will make it a success.

The final issue is that if you offer people a menu of options for your product, such as, "If it had features x, y, and z, which would be most important to you?" They'll only pick from the ones you've given them. You won't discover anything new or different. It's almost as if you've outsourced the responsibility for innovating to your customers, rather than taking this role for yourself. Successful product managers look at what their customers truly want and need—even if the customers don't know it themselves; combine it with what's right for their business and market; and create a plan for the future based on all this information together. They don't ask their customers to come up with the specifications.

Let's look at focus groups. Surely they're better than quantitative surveys for discovering what people want? They are, because they allow you to dive more deeply into the participants' opinions, but there are a couple of serious issues with them as well. One is similar to quant-based research, in that you're asking people to talk about hypothetical products as if they're real.

And the second is that the opinions you hear don't always come from the heart. When you have a number of people in a room there's always an element of group-think, and participants tend to give the answer that sounds the best rather than the one that they'd say if they were being completely honest.

There's another thing that you might have done to bring new or improved products into your company, which is to acquire a separate business or license an OEM set of capabilities. This is a rational choice on the surface: why create something from scratch when someone else has already done the hard work and you can see that it's working? The problems with this arise when you try to integrate the two brands. The parent company doesn't always understand how the newcomer works, nor are they familiar with its users. There's different technology to integrate, and the teams who manage the respective products find it hard to shift their loyalties around. Even if you keep the new product under its own brand, you're not familiar with the end-to-end user experience of it, and your customers won't have a seamless experience across the two. And finally, bringing a new product into your business is all about features, features, features. Products become bloated by them, which makes the product cumbersome to use. Customers start to drift away, preferring the simplicity of those that meet their needs without over-complicating the experience.

There is a better way. You can see that the problem with standard ways of developing new products is that they don't get to the root of who your customers are, and what they want or need. To understand that, you have to immerse yourself in their lives. This results in stories, and when you know your customers' stories you can empathize with them as people. It's these stories which are the springboard to knowing what kind of products you should create.

Stories also have another purpose. It's long been acknowledged that storytelling is one of the most effective ways to communicate a vision and win people over to it. When you find effective ways to tell your customers' stories to your colleagues, you bring the customers into the room. Their stories show how their lives would be better, fuller, easier, and richer, if only your new product was in their lives. It's as if they have their own seats at your meeting table.

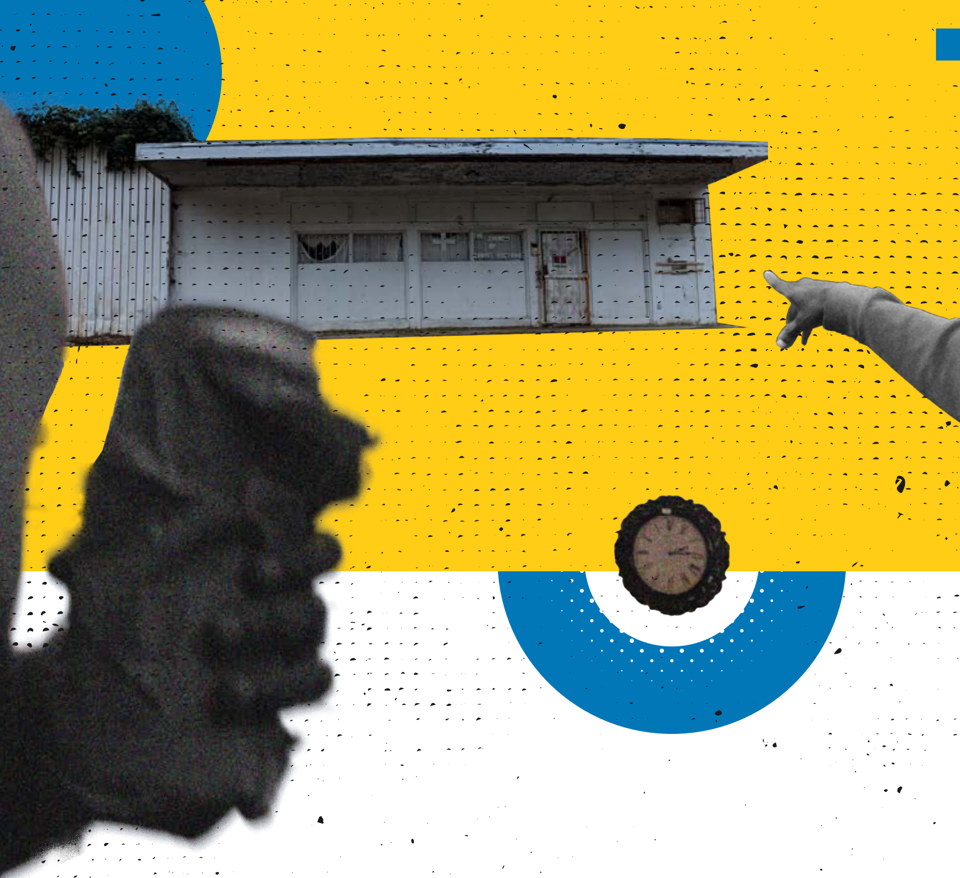
This is what we do at Modernist Studio. We gather customer stories, we think hard about them, we re-tell them to our clients together with the insights we've gained, and we create a strategy for new and improved products that can solve the problems the stories highlighted. To do this, we uncover customers' needs through immersive research in which we visit people in their homes or work environments. We then use this research to tell our own stories of the future to our clients; this is a future in which, if a new product existed, the lives of the research participants would be better. In this way, stories are the bookends for the innovation leap—they tell a narrative of the problem, and a vision of the future.

That's our business, but who are we as people? We're three designers at Modernist Studio. There's Chad Fisher, our Chief Creative Officer and a fantastic visual designer. We joke that he makes things look pretty, which he hates: "I don't make things look pretty, I make them look right." Then there's Matt Franks, our VP of Design and a genius with clients; we can always trust him to be the adult in the room. And finally there's Jon Kolko, the Head of Studio, who runs operations. He's often found sticking thousands of quotes and images from our research all over our walls, rearranging them, and then imagining insightful ways of interpreting the data.


Daisy

We wrote this book to help you, the product executive whose mission it is to create amazing products and who's ready to try a new way to do it. You'll learn why stories are a fundamental part of this process, and how we gather and tell them to transformational effect. Along the way, you can expect lots of entertaining stories. Read on.

the Power of Stories



If we were to tell you that once, during research, Matt, our VP of Design, tagged along while a convicted felon who'd been jailed for murder sold drugs, would you be surprised?

It wasn't what Matt was expecting either, but it happened. We were conducting research for a politician into people living in poor socio-economic conditions. As part of this, Matt and our client James—an urbane, conservative politician's aide—visited a poverty-stricken area of the city to meet some people there. For both men it was as far removed from their normal experience as it was possible to be.

The first participant Matt and James met with was Raymond, a tall, thin man who was rubbing his eyes like he just woke up (because he had). "Hey Raymond," said Matt. "We'd like to watch you while you work."

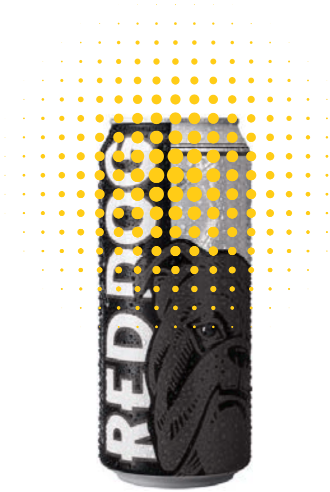
"OK then ...

Let's go deal some drugs!"

Raymond skeptically eyed both Matt and the be-suited James. "Watch me work ... I deal." He finished the sentence, sensing that we didn't really get it "... drugs. You know, crack. Meth." Matt rolled with it. "OK ... then let's go deal some drugs!"

Raymond led Matt and James to a different world—one with graffiti covering the buildings, broken glass on the sidewalks, and a general sense of disrepair. Two or three young men with hoods pulled low over their heads lounged against a wall, staring at the men as they passed by. When Matt started to worry about the safety of the expensive camera equipment he was carrying to record the research, Raymond reassured him.

"You'll be fine," he said. "I got you." He showed a handgun pushed down the side of his jeans.



Raymond was thirsty, so they stopped at a gas station and bought some beer (never mind that it was 9:00 in the morning).

Then, as they made their way to the stash houses where he stored and sold his drugs, Raymond reflected on the changing nature of the neighborhood. Gesturing to an adjacent area in which a Whole Foods had just opened, he described how gentrification was taking over, and how the men in his community struggled to find work. “They wanna work, though. They wanna apply themselves. But they got a record—they no longer needed.”

He himself had encountered parts of that system, he said, when he was in jail for many years for a triple homicide. While incarcerated, he'd learned the art of screen printing, so now his plan was to transition away from selling drugs to become a screen printer. He knew what he was going to create, too. He'd already started printing shirts with pictures of guns on them, just like the one he was wearing that day. Matt was impressed and asked if he could have one for himself; Raymond said yes.

And that's how Matt, our VP of Design, became the proud possessor of a green shirt with black weapons all over it, created by an ex-felon drug dealer who was on his way to becoming a screen printer. You couldn't make it up (and we haven't).

While we were telling you this story, we'd bet that you become a little engrossed in it.

Did you worry about what would happen to Matt and James in that dangerous place?

Did you wonder if Matt learned anything from the experience?

Did you imagine him putting on the shirt and showing it to his wife that night?

Did you smile at the thought?

Stories transport you and make you see the world through someone else's eyes. In this case, you were also prompted to see things from Raymond the drug-dealer's perspective.

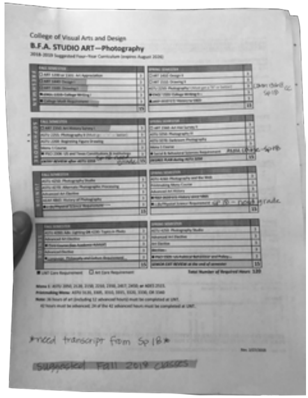
We imagine that his life is nothing like yours (it certainly isn't like ours), but for just a couple of minutes you were in it with him, and with Matt and James. You can't yet see the implications of the story, but you've had the opportunity to give it space by entering a world that you wouldn't normally live in. It's affected you (and Matt, and James) in a way that a set of facts about drug crime, or statistics about the lives of ex-felons, could never do.

Why stories are important

We once carried out some research with a photography student, Becca. As we approached her house we saw a man, shirtless, letting his dog poop on his neighbor's lawn. He waved at us and—without cleaning up after his dog—went inside to summon his daughter.

The garage door opened and we could see boxes and boxes of stuff towering all the way to the ceiling.

Becca, a smiling 23-year-old, appeared, squeezing herself down a thin aisle. She asked us to wait a moment, went back inside, and returned several minutes later. Once we were invited in, we had to thread our way between boxes and various belongings which crowded most of the house. A tiny area was cleared on the couch—an obvious attempt to provide us with a clean place to sit.



College of Visual Arts and Design

B.F.A. STUDIO ART—Photography

need transcript from Sp18

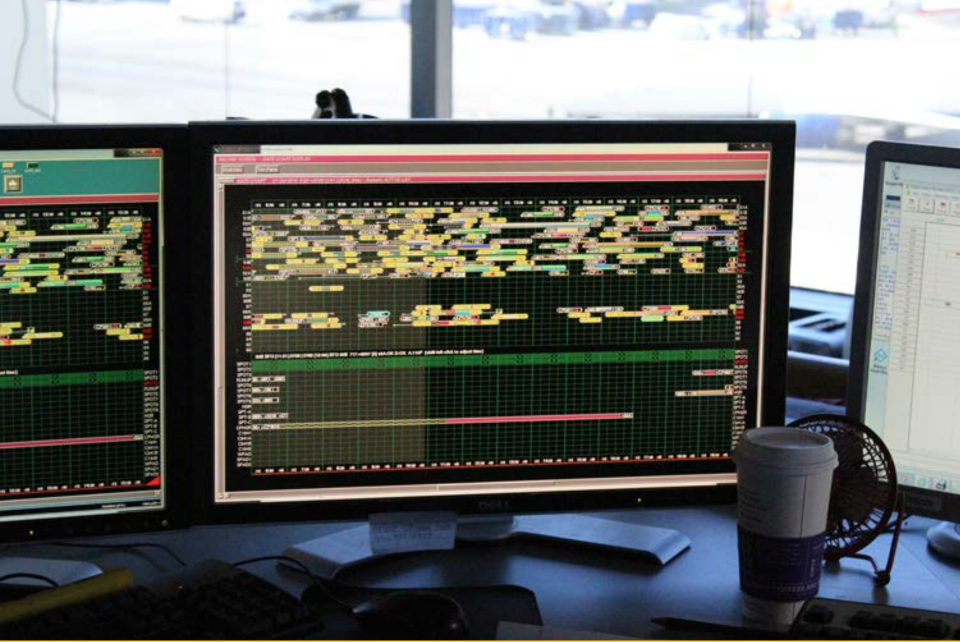
Suggested Fall 2018 classes

As we talked to her, Becca revealed that she was finally within reach of graduating with a photo degree, but was thinking of dropping out. The reason? She couldn't afford the final $3,000 that it would take for her to complete it. The cause of this was heartbreaking. Her dog-walking father was a hoarder and had spent most of his family's money on the items that cluttered their home. On top of that, he'd incorrectly filled out the financial aid documentation for her course and had hidden his mistakes until it was too late to correct them. She didn't blame him—she clearly loved her dad—but without that final $3,000 she was on the brink of wasting years of work and ending up without a degree.

After the session we got into our car to drive back to the airport, and started talking about Becca's personal story; we were so affected by it that we briefly discussed mailing her an anonymous gift of the money. For a variety of reasons around research ethics we didn't, but we really, really wanted to.

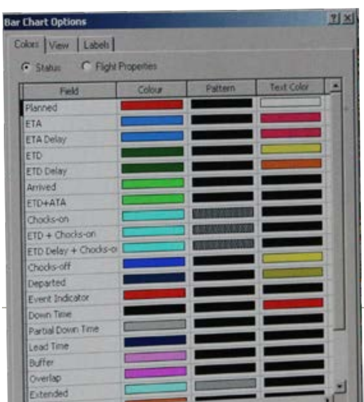
This experience gets to the heart of why stories are important: they transport us into a new context. They lead us to temporarily abandon our rational, logical minds so that we can inhabit an emotional space in which we believe in something different from before, and thereby allow us to enter an alternative reality. Through this, stories give us opportunities to believe in the experiences of others. They also stimulate our curiosity, which prompts us to ask questions.

Take a look at these two more—again, real—examples, so you can see what we mean.



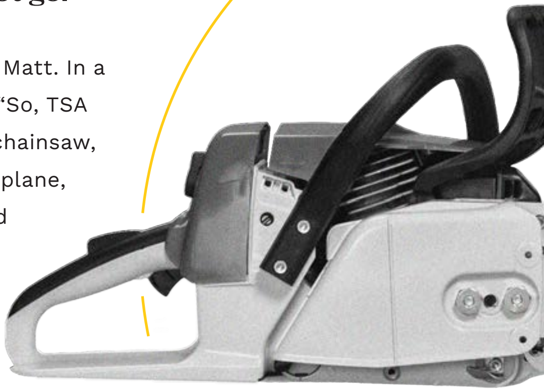
It’s 10:00 am on a Wednesday morning at Los Angeles International Airport.

The rain is pelting down outside but Matt’s warm and dry, deep in the bowels of the building. He’s watching Judith, a station control manager with a forthright manner, an impressive command of airport jargon, and in clear command of her three computer monitors, a hand-held radio, and two phones.

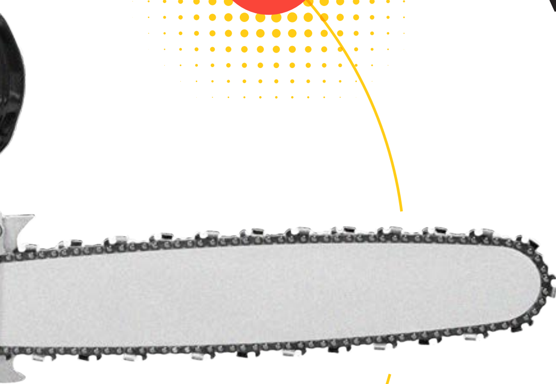


She picks up her radio. "Any available ramp supervisor?" she says. "I need a ramp supervisor down to the dungeon for some HazMat. Flight 1462 cannot go, the item cannot go."

Judith swivels her chair to face Matt. In a matter-of-fact voice, she says, "So, TSA called us and said there was a chainsaw, and obviously it can't go on the plane, so I asked for the passenger and flight number. They'll call the gate in a minute and tell the passenger they can't board."



Next she's on the phone with someone else. "TSA called and said 1462 has a chainsaw and they're going to collect it ...



Yeah, she checked in a chainsaw…

I don’t want to know what that’s about.”

Fast forward to the following month and Jon's 1,000 miles away in Denver, talking with Michelle. She's a 78-year-old retired teacher and is talking about her financial habits.

"When I first went to the bank," she explains, "I didn't know the difference between a savings and a checking account. When I was growing up, we put money under a mattress. If you wanted something, like a car, you took the money down to the lot and bought the car. I still do that, sometimes."

What made the passenger think it was okay to check a chainsaw onto a flight?

How will Michelle operate in a world that doesn't work with money under the mattress anymore?

And why had she never learned the difference between checking and savings accounts?

Because we're drawn in, we can't help asking ourselves about the wider implications of these stories.

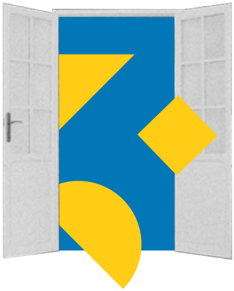
If you were in charge of the TSA (Transport Security Administration), would Judith's experience prompt you to reconsider your messaging about what people can bring onto planes? If passengers really think they're allowed to check in a chainsaw, what other safety rules are they unaware of? And if you're a product manager in a bank, would Michelle's perspective on banking play a role in not only how you design the screens of your online tools, but also how you build, name, and structure the products you offer? If your customers don't understand what a checking account is, how can you expect them to buy something more complicated, such as an annuity or insurance?

Stories are more fundamental to our lives than perhaps we realize. When we're in the middle of hearing a story we're in a state of possibility, we're open to new ways of thinking. This is important, because to effect any kind of transformation we have to want to make the leap between the way things are now and the way they could be in the future. What's more, they help us to feel emotionally engaged with a problem, because facts and figures can only tell us so much and they rarely tug on our heart strings. That's why we tell stories every day—to convince ourselves of something, to make a point to someone else, and to imagine new things to come. And it's also why, as design strategists, we base our research methods on the gathering and telling of stories. Unlike fiction, our stories are based on raw truth.

How we do it

The gathering of customer stories is the first stage of our design process and we have three main ways of doing it.

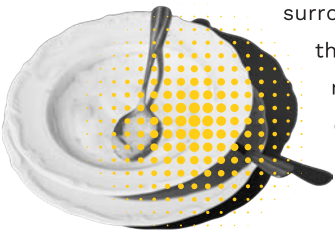
1. Full immersion



The first is to go to where our clients' customers live, work, or play, and to watch them doing, and talking about, the living, working, or playing. It's as simple (and involved) as that. We immerse ourselves in people's activities by temporarily inserting ourselves into their homes or workplaces, and we see what they do in the real context of their lives. This means that we witness what they actually do, rather than what they say they do, what they'd like to do, what they usually do, or what they might do. So if we're in an airport, for instance, we see airport work happening and can even try it out for ourselves to experience what it's like. We might walk past baggage handlers sleeping on piles of luggage, and when they wake up, ask them about how their night shift went (and we really did!). That's the value of being in the place.

This is especially true of someone's home. Think for a moment about your own home; walk through it in your head and try to see it as a visitor might. Don't clean up—just leave it as it is. What would your guest be confronted with? Artwork on the walls? Children's toys? TVs, books, plates, and papers? Think of the clues that point to the kind of person you are.

When I—Jon—see my own home through the eyes of a guest, I visualize a beautiful kitchen in the center. I imagine that the people who live here find comfort in domesticity and in creativity around food. It looks like something out of a magazine, and it must be a point of pride—I bet those people entertain in that room because they think that it represents them. But when I look a little closer I see a few dishes in the sink and a bit of dust under the cabinets. I look even more closely and spot some paint chipped on the lower cabinets, and a dog dish with crumbs scattered around. I see a stack of mail, bills, and catalogs on the counter.



This is a theme of my home: a beautiful place of comfort that my wife and I are deeply proud of, but with signs of being slightly ignored. We clean regularly but haphazardly, and we're busy—the stacks of papers and books are things we haven't gotten around to. We have no television, and we're proud of abstaining from popular culture, yet we have tablets and computers for social media. We eat healthy food and let everyone know it—but I also drink an awful lot of beer. Probably too much.

Home is an interesting mix of aspiration and reality. Many of us surround ourselves with the things that we feel best represent ourselves to other people, but also with what we're most comfortable with. A home is full of details and clues that are about as honest a glimpse into a person's self (and presentation of self) as we can find. It follows that when we're invited into the home of a research participant, we see both how they want to be viewed and how they really are.

Naturally it's a privilege to be invited into someone's home or workplace and we don't take it for granted. Our approach is that the inhabitants are the experts on their own lives and we're the apprentices. Raymond is an expert drug provider; Judith is an expert chainsaw remover. We're always considerate, curious, and non-judgmental; this helps them to relax around us, and for us to see the world through their eyes.

You'd be surprised at how comfortable people are with us looking around their living spaces, and how much they're willing to show and tell us. We can also go through their private possessions and ask questions about them. If we're talking to them about their taxes, for instance, we can ask if they would show us their most recent returns. We see them rooting around in their filing cabinets, shuffling through the piles of paper on their dining tables, or heading straight to a file on their bookshelf. We're now realizing the seriousness, or lack of it, with which they treat these things. Similarly, if we're talking to people about education we can ask to see their homework assignments, log onto their computer and try out their online learning tools, and accompany them to one of their classes.

Through this, we learn some surprising things. One of our clients was a manufacturer of a special kind of TV remote control, so to learn more about how people use remote controls we went into families' homes to look at their kids watching TV. We hung around their living rooms and saw the kids fight over who got to hold the remote—activities you might expect. But we also realized that the kids were messaging each other on their phones while they were sitting beside each other on the couch. We would never have thought to ask a child, "Hey, do you text your sister while you're sitting a foot away from her?" But that's what happened, and we included it in the story that we told about their lives.

2. Video journals

The second method we use to discover stories is video journals. Sometimes, before we visit our participants, we give them activities to carry out and a way of recording them. The resulting footage can be anything from 30 seconds to five minutes long.

For instance, we worked with a life insurance company that wanted to better understand how people purchased its product. So we said to the research participants: "On the first day we'd like you to record yourself learning about life insurance. On the second day we want you to find three providers. And by the end of the week we'd like you to go through the process of buying the insurance, all the way until you have to pay." The videos gave us a level of intimacy with what they did that we'd never have been able to achieve by asking them about it in theory. And when we visited them at home afterwards, we could question them about what they'd recorded.

Again, we witnessed some surprising activities. On video, we watched a guy researching the term life insurance on his phone while pounding the treadmill at the gym. When we showed the footage to the executives at the life insurance company, they were astounded. They assumed that people treated buying life insurance as a serious business, sitting down with their partner to talk about how much coverage they needed and pondering what financial legacy they wanted to leave. Whereas this guy carried out the activity while ramping up his step count.

The fact that this was captured on video made a huge difference.

“Did this really happen?” the executives asked.

“It did,” we replied.

“Okay, but he must be an anomaly.”

“Maybe he is. But he’s a prospective customer.”

“How could he do that? It doesn’t make sense.”

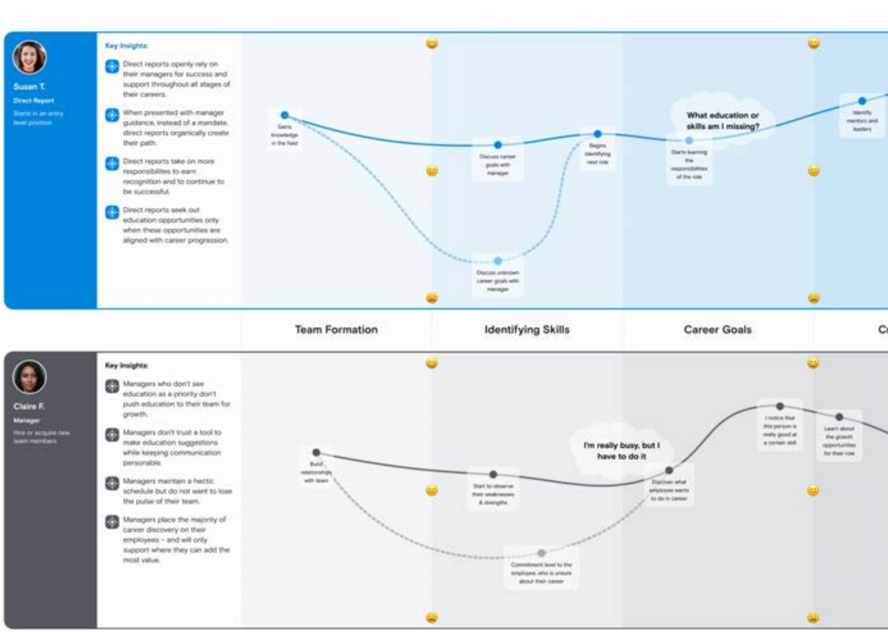
It didn’t make sense to them because it didn’t match the picture of a prospective customer that they’d built in their minds, but it made perfect sense to our participant. Why wouldn’t he buy insurance at the gym, when he had some spare time with nothing else to do?

Our research for a real estate company revealed another way that timelines and videos help us to understand people’s lives. Our client wanted to learn more about how renters go through the decision-making process of buying a house instead of continuing to rent. In the mind of the company executives, it was a linear exercise: a renter does their research about buying, chooses a property, then buys it. However, by asking renters to video themselves over time, we prompted the executives to think of the process as being more fluid and ambiguous than that. The renters might ask themselves in November if they should renew their lease in January, or look to buy a place instead. Then they would look at mortgages, start to worry about the commitment, and decide to carry on renting. In June or July they might catch the bug to buy again, and then abandon the process until November rolled around once more.

When we presented this to the real estate executives, they found that the difference between what they’d expected and what actually happened was uncomfortable for them. But the videos from the participants proved to them that their potential customers really did think this way about real estate.

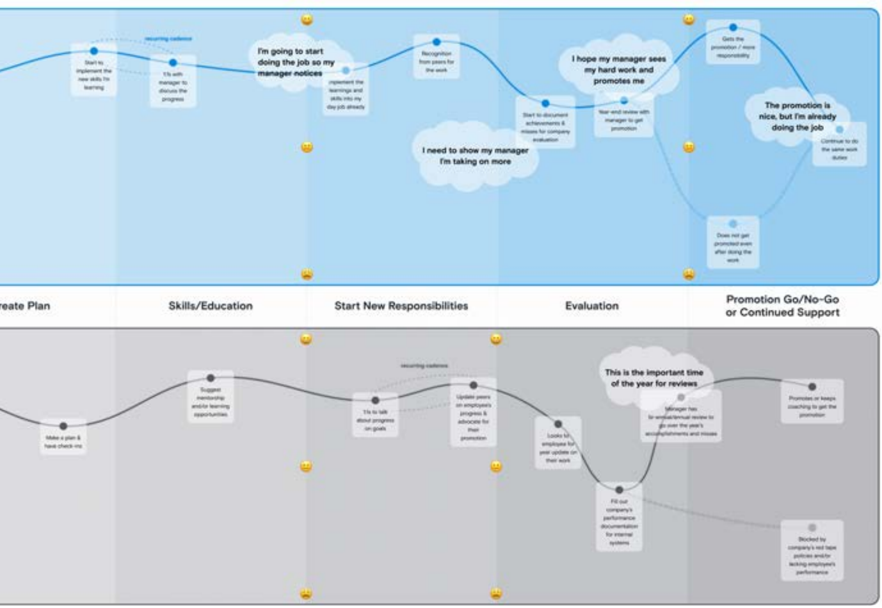
3. Worksheets and activities

The third method we use is to ask people to fill in worksheets, the most common of which is a timeline. If we want to discover what someone thinks about their education, for instance, we obviously can't sit with them all the way from elementary school until they get their PhD. But we can ask them to complete a timeline and write down key steps. Of course, what someone thinks of as a "step" is unique to them, as is the place from which they choose to start. Some people begin their education timeline at kindergarten and others only the week before our conversation, because that was the most significant stage for them.

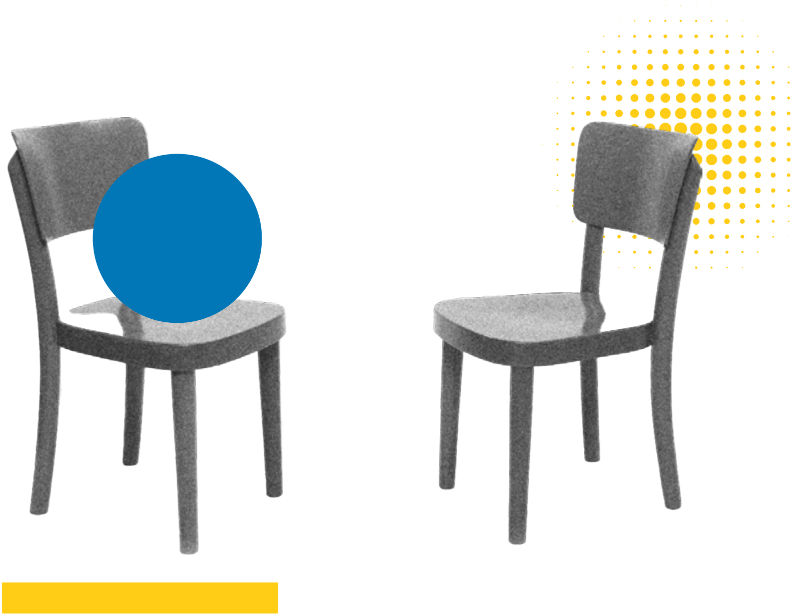


After the participants have written down their steps, we ask them to go through each one and tell us whether they were happy or sad at the time, and why. This isn't the same as watching their behavior when it happened, but it's a lot more "real" than asking them to talk about it in theory. What's most interesting to us are the experiences they choose to highlight, because they're the ones that stand out for them. And by questioning them about those experiences in person, we can get into the detail and the richness of their situations.

These research methods are hard and time-consuming—it would be much easier for us to carry out quantitative surveys or a focus group with 10 people at once. But the value of in-context research is that we aren't simply



an information-transferring device from consumer to client, but the author of a point of view that comes from a rich immersion in their customers' lived experiences. For this reason, we bring our clients into the field with us so they can experience everything first-hand for themselves. And we stay in continuous conversation throughout and debrief with them immediately afterwards. This is important, not just for their learning but also for them to be able to sell the research findings internally to other stakeholders. They have to believe that what the research participants did really happened, and the best way for them to trust it is for them to see it with their own eyes.



What this kind of storytelling is not

If this way of gaining intelligence about your customers is new to you, it can seem as if it has some pieces missing. And it does—deliberately so. I'll address the two main ones here.

Storytelling is provocative, not predictive

The most common feedback we hear when we present our research to our clients is: "This is all very interesting, but these stories aren't representative of our customers' experiences across the board. They're anomalies." And what we tell them is that they may be and they may not be—that's not the point. Our goal isn't to talk to 20 people and extrapolate what we learn from them into thousands of people. Our goal is to talk to 20 people and use what we learn as inspiration for making new things—for designing new products, new capabilities, and new ways of seeing the market. It's about provocation, not prediction.

What we find time and again, though, is that when we tell the stories to our clients, they resonate. Sometimes it's because they're ridiculous or outlandish, and sometimes it's because our clients can see bits and pieces of their own experiences in the narratives. But when they resonate, the stories become sticky. They evolve into a centerpiece for the business conversations that follow.

Participants are not personas

You probably know what a persona is: it's a short description of a composite character that's designed to represent a group of customers. Personas have become popular in marketing and product design because they're seen as a practical aid to ensuring that products are aimed at the right people. For instance, one of our clients created a persona with the unfortunate name "No-Lunch Nancy." Amongst other things, she was so busy that she never had time for lunch; she worked out three times a week at her local gym; and she had a dog.

For us, personas are a waste of time. The intention behind them is to help product designers to make decisions by looking at things through customers' eyes, but this can be misleading because the personas are fictional and thin. Instead of the rich substance of Raymond and his experiences in jail and on the streets, they offer only a one-dimensional, made-up caricature. As such, personas have little substance and are rarely inspiring.

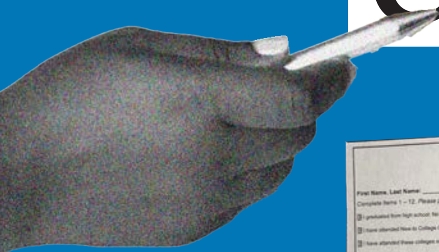
In fact, the point of the stories we gather is that they're not typical of a "standard" customer. We celebrate the participants' idiosyncrasies rather than smoothing them out. It's through the quirks that we see bigger truths—that people can make mistakes about what they try to carry onto planes, or that there are those who know a lot less about finance than banks might think. If you have time available to explore who your customers are, my suggestion is not to create personas. Instead, go talk to five people who use your product. Just hang out with them for a while and see what you learn.

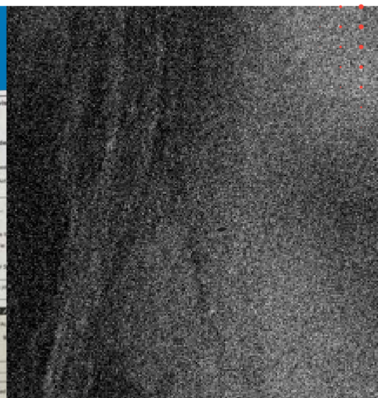
In exploring the power of stories, we've touched on the impact they have on our emotions. This is a crucial element of their effectiveness, and is why the next chapter will explain how stories bypass our logical side and reach straight to the heart.

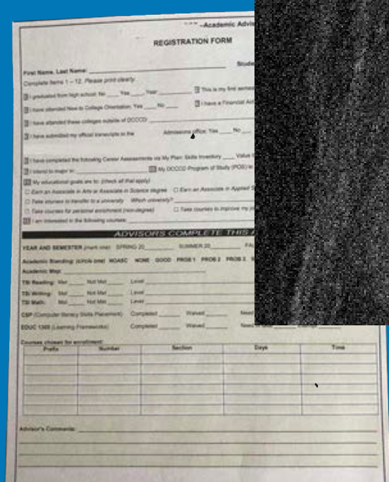
$$A_V = \frac{R_1 + R_f}{R_1}$$

Emotion:

Breaking the Logical Circuit

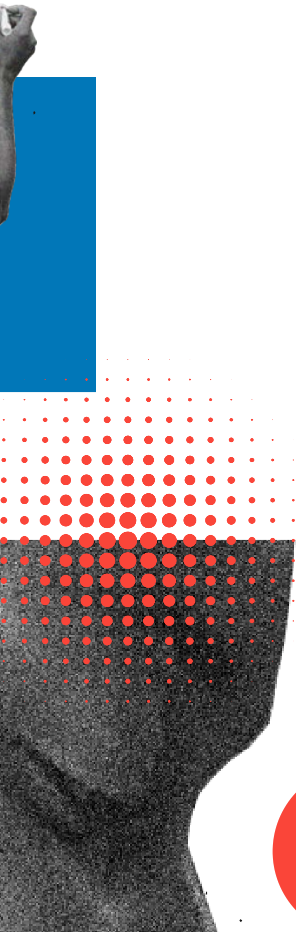






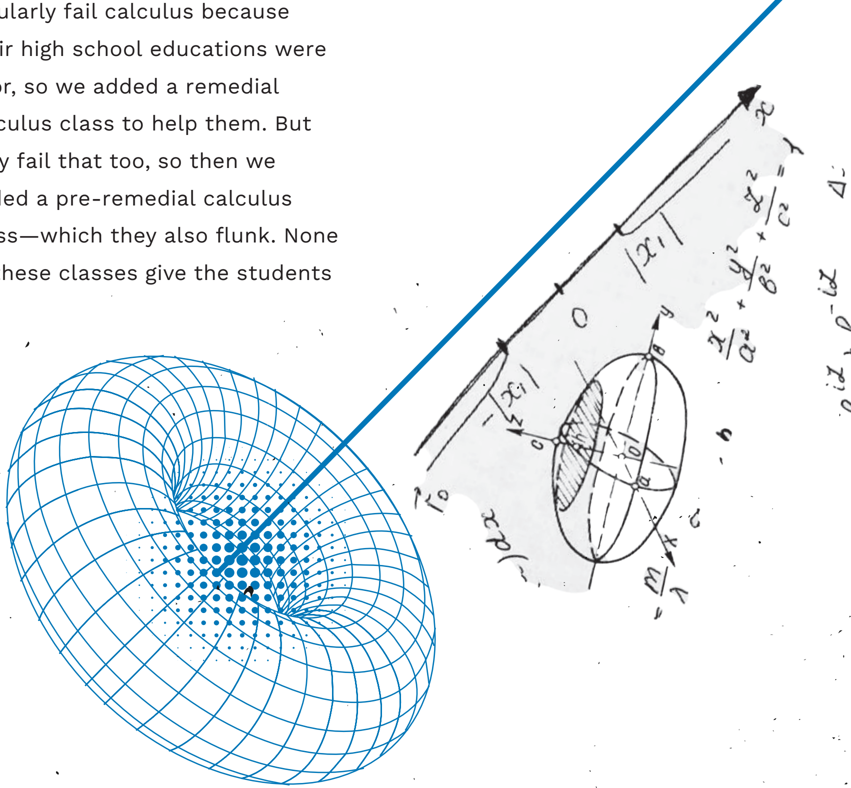
Gina leans back in her chair and lets out a sigh.

A career counselor at a community college, she wears the distracted expression of someone who's had too much to do, and not enough time to do it in, for a long time. She's explaining her college's system to us. "The students here mostly come from low-income households," she says. "They're primarily African-American, and often the first of their families to go to college. Their parents are so proud of them, but because they haven't been through the college system themselves, they've got no way of preparing their kids for what it's like." She paused. "So the kids have no idea about the calculus class, for instance."

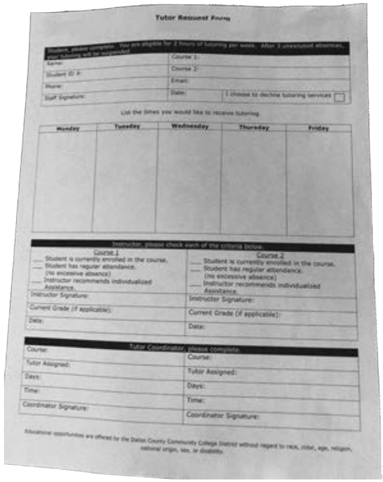


“What’s so unique about calculus?” we ask.

“They have to take a calculus class, and pass it, before they can start their courses. It doesn’t matter what their courses are about, they have to get the calc first. The problem is that they regularly fail calculus because their high school educations were poor, so we added a remedial calculus class to help them. But they fail that too, so then we added a pre-remedial calculus class—which they also flunk. None of these classes give the students any credit towards their intended qualifications, and eventually their parents discover that even though their kids have been at college for a year and a half, they’re no closer to graduating than when they started. And of course, the kids feel like shit. Yes,” she said, noting our expression.



“It’s as crazy and sad as it sounds.”



Tutor Request Form

Student, please complete. You are eligible for 2 hours of tutoring per week. After 3 unexcused absences, your tutoring will be suspended.

Name:	Course 1:
Student ID #:	Course 2:
Phone:	Email:
Staff Signature:	Date: / I choose to decline tutoring services ☐

List the times you would like to receive tutoring.

Monday	Tuesday	Wednesday	Thursday	Friday

Instructor, please check each of the criteria below.

Course 1	Course 2
___ Student is currently enrolled in the course. ___ Student has regular attendance. (no excessive absence) ___ Instructor recommends individualized Assistance.	___ Student is currently enrolled in the course. ___ Student has regular attendance. (no excessive absence) ___ Instructor recommends individualized Assistance.
Instructor Signature:	Instructor Signature:
Current Grade (if applicable):	Current Grade (if applicable):
Date:	Date:

Tutor Coordinator, please complete.

Course:	Course:
Tutor Assigned:	Tutor Assigned:
Days:	Days:
Time:	Time:
Coordinator Signature:	Coordinator Signature:

Educational opportunities are offered by the Dallas County Community College District without regard to race, color, age, religion, national origin, sex, or disability.

It gets worse. Gina goes on to tell us that given the thousands of students at the college, counselors rarely have much time to spend with them, so most of the kids go through the process on their own. There’s nobody to help them navigate the system. Naturally many drop out without ever getting to take classes in the subject they were interested in, because they have to do a bunch of boring calculus classes that they weren’t prepared for at high school. And their potential hopes of transferring to university after they’ve finished at college are thrown in the trash, along with all the money they’ve spent.

As we sit in Gina’s office hearing this story we find ourselves feeling increasingly sad and frustrated, and we know that our client, a university, will be too. The eventual outcome of this research will be an online tool that helps college students transfer to university with ease, by enabling them to unlock the right classes at the right time. It effectively scales the role of the counselor, so that students can have a Gina at their fingertips whenever they need her.

But more immediately, our experience with Gina illustrates what compelling stories do: they force us to envisage new realities by using emotion to short-circuit logic. In Western culture we're trained to value logic more highly than emotion. We don't like to think that we act on feelings alone, so we're always looking for ways to post-rationalize the emotion-based actions we've taken. We strive for a logical approach in all things; and while we can achieve a lot with a rational mind, one thing that it's not good for is imagining a world that doesn't yet exist. We need to abandon logic if we're to come up with creative ways of solving problems.

Think back to the last time you went to the movies. Was your goal to take a logical approach to what you saw? Of course not—you'd never have been able to enjoy the experience. Instead, you immersed yourself in the action, allowing your brain to make all kinds of associative mental leaps. You

found yourself feeling what the main character was feeling, and wanting what they wanted, even if those things wouldn't have made sense to you in your own life. You could see that within the protagonist's worldview, the actions they took were right for them. The story allowed you to tap into a different universe, not through logical argument but through appealing to your emotions.

That's fine for the movies, but why use stories to short-circuit logic in organizations? Why not just present a series of facts and figures with the aim of achieving the change you want? Because logic doesn’t persuade nearly as strongly as emotions do. If we were to use the language of analysis, we could show that there are quantifiable opportunities for your business to make money in certain ways, but we’d never be able to convince you into a radically different way of thinking about your products. Yet when we tell you the stories of the people we’ve met, and the ways we’ve come up with to help them, we can persuade you through emotion. We’re creating a subjective lens for you to look through that’s based on the research participants’ wants and needs, and which will in turn lead to a set of criteria for new product or service designs.

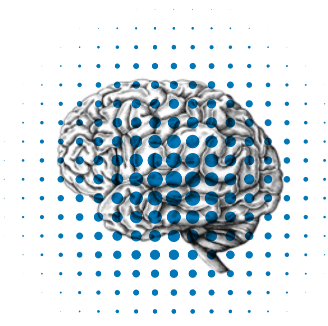
A new vision of the future is rarely a single, simple design improvement.

It often involves changes to multiple products, services, and systems, and so it needs buy-in from a large number of people in your organization—all with similar but different perspectives. It’s understandable that they need convincing because change is expensive, risky, and often scary.

Stories help not only to communicate what the change could be, but also to convince everyone that it will make things better than they are now. It's difficult to push a design rock uphill by yourself, so anything that helps you to overcome people's differences, and unite them around a common vision, is helpful. Stories do this.

All this is a roundabout way of saying that stories work because they help us to imagine, and that this is down to their emotional pull. They also make it easy for us to convince others, because they're easy to tell and re-tell.

So how does the emotional aspect of stories work? In two ways: by challenging the way we think, and by changing the actual chemistry of our brains. Within these two categories there are a number of ingredients for storytelling and these are what this chapter will focus on. They're not a checklist or formula for creating a great story, but facets of what leads to compelling storytelling.



They are:

- **Cognitive dissonance**
- **Immersion**
- **Transportation**
- **Sympathy and empathy**
- **Emotional contagion**

Cognitive dissonance

Have you ever looked at Craigslist, eBay, or Amazon and asked yourself how platforms that look so poorly designed from a visual perspective can still dominate the world of e-commerce?

And if you're up to speed with the current music scene, have you ever wondered how a truly terrible band like Nickelback—one that literally no-one seems to like—has managed to sell 50 million albums?

Seemingly self-contradictory notions like these create in our minds what psychologists call "cognitive dissonance." To see what we mean by cognitive dissonance, try the following thought experiment on yourself. Say these phrases out loud as if you believe them:

I believe that poor people are poor because they're lazy.

I believe that poor people are poor because they've been dealt an unfair hand in life.

We're willing to bet that you were tempted to pick the one that most accurately represents your pre-existing beliefs. But try really, really hard not to pick only one. Just live with the concepts and ponder them as if they're both true. It's not easy, because when we hold two conflicting ideas in our heads at once it feels extremely uncomfortable. We'll do anything we can to resolve them into one idea.

Cognitive dissonance is a psychological state that's been studied extensively by social psychologist Leon Festinger. He explains that when we come across events that don't fit our worldview, we find ourselves mired in an uncomfortable disconnect between our morals and expectations, and the things we're experiencing. This feels unpleasant, so we work hard to resolve the dissonance. We might question our beliefs and change them; we might re-think our experience and change our perception of it; or, most likely, we might reinforce our original belief, writing off the new idea as being incorrect.

So what does this have to do with business? Roger Martin, the former Dean of the Rotman School of Management, has studied the traits of leaders in large, successful corporations.[1] He identified that one of the most important (and unique) traits of leaders is what he calls integrative thinking. This is the ability to hold two competing choices or ideas in our heads at once and after allowing them to sit there for a while, instead of just picking one, to synthesize them into a meaningful whole. Leaders who can do this are able to consider many perspectives on a problem at the same time, and aren't likely to make a decision based only on their pre-conceived views of the world. However, given that we're not all great leaders and few of us have this superpower, most of us will work to resolve dissonance through the methods I described above. This leads us to reject new ideas that challenge our pre-conceptions.

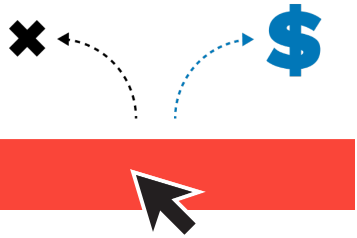
Cognitive dissonance plays out in design strategy in various ways. You've already seen the dissonance created in the minds of the insurance executives when we showed them the video of the guy researching life insurance on

[1] The Opposable Mind: How Successful Leaders Win Through Integrative Thinking by Roger L. Martin. Harvard Business Review Press, 2009.

the treadmill. They found it hard to reconcile their pre-conceived assumptions about how people did these things, with the reality of what the research partici-pant actually did.

Now imagine that you're the Creative Director of a bank, and you're looking to improve how your customers pay their bills online. Your product team has trialed the addition of a large banner to the top of the bank's mobile app, which advertises a new partnership with a third party that helps people to pay their bills. So far so good, but when users tap on the banner they're taken to a completely different product, with a different brand and way of interacting, and worse, they have to register themselves for that company. It seems obvious to you that it's a dumb thing to do, but the product team presents you with data showing that, in a test, 80 percent of users tapped the banner. Your company is paid based on each tap, and in the trial your bank made hundreds of thousands of dollars. At scale, it would translate to millions.

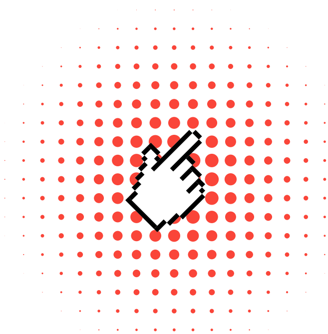
You're now in a state of cognitive dissonance. Your branding expertise and your commitment to user experience tell you that the banner is a terrible idea. But your commitment to the business' financial success and your desire to be a team player tell you that it's a wonderful idea. Sitting with both ideas is painful, and if you're like most people you'll go with your existing worldview.



You'll argue to remove the banner, fighting tooth and nail in every meeting to see it through.

And yet there aren't only two options here: keep the banner or remove it. It's a creative problem, not a binary one, so there are infinite ways to resolve the issue. You could make the banner bigger or smaller; you could move it to the bottom of the screen; it could be in the app or in an email; it doesn't need to be a banner at all, but a physical item mailed to the customer; the compensation relationship with the partner could be re-negotiated so that referrals aren't the main source of revenue. The potential solutions are endless.

The integrative thinking that Roger Martin describes requires holding "banner/no banner" in your head at once, without picking either one. You have to be willing to abandon your rational thought process—the one that tells you to choose either option or combine them through some kind of reasoned compromise. This is where stories help, because they can point the way to potential solutions in ways that bypass a logical, non-integrative way of seeing things.



Storytelling ca

an provoke dissonance.

Darius' house was in the kind of neighborhood many of us wouldn't dream of walking through at night, or even in the day if you could help it. As we pulled up outside in our rental car, we double-checked that we'd got the right place and then locked the doors carefully.

Inside the house, Darius welcomed us and pulled out a couple of chairs for us in the kitchen. It was small and messy, but clearly a welcome gathering place for his family to spend time together. We were there to talk to him, on behalf of our bank client, about the videos he'd taken for us showing how he managed his finances. We were intrigued by a technique he'd developed for keeping track of his spending—a process which, given his pay-check-to-paycheck lifestyle—he clearly felt was important. As we settled down he pulled out his Android phone, cracked screen and all, and opened the calculator app.

"At the beginning of the month," he explained, "I enter the money I have to spend. Every time I buy something, pay the rent, whatever, I hit minus and deduct it. That's how I know how much money I have left. I use this app because when I close it, it doesn't erase the calculator."

To Darius this was a simple and effective way of ensuring that he didn't run out of cash each month—it made perfect sense.

But to our client it was bizarre and unbelievable:

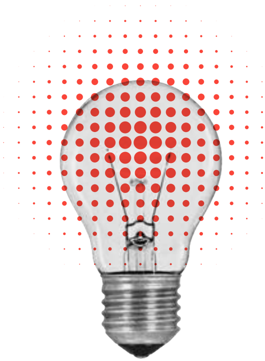
"That's ridiculous, what a dumb way to manage your finances. Surely nobody really does it that way?"

But Darius did do it that way—we know because we saw him do it. **And to him, it wasn't ridiculous or dumb; it was perfect.**

When we tell research participants' stories to our clients, we often find ourselves challenging the way they think. The stories create a sense of discomfort, which means that our audience will work hard to create the consonance they need to feel easier. Part of our job is to keep their minds open so that they can engage with the idea of a new strategic direction for their products.

It's rarely the case that people resolve their dissonance in one go; usually it's a gradual process. And it's an emotional, rather than a logical, one. If you think of your current political views, for instance, and contrast them to what they were when you were in high school, you'll see that you didn't necessarily move, step by logical step, to a new position. That's why it's hard to explain what happens in words. The way we most often realize it's occurred is when we look back and see that we don't think about something in the same way as we did before, and that, without intending to, we've shifted our stance.

When you're developing novel products and solutions for your customers, it goes without saying that criticizing or disbelieving people when they do things that you find puzzling isn't the best way to generate products that will improve their lives. This can be the case with issues both small and large. We worked with one client to whom we showed video footage of customers who were finding it hard to locate a button labeled "log in" on the company's website. In the videos we could hear the participants repeatedly asking, "Where's the 'sign in' button?" This illustrated that the name of the button should be changed to "sign in," but our client couldn't accept that. The dissonance leap was too extreme; how could such a small label change matter so much?



It’s important to recognize the emotional power of cognitive dissonance because it happens almost every time you encounter a new idea. That’s understandable. As an executive, your job, reputation, and often your compensation, are on the line if you get decisions wrong. Why wouldn’t you stick with what you’ve always assumed to be right? But at the same time, you have to be able to hold two contrasting ideas at once so that you can engage with creative solutions. And stories, with their emotional pull, help you to do that.

Immersion

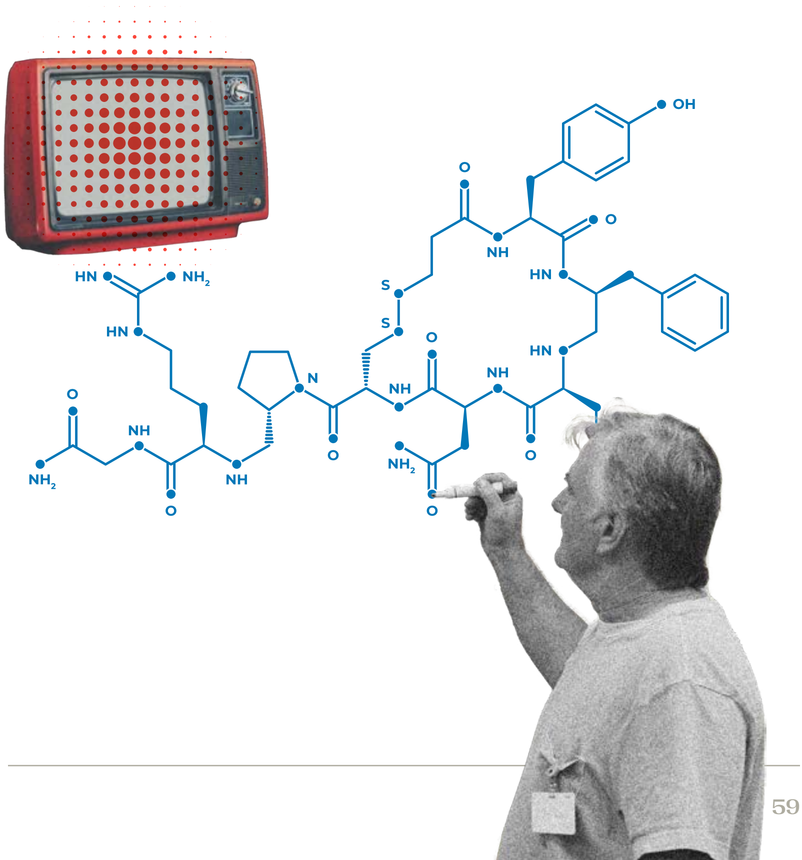
Here comes "the science part." Immersion is the biochemical reaction that's triggered in our brains when we read or watch a great story. This reaction creates the feeling of being so involved in an experience that we start to lose our own perspective on it and, as a result, become susceptible to new ways of thinking.

One of the main authorities on this topic is neuroeconomist Paul Zak, who says, "Well-crafted stories sustain attention and produce emotional resonance in listeners, a neurological state we call 'immersion'."[2] He describes how, when we hear a story, we produce the hormone oxytocin. This is often called the love drug, because it increases during intimate contact such as hugging, kissing, and sex. Zak's research shows that the amount of oxytocin released by our brains can predict how much we're willing to help others; for instance, it's shown that after exposure to a story, we'll give more to charity.

As well as drawing us close to the main actors in stories, oxytocin ensures that our attention is attracted and held. It's pleasurable to hear a story, which is why we pay good money to see them in movie theaters or invest time in reading novels, and the reason is that it gives us a feeling that we're genetically pre-disposed to want: a rush of the love drug. We're inclined to stay with the experience for as long as it keeps flooding our brains.

[2] The Heart of the Story: Peripheral Physiology During Narrative Exposure Predicts Charitable Giving, by Jorge A Barraza, Veronika Alexander, Laura E Beavin, Elizabeth T Terris, and Paul J Zak.

In other words, there's scientific evidence that stories trigger reactions in our bodies that make us feel close to the people within them. That's what helps us to make the transition from our own world to theirs, and is one of the key reasons why stories are effective at helping us to see the world through the eyes of others. Also, as you can imagine, oxytocin plays a critical role in helping us to resolve cognitive dissonance, because it relaxes our critical judgment and enhances our ability to cross divides.



Transportation

We've seen transportation happen with our clients many times, as they move from a position of skepticism about an idea to one in which they embrace a new way of seeing something. Transportation isn't a conscious, rational act, but a way of making judgments based on what we see and feel in the story. It's as if we temporarily lose our capacity for logical analysis, with the result that our thoughts are based purely on what the research participants are saying.

One of our participants transported herself into a story during a research session. She was trialing an e-commerce site that we'd pulled together; this was in the early days of the Internet, so it was pretty clunky by today's standards. Her assignment was to read a story that we'd written for her in which she was interested in buying a certain make and model of car, with a set budget. She was given a dummy credit card number and a fake address, so that she could make a payment. She was then asked to "shop" for the car on the website. A facilitator sat beside her throughout the process, prompting her to verbalize what she was doing so that we could understand her decision-making process.

As we watched from behind a one-way glass, we could see that the participant was becoming increasingly frustrated. She kept clicking on the wrong buttons and making errors—things weren't working in the way she wanted. Eventually she started to cry.

"I can't keep doing this," she whispered.

We immediately stopped the session and reassured her that it was fine to leave it. After she'd taken a break, we asked if she would mind talking to us about what the problem was. She explained, although not in so many words, that she wasn't trusted by her family to make financial decisions, and that this was why she was upset. Even though she knew that she was the main character in a made-up car-buying story, and that the credit card details were fake, she'd transported herself into the scenario to the extent that it felt deeply uncomfortable for her to carry on. It was as if her logical mind was telling her that it was "just" a story, but her emotions were telling her that she was breaking an unwritten rule. This is the power of transportation.

Evidence from researchers Melanie Green and the late Timothy Brock, of Ohio State University, shows that people who are transported develop strong feelings towards the characters in a story, and may alter their beliefs based on this.[3] For instance, imagine that you're watching a movie in which the main character is a thief, but a clever and charismatic one. The thief goes to extraordinarily dangerous lengths to steal things, and you can't help but admire her skill and courage. Normally you'd see being a thief as morally wrong (and you still do), but in this case, because of the transportation effect, there's a strong part of you that wants her to evade capture.

This is how a compelling narrative can help us to explore alien perspectives. And it's how, when our clients find it hard to see things from the research participants' points of view, experiencing a great story can help them to do so. They want to be part of it because they're transported into it, with the result that they suspend the kind of rational thinking that got them to where they are now in their career. They open themselves up to new views instead.

[3] The Role of Transportation in the Persuasiveness of Public Narratives, by Melanie C. Green and Timothy C. Brock.

Sympathy and empathy

Sympathy is about concern; it involves sharing a common feeling, most often when someone else is feeling sad or troubled. However, sympathy is often a passive emotion. Imagine walking past a homeless person asking for money; you might feel sympathetic towards their circumstances, but still not give them any cash. Your feelings were triggered but your behavior was unchanged. When we carry out research, we try to ignore sympathy because it's demeaning to the person; it's as if we see them as a cardboard cut-out of the problem they have. So while we often find ourselves feeling bad for our participants, as we did with the photography student who couldn't afford to finish her degree, it's not an emotion we like to give space to. (By the way, this isn't to say that sympathy isn't powerful or valuable, because it certainly demands our attention. And our attention is one of the most rare and precious things that we can give.)

Empathy is different to sympathy in that it involves seeing the world through someone else's eyes, almost as if we've become that person. As we strive to gain empathy with another we start to become open to their perspective on life, and begin to look at our own perspectives in new ways. It's far more powerful than sympathy as it can lead to drastic changes in behavior.

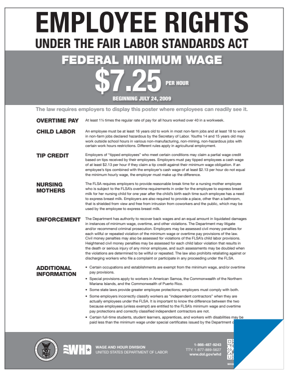
Because of immersion, transportation, and oxytocin release, stories are the ultimate empathy generators. For instance, we as authors have no idea what it's like to have been released from jail, or to be a 17-year-old college student in the present day. But if we can, through hearing a great story, empathize with people who have experienced these things, we can cut through the logic that says that we can't appreciate their situation.

We once worked with a tech company that enabled people to sign legal documents online. Its aim was to introduce new capabilities for small business owners, so we spent time with a selection of them to find out how they felt about their work. One of the most memorable stories we gathered was that of Alec, a father of two who'd bought a children's playscape two years previously. It had long been his dream to own and run one, and now it had come true, but he was already at the point of selling up. The reason? He'd slowly fallen out of love with the business.

"See all these files, and folders, and print-outs?" he said.

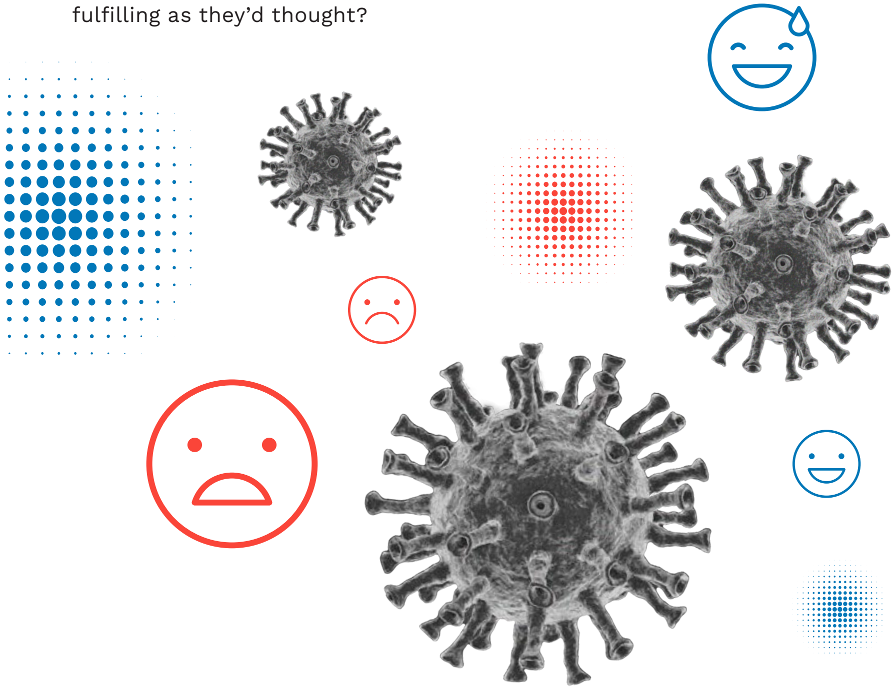
"I never realized that this was what it takes to operate a business. I've got contracts and forms everywhere, and they're sucking the joy out of it all. Rather than watch the kids having a great time in the ball pit and chatting with their parents, I'm in the office doing paperwork. And I suck at it."

He went on to tell us that he'd even been hit with an OSHA (Occupational Safety and Health Administration) violation because he hadn't put up the right poster in his staff room. He had no idea he was supposed to.



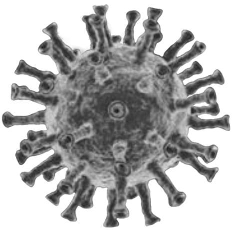
This story, and others like it, led us to realize that starting a business is an emotional journey. It's born in the sunshine of hope and passion, starts to dim its light once reality hits, and can gradually extinguish itself in the darkness of disappointment and despair. Should the owner accept that their dream is over, or live with the fact that their work isn't going to be as fulfilling as they'd thought?

By experiencing Alec's story, our empathy was switched on and we were opened to new ways of seeing his business. This involved us finding ways of making the operational side more engaging, which included simplifying the paperwork and regularly reminding him that there was a reason for it: to enable him to continue helping the kids.



Emotional contagion

We can think of a well-told story as being like an emotional sneeze: it makes us catch the feelings of the main character. By listening to the story we can feel what they feel, and we may even start to mimic their postures, expressions, and movements. Have you ever clenched your fists with tension during a movie chase scene, or furrowed your brow when the protagonist acts angry or confused? This is contagion.



Emotional contagion isn't as conscious a process as generating empathy. With contagion, we may not see the world completely through another's eyes and so our emotional mapping is less sophisticated, but we can still find common ground with them. This is the case whether the story is made-up or based on real life.[4]

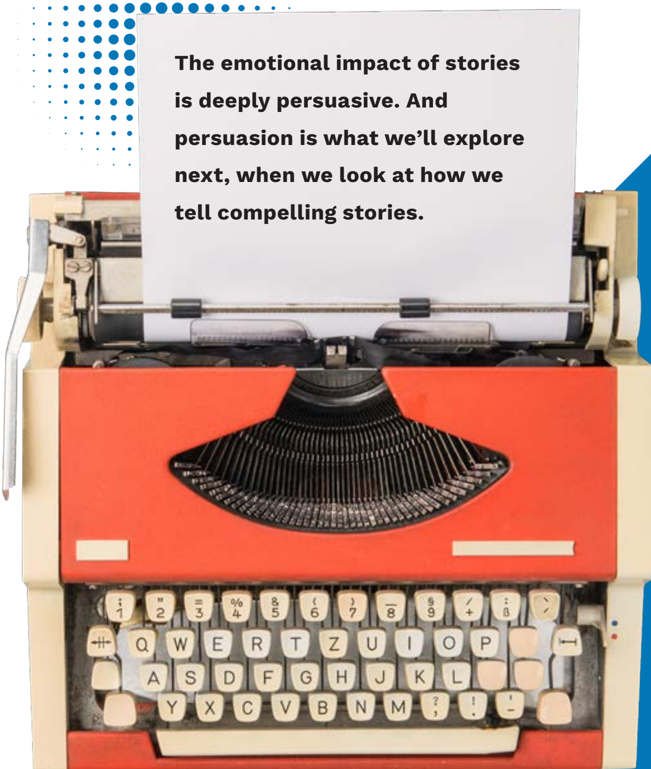
Emotional contagion is especially important when it comes to the telling of a story. When we're in the field it's relatively easy for us to empathize with the research participants because we're there with them. But for a client watching a presentation of stories back in the office, it's a different matter. They're thinking about what they're going to learn, whether they'll take action on any of the recommendations, and how they'll explain them to everyone else. They're "up in their head," rather than being emotionally available to new ways of seeing things. Contagion allows us to cut through that by passing on our

[4] Emotional Contagion, by Elaine Hatfield, Cacioppo Hatfield, John T Cacioppo, and Richard L Rapson.

empathy and the emotions of the people we've spent time with. It's about the relationship between storyteller and listener.

Contagion also comes into play during the design process. At this point, we're not so much concerned with stories but about whether what we've designed looks good, feels good, and solves the right problems. We're "infecting" our design with the emotions of its end users. This is why we always use the same team to carry out the field research, create the design strategy, and do the design; the contagion carries through. Compare this way of working to a more traditional division of roles, in which a research team does the research, presents it to the product team, and designers finally turn the data into actionable product decisions. A lot of designers would prefer to sit in front of their screens, but we have them go out and talk to people so that they can catch the wants and needs from them and bring those needs into their designs.

These emotional aspects of storytelling (cognitive dissonance, immersion, transportation, sympathy and empathy, and emotional contagion) are simply different facets of the same prism. They all point to the same thing, which is the fact that stories tap into our emotions like nothing else. When we're emotionally engaged, we're attentive to others' experiences and open to new ways of seeing things. What's more, we remember what we've learned and we're ready to re-tell the stories to others.


The emotional impact of stories is deeply persuasive. And persuasion is what we'll explore next, when we look at how we tell compelling stories.

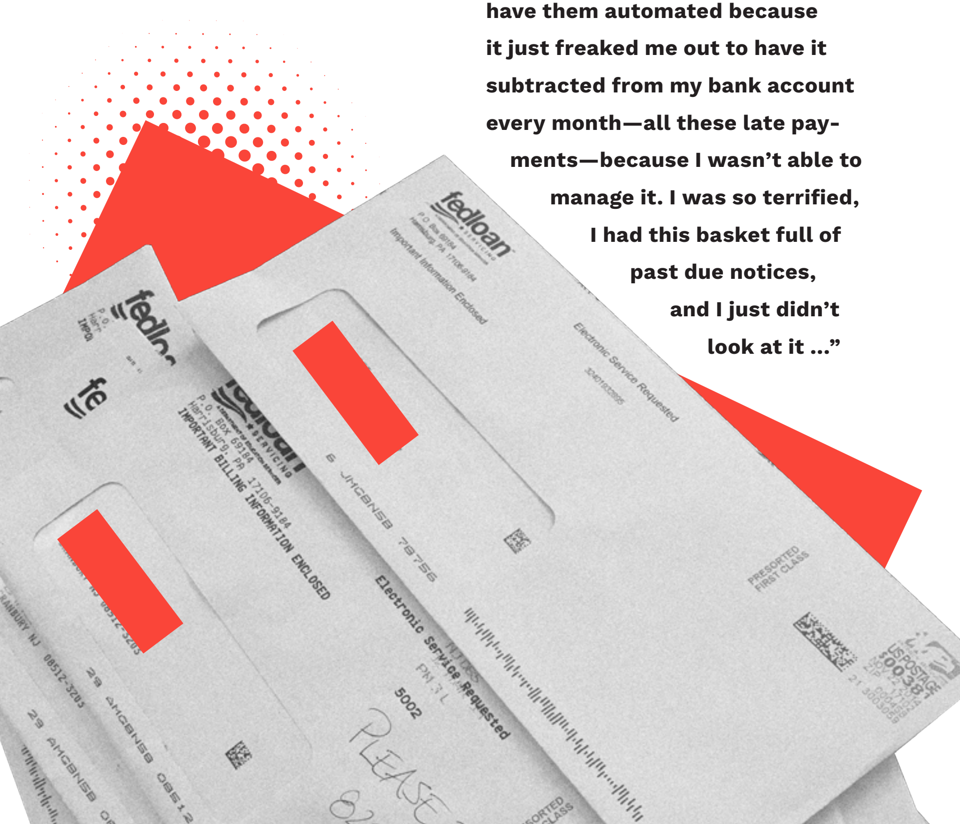
It's How You Tell Them

We're visiting Ashley, a biology major two years out of college, to talk about her degree.

As we get into the conversation, we ask if we can see any documents that are relevant. She brings out a small wicker basket. It's filled with at least 10 sealed envelopes that are all stamped with her student loan company's return address. She explains that they're debt notices for her student loans that come every month, and she's been terrified to open them, so she just saves them. We ask her if we can open one together; looking nervous, she agrees. After opening the envelope, she starts to read what's inside it aloud. And then she turns bright red and clearly becomes self-conscious, because she discovers that she's being charged interest on a loan that she didn't even know she had.

"I kept on getting these loan notices," she explains. "I almost defaulted and I had no idea, because I was like, 'Oh, I'll just ignore this'. But I kept getting stuff in the mail and was like, 'I don't have to worry about this!'

I'm paying the other two loans I had. It was just because I had no visibility into it, like they would come and I would … I didn't have them automated because it just freaked me out to have it subtracted from my bank account every month—all these late payments—because I wasn't able to manage it. I was so terrified, I had this basket full of past due notices, and I just didn't look at it …"



Imagine that you're an executive from the student finance company that's commissioned this research, and you're watching a presentation of Ashley's story. Even though you're 50 years old, have no debt, and make $200,000 a year, you're starting to see your company's product through the eyes of one of your customers. The experience makes you think. Like any business, you want your customers to feel comfortable with using your product—you certainly don't want to make them angry, upset, or embarrassed. Nor do you want them to be so afraid of the notices you send them that they let them pile up in a wicker basket unopened. You might then ask yourself whether you can change the way you do things so that you can help Ashley, and others like her, to have a better experience. This would be of benefit to both her and you, because she'd be less likely to default on her loan and your business would have fewer debtors to chase.

It's easy to see that this is a persuasive story for its audience. Part of that comes from the content: the indebted Ashley realizing for the first time how much financial trouble she's in, and her emotional reaction to the discovery. What's less clear, though, is the element of persuasion that comes from how we told the story to our client. This is a vital element of our storytelling, because we need our clients to believe in our participants' stories and be affected by them so that they'll want to help them through new design strategies. Equally, we want our clients to be able to use these stories to convince other people of their worth; if we can do a good job of telling them, so can our clients with their colleagues.

There are six areas that we'll look at as we explore the presentation of great stories:

- **Grabbing an audience's attention**
- **Selecting the best stories**
- **Keeping it real**
- **Skillfully combining visuals and quotes**
- **Showing rather than telling**
- **Knowing when and how to make insight statements**

Grabbing an audience's attention

Ashley's tale above is a classic example of an attention-grabbing story. It's personal, emotional, and contains an element of discovery within it (her realization that she has even more debt than she was aware of). If you were in the corporate audience for this story you would no doubt pay attention to it, if for no other reason than that you sympathize with her plight or you find it incredible that someone wouldn't open their loan notices.

However, not all stories are created equal in this way. Imagine if Ashley had already known that she had the extra debt and wasn't particularly bothered by it. Or if her parents had offered to pay off her loans, which meant that she could relax about the situation. Those might still have been worthwhile stories, but they wouldn't have gotten you to sit up and take as much notice. For a story to grab your attention, it needs to show people doing interesting or surprising things, otherwise it won't be persuasive—it'll be boring.

Having said that, boring isn't necessarily bad, as some of our clients are a little wary of material that prompts a revolutionary product innovation; they're looking for more incremental change. But generally, the stories that capture people's attention and imagination are persuasive out of the gate. They make our audiences think:

"Wait a second, did she really do that?"

Selecting the best stories

When we carry out research in the field, we usually spend time with as many as 20 to 30 people. Clearly we can't tell each one of their stories to our clients and still make an impact, because we might only have time for two or three of them. And within each of those, there may only be the opportunity for us to make a small number of points. We have to be picky. Just as not all stories are created equal in terms of being compelling, so some stories lead more directly to a creative design strategy than others. How do we select which ones to use? This is both an art and a science.

The first thing we do when we return to the office after visiting people in their homes or workplaces is to print out the pictures we've taken and transcribe the audio. Then we dump it all into a Google spreadsheet, which effectively becomes a database of everything that all the research participants said and did—a huge amount of data. Next we create a card for each of the participants'

statements, with one thought or quote per card. We go to our studio wall and adhere pictures of the people, along with all their cards—this can amount to around 5,000 pictures, papers, and sticky notes. Our entire studio is then covered with data from the research.

This is overwhelming, so we need to find a way of grouping and eliminating some of the data.

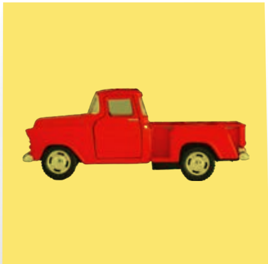
We begin by putting cards that seem to be related to one another into groups. The easiest and most obvious way to do this would be to group them by noun, such as "technology," but we avoid this method.

We call this "red truck matching," and if I give you a made-up example, you'll see why. Suppose we have two quotes by participants about red trucks:

My dad used to drive this great red truck. I miss him a lot.

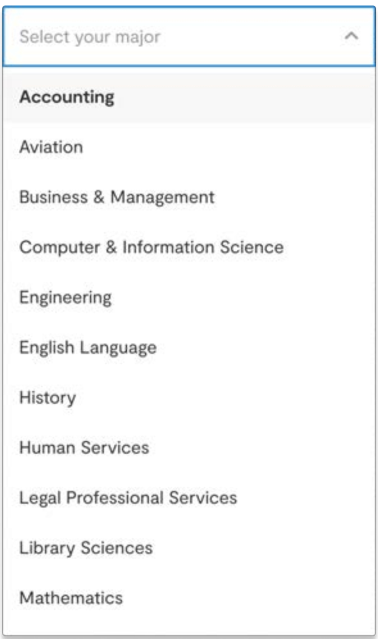
and

I bought my kid a Hot Wheels car; it was a red truck.



If we were red trucking we would group these quotes under the noun heading "red truck," implying that their only commonality is that they're about trucks that are red. That seems logical, but it misses the human elements of the statement. Far more helpful would be to group the quotes by feelings or behaviors (usually a feeling related to an activity), such as "Vehicles trigger nostalgia and emotions related to family life." An example related to Ashley's story, for instance, would be the label: “Anxiety and fear around paying off debt is embarrassing.”

Let’s walk through a real-life example of how the process of selecting and grouping the data works. As part of some wider research into how college students make the transition from college to university, we spoke to a number of them about how they picked their majors. One woman had chosen accounting because it was the first choice in the alphabetically-sorted drop-down list; another decided not to pick English because “I already speak English”; one student selected the same major as his best friend; and another chose the major that his parents had expressly forbidden her to take. These discoveries led us to group the quotes within the heading: “Major selection can be arbitrary.”

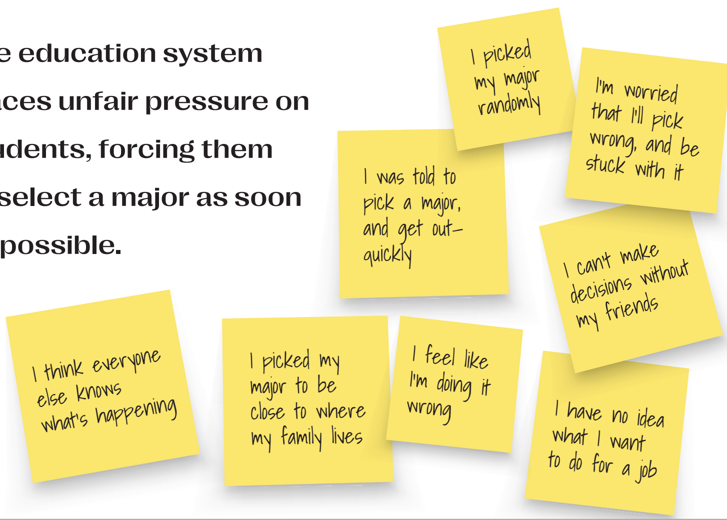


Whenever we do this, it’s important that we retain a strong through-line from the raw data to the groupings, and that this is reflected in how we store our information. We add our groupings and themes to the master spreadsheet so that both we and our clients can track back to where they came from. We also use the spreadsheet to search for quotes and pictures related to the research. In this way, the document becomes a bank of knowledge for anyone who wants to carry out further analysis of the research.

Key to this process is the creation of concept maps. You can think of these as being like mind maps. At first our concept map for a project is just a sketch of groupings on a whiteboard, but as we look more closely at the potential connections between the groups we start to see centers of gravity. There might, for instance, be six groupings that have a relationship with one another. At this point it's tempting to start red trucking again, but we hold back from that. In our research into major selection, for example, our larger grouping was around the unnatural system that's been set up for 18-year-olds who are choosing their majors, and the unrealistic expectations placed on them.

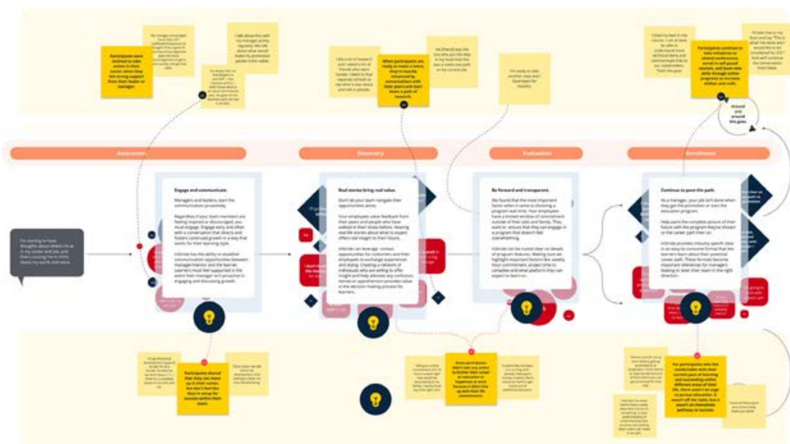
We create the concept map as early as possible so that we can start to structure our conversations around what would otherwise be an unorganized mass of data, even though we know it will be wrong at first. We want to get to the simplicity that lies on the other side of the complexity

The education system places unfair pressure on students, forcing them to select a major as soon as possible.



and visualize it. The map is simple enough that busy executives from our client companies can understand it, but it's still based on the raw truth of the stories we've heard. In that way, it becomes a container for all our top-line thoughts about the research.

The concept map is also a picking tool for which stories we should tell—it helps us come to an understanding of the best stories to choose. Sometimes we pick a story because it's crazy and attention-grabbing, and sometimes because it points to non-obvious behaviors, but mostly we choose them because we know that there's something in them that's worth talking about. The selection is the product of both gut feel and rational analysis.



Keeping it real

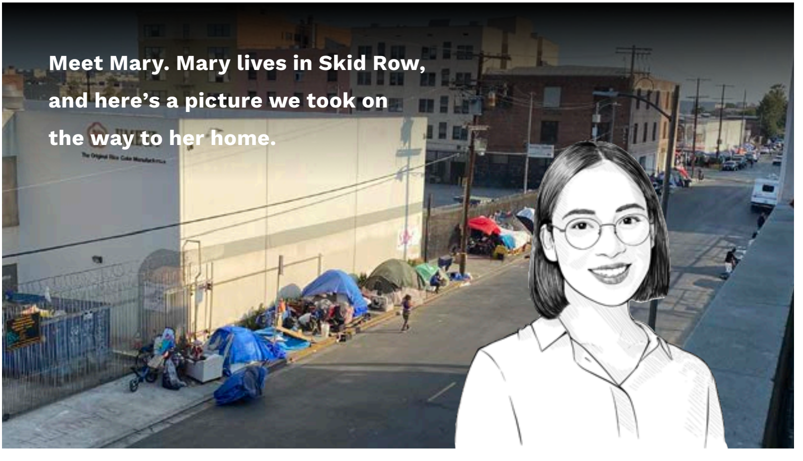
For a story to shape a design strategy, it has to be rooted in reality. Our stories don't use fictional characters or personas—they center around actual people doing real things. Gina the career counselor is real. Alec the playscape owner is real. Ashley the biology graduate is real. It's the realism of our participants—their quirks, comments, and expressions—that enables us to bring them to life in a boardroom in front of clients. And it's also how we give them a voice in the process of developing new products, services, policies, and strategies.

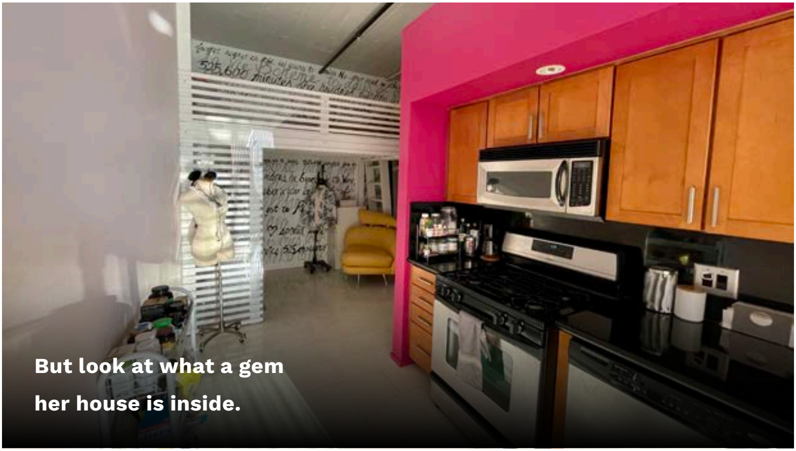
Of course, our participants aren't there to tell their stories to our clients in person, so we have to make sure that we're ethical in the way we collect and tell them. We're always transparent about how their stories will be used, and we repeatedly ask permission before we take any photos or recordings. Even though we curate the people's stories heavily, we try our best to stay true to what they told us—to give them a meaningful voice in the design process.

Skillfully combining visuals and quotes

As part of a project for a real-estate client, we went to visit Mary, a woman who lived in the Skid Row area of Los Angeles. Skid Row is a district with a large homeless population and a long history of poverty and crime. But while the neighborhood was filled with graffiti, trash, and people experiencing homelessness in tents up and down the street, the inside of her home was unexpectedly beautiful. It had high ceilings, lots of natural light, and some lovely original features. Mary explained that for her, the way she felt about the building outweighed the way she felt about its location.

How did we tell Mary's story to our real-estate clients? We boiled it down to three slides, taking less than a minute in total.





But look at what a gem her house is inside.

And finally we showed a quote from Mary summarizing the disparity between inside and out.

> “Outside? This place is a pile of shit. But in here? It’s perfect. High ceilings, the vibe—perfect.”

Next we told the story of Brad, who had a personal revelation while staying at home during the Covid pandemic. He and his (previously unfamiliar) neighbors got into the routine of ignoring Covid protocol and gathering by the pool, where they started to become friends. The sense of community he gained from this taught him that when he next moved neighborhoods, he should look for one that felt connected and friendly.

The way we presented Brad's story was to say:

"Meet Brad. During Covid, Brad was stuck in his apartment, but got to know his neighbors while they gathered around the pool."

While explaining this, we showed a picture of the pool.

And then we leverage a quote from Brad, talking about his transition from not knowing anyone to becoming friends with them:

> “We never hung with our neighbors before COVID. This has been pretty transformative for us—in a good way.”

This is fairly typical of our visual presentation style, which is based on showing full-screen images and quotes, and no bullet points. The images and quotes are essential for conveying the realness of the stories. Of course, our clients know that the people we’re describing exist, but reinforcing this through photos, videos, and the actual words they used makes all the difference to how believable they are.

After we introduced Mary and Brad, we led a discussion about their lives and experiences. We showed additional photos and videos, and dived into the tiny details they shared with us. In Mary and Brad’s example, the insight we gave at the end of their stories was that people were looking for homes based on the vibe and emotional quality of the house and neighborhood, not necessarily just on pragmatic criteria such as square footage and cost. That’s not to say that the practical aspects weren’t important, but it was the emotional elements that were tipping the scales in favor of buying a property.

The implication for the real estate company, and part of our design suggestion, was that they could give their customers a way of browsing for properties by neighborhood vibe and other emotional qualities. We weren't saying this was technically possible or even monetizable, only that it would give people what they really wanted. The visuals and quotes from Mary and Brad enabled us to present them as real people with real hopes and dreams; given that our objective was to inspire the executives to envision a different way of doing things, this was important. The difference between this and simply showing a set of bullet points with the same information was huge. The visuals brought the participants to life and even ended up acting as vetting criteria for new ideas: "What would Mary think about this? Would that give Brad what he's looking for?"

You can probably imagine how important it is for us to take lots of photos and videos when we carry out field research. We want to be able to show exactly the right images to support our statements, and given that we don't know at the time exactly what those statements will be, we have to take hundreds of shots just in case we miss the most appropriate one.

Pictures give people depth, bring out their complexities and contradictions, and bestow them with a more complete voice than words alone. They also help us to be specific. When we hear great stories our imaginations can run wild, but when we're presenting a story which is grounded in research with real people, we don't want our audience's thinking to go off track. We want it to follow a precise path because we're building a persuasive argument. Our aim is to bring our participants to life in as rich a way as possible, so that our clients can see the same things that we saw, and therefore feel the same way that we felt.

Even worse than not using visuals and quotes is to use bullet points or text summaries. Much beloved of presenters the world over, bullets cut out the most important aspect of the stories: the people themselves. They gloss over their behaviors, needs, and desires, and turn them into thin abstractions. Photos and videos make people real.

Showing rather than telling

Screenwriters and novelists have a trick they often deploy when they want to draw audiences into their stories: it's called "show not tell." Think of an action movie, for instance. The scenes move swiftly from one to another, jumping between different locations, actors, and strands of the story. You don't learn everything there is to know about the characters, only what the director chooses to show you. If you're in the audience, you're constantly having to fill in the gaps yourself so that you can make sense of it all. The result is that you're invested in the movie because it's almost as if you're a co-creator of it.

In the same way, when we present our participants' stories we're careful not to fill in too many of the blanks; instead, we leave this to our clients. This means that they're able to give part of themselves to the story and feel a sense of ownership over it. And it's partly from that ownership that the desire to help the participants comes.

It's also essential that our clients are personally invested if they're to progress our innovative design strategies internally in their organizations. Championing a new cause with people who don't have the same level of understanding as you is no easy feat, and the unfortunate fact is that we can't be by their sides forever. We need them to stay in the game long after we've left the project (and even while we're still there). It's therefore vital that they see it as their creation as much as ours.

Knowing when and how to make insight statements

When we interact with research participants in the field, we're mainly concerned with gathering as much truthful evidence about their lives as possible. Although the odd idea might come to us there and then, and often does straight afterwards, it's only when we have all the stories gathered together that we're in a position to make insight statements about what they're telling us.

An insight statement is an assertion about the data, usually expressed as an idea. Cast your mind back to our description of how we group the material from our participants, using feelings and behaviors. Eventually we generate around 40 to 50 groupings, which are all displayed on our studio wall. These groups are the results of our insights about what the meaning of the data is.

When we've finished with that, we can make further statements about potential solutions to the problems we've identified. These come as a result of a number of activities. We recall our experience of talking with the participants, we bring in what we know about our client's industry, and we combine this with the signals that we've received from the market by watching their competitors. The stories now become visuals of the future, not of the past with its inherent problems. They allow us and our clients to have conversations around whether it's even possible to do what we're suggesting, with our participants providing the vetting criteria. It's as if the participants give us a sieve through which we can pour our ideas, seeing which ones stick and which fall through the gaps.

Taking the example of the students who chose their majors based on factors such as what their friends studied, our insight statement about that grouping was that college students pick their majors based on a lack of understanding about the subjects and the related career opportunities, and that this often results in wasted time. It's worth noting that although this assertion came out of the interviews we did, nobody actually said it in that way—we simply absorbed the idea from watching them. Our next assertion was: "Therefore we should find ways of minimizing anxiety for students when they pick their majors, and help them to understand that their decisions aren't permanent."

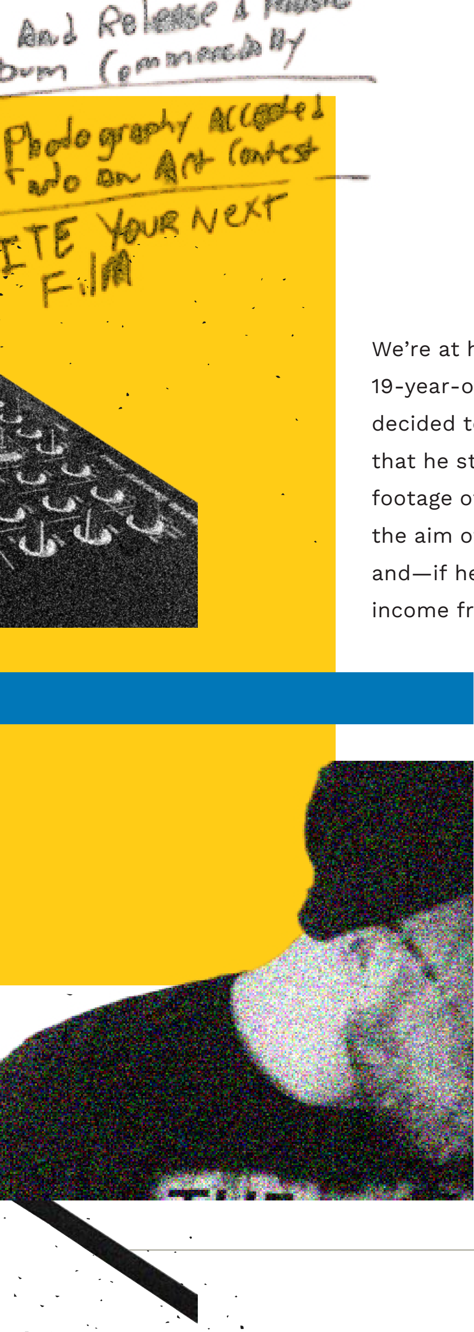
Throughout this whole process we work closely with our clients, from carrying out the field research, to grouping the quotes, and to making insight statements about what we've learned. This means that our clients have been along for the ride right from the start; if they're not keen on progressing an aspect of the research, we can go down a different route. There should therefore be no major surprises for anyone when we finally present the stories, because everyone is already on board with the direction we've chosen to take.

In the next chapter we'll look at how the generation and presentation of stories enables us to create design strategies which solve people's problems in ways that they could rarely imagine for themselves. This is, after all, the end purpose of all the research and analysis we've done up to this point.


automatic stop
MICRO
VOLUME
CASS.
RECORD
START
STOP

The

Final Story



We’re at home with Jack, a 19-year-old musician. He’s recently decided to turn “professional,” in that he streams live and recorded footage of himself on YouTube with the aim of building an audience and—if he does well—earning an income from it.

As we watch him film a video for later, he lets out a pretty aggressive cough mid-song. We ask him if he's planning to edit out the cough from the footage, and he says, **"No, I don't know how to remove stuff like coughs. But it's fine, there's no problem."**

Later, as we review our research material from Jack and other DIY-ers we've visited, we reflect on what we know about the music publishing and streaming market as a whole. It's clear to us that it's a show, and that if musicians want to be successful they need to pay attention to the details of how they come across. The pros making all of the money have high quality equipment and spend time on post-processing. Listeners expect them to be good at music—that's a basic requirement. It's the other things, such as production quality and the personality of the musician, that bring the footage to life. This can be a frustrating surprise for new musicians who are looking to build a personal brand and grow an audience. When people visit their feeds only to leave soon after, they often wonder why, and it's only when they've become more experienced that they realize how much the "non-music" elements matter.

From this we had the insight that music streaming or recording isn't about music, it's about branding. And that our client, a microphone manufacturer in this case, could help streamers by providing top-tier production tools to make them sound good without needing to have any technical know-how. This led to the idea of building a cough detector into the mic software, which would automatically remove a cough from a recording without the speaker having to do

anything. We didn't try to change streamers' behavior or suggest that our client could teach them how to use a cough removal tool, we simply recognized a latent need that musicians like Jack didn't even know they had.

If you remember the story of the students who felt anxious about choosing their majors and opted for the wrong ones, you can see the parallels with how we interpret the stories we've generated. We come up with an insight statement about the participants' needs, and then a subsequent "therefore we should" statement about how we could meet those needs. Whenever we do this, for whichever project we're working on, what we really do is create a framework for imagining new ideas and determining if they're good enough.

We call this "subjective objectivity." The boundaries we set around what we should make are subjective because they're based on our insights, but within them are the objective criteria created by the research. In other words, the insight about what the underlying need is and how it can be met is by necessity somewhat subjective, even if it's based on what we've seen people do and our information about our client's market. But the criteria by which we judge whether our ideas will work are objective, in that they're rooted in the participants' experiences. Is it important for music streamers to present themselves professionally on YouTube? In our view it is, although that's our subjective judgment based on what we've seen in our research and what we know of the market. And, given that, would Jack find an automatic cough removal capability helpful in his quest for YouTube domination? Objectively, he would.

To us, the cough removal facility is a capability. It's a bit like a feature, but we try to stay away from that word because it can imply that it's mutually exclusive with other features, and that users can pick and choose which feature to access. For instance, going back to the students picking their majors, our assertion was that we should create a new system that registered them for classes in a way that minimized their anxiety and showed them that their decision-making wasn't permanent. But this was too broad to be one feature—it was actually a series of interlocking capabilities that helped students to understand the pros and cons of choosing particular classes, in terms of whether they'd be able to change their minds later if they wanted to. As an example, one of these capabilities was to provide an option which encouraged students to pick some of their general education classes before their major-specific classes, so that they weren't locking themselves into their majors too early on.

Of course, this capability wouldn't be enough on its own for college students to abandon the process they were already using, or for an academic institution to throw out their current system and switch to a new one. There had to be a stew of ingredients in the design strategy that made up enough capabilities for a proper value proposition. Once we worked out how they interconnected, it was if the capabilities made up a larger storyline—one that described the new journey the students would embark on as they used the revised process.

Hero flows

After we've established five or six insights and "therefore we should" statements, our next step is to do two things: create hero flows that describe how we envisage people using the new product, and road maps of how the flows can be made into reality.

A hero flow is a sequence of steps that a customer or user takes in order to accomplish their primary goal. We start by identifying the goal, which in our example would be: "I need to declare a major in order to gain the degree I want." Major selection is therefore the goal activity. In reality there may be more than one goal for a flow, because the academic institutions who buy the software for the students to use won't necessarily have the same goal as the students themselves. For instance, they might want to move the students through the process as quickly as possible, without worrying too much about the anxiety aspect. That would be fine if it was something that had come up in the research, for instance if Gina the counselor had identified that she wanted students to choose their options more quickly. But if it didn't, we wouldn't include it. We always stay true to the original stories.

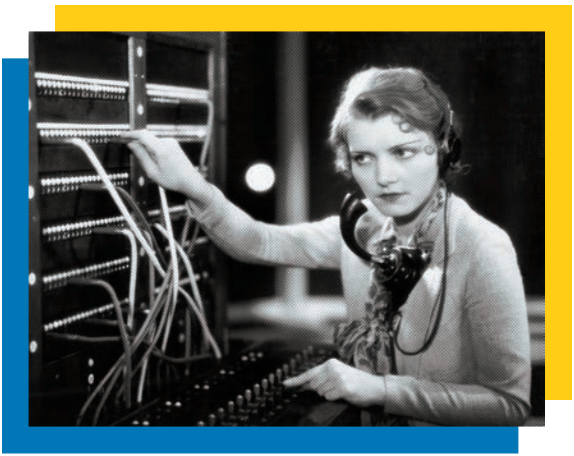
Now we have a goal, but how will our students reach it? There could be a number of steps. They might come onto the online platform for selecting their classes and see a series of choices. They pick a choice, and then see a helpful message which advises them that they're excluding themselves from certain other choices if they choose that one. There's also a recommendation of a different route that they could take. So they select that route, and see another set of options. And so on. We write this as a story, which might start something like this: "Jim is a sophomore at the University of Texas. The day comes when he has to register for classes. Jim opens the online portal and logs on . . . “

This linear hero flow is deliberately optimistic—it paints a beautiful picture of how everything will be great when people follow it. We make it like this because we’re trying to create a vision that everyone can get behind. The idea is that our participants’ stories, combined with our ideal solutions, will create a groundswell of enthusiasm in our clients. It’s only with this positivity behind them that they’ll feel enthused to take the product to the next stage.

A great deal of any debate that’s sparked by the hero flow is about what’s the right thing to build. We have the data (the stories) to support what’s right for the customers and users, and our clients have the data about what’s right for the market and their business. In a perfect world there’s a considerable amount of overlap, but even if there isn’t, there’s usually a sweet spot somewhere in the middle. Finding this can take a lot of talking, and drawing. We can lead our clients so far, but ultimately it’s their decision and our role is to help them to reach one that they feel comfortable with (as long as it’s within the boundaries of the objective subjectivity that we mentioned earlier).

In reality, within the five or six journeys that our hero is traveling along, there may be a cast of other characters involved. For instance, the system for picking majors might coordinate a referral to a student counselor like Gina, and after she’s done the work she needs to do, it reverts to the student. Any time a person other than the hero plays a role, we highlight it. A good example of this is when we design products for heavily regulated industries such as insurance. We might include a hand-off to the company’s underwriters, which signs off that part of the process, and then returns the flow to the user, because we recognize that step is non-negotiable (even if undesirable).

Our hero flow is different from the traditional process flows created by software developers in that it's based on stories, not requirement lists. Developers often write use cases, such as "Jim clicks the button labeled 'Register'. After that, the screen displays the following items . . . " These are devoid of the nuances of humanity. Of course, we'll need these kinds of functional processes to be set out later, but for now we avoid boiling down human behavior into a series of bullet points. We want inspiration and optimism instead.

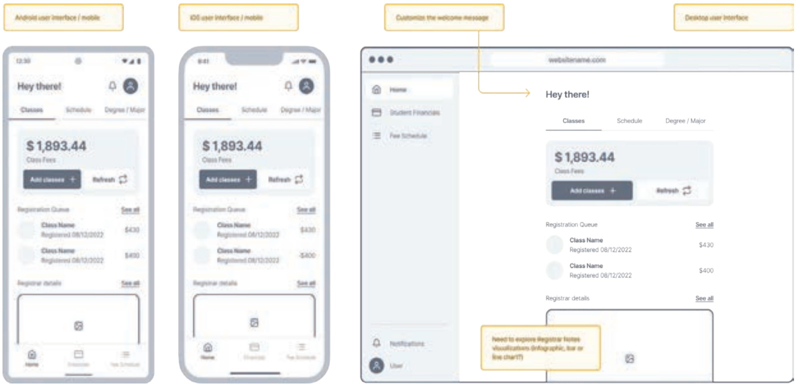


Wireframe testing and beyond

Our hero flow story is now written, but it's a conceptual narrative. It needs to be made into a concrete series of steps which depict how we envisage users achieving their goals. To this end, we create a series of "wireframes." These are black and white screens which show the software as the user will see and experience it, but they're plain and rough. We print out the screens onto pieces of paper and show them to our research participants, saying, "You know what? This isn't real. It's only on paper and we haven't even designed it to look nice yet." We find this to be the best way of gaining feedback that takes into account people's natural reluctance to upset the status quo; if they know that the work is just a draft, they feel OK about criticizing it or making suggestions for changes.

By having trial users go through the process of "using" the software, we gain insights into what they think about it. We do this by showing the participants the pieces of paper, with one of us acting as a manual computer. "Here's your activity," we say. "How would you start?" They might reply, "Well, I'm going to click on that." And we say, "OK. Pretending that you clicked on that, here's the screen you would see." We turn over the next piece of paper and ask similar questions about it. Or we do it the other way around, so that when they click on something we tell them that if they'd pressed another button they would have seen a different screen, and we ask them to explore that. We keep things simple by not including all the flows that they could travel along, but we want to know why they picked the ones they did rather than the ones we were thinking they'd choose.

Although the wireframe has no color, iconography, or pretty pictures, it does contain the language that we envisage using in the final product. We never



create screens with fake wording or “lorem ipsum” filler text. More often than not, real information on the screen is a key ingredient to understanding if a concept resonates with users. For instance, what might originally have been called the “Course entry” screen for students choosing their majors now has the following text instead: “Welcome, [User’s name]. It’s time to pick your classes.” The human elements of the vocabulary, work-flow, and hand-offs can point us to any emotional stumbling blocks that might lurk under the surface. Suppose we realize, from our field research and user testing, that students are unlikely to complete the process in one go. They feel overwhelmed and need to take a break, or maybe they become distracted by other things. We might then decide to build a “save” feature into the system so that students can come back to their application later.

It’s worth pointing out that we should always be able to track the decisions we make back to the participants’ stories. Take the example of the “save” button. If we were to introduce this, we’d ask ourselves if anything that we saw during our time with students led us to believe that they would abandon the process of choosing their major if saving it wasn't possible. If we witnessed people like Jim feeling overwhelmed by the experience, we'd include this type of stop-and-come-back capability. This helps us to vet whether what we're proposing is right, or whether we've gone off track and are designing what we want based on our own opinions.

We usually carry out two rounds of wireframe testing. It's rare that we have to scrap what we've done and start over, although that does occasionally happen. Most of the time the kind of feedback we receive is along the lines of, "I didn't understand that page. I didn't see the words I was looking for when I clicked on that. And what I saw next was surprising." This gives us valuable data for the next round.

Our next step is to apply a visual design to the black and white layouts. If our client has a brand language, we work it into the visuals in a way that still supports our users' goals, and everything now starts to come to life. We're looking at things such as the color of buttons, the placement of labels, and the words and imagery that users see. This dictates the tenor of the users' experience—the aesthetic, emotional feeling of it.

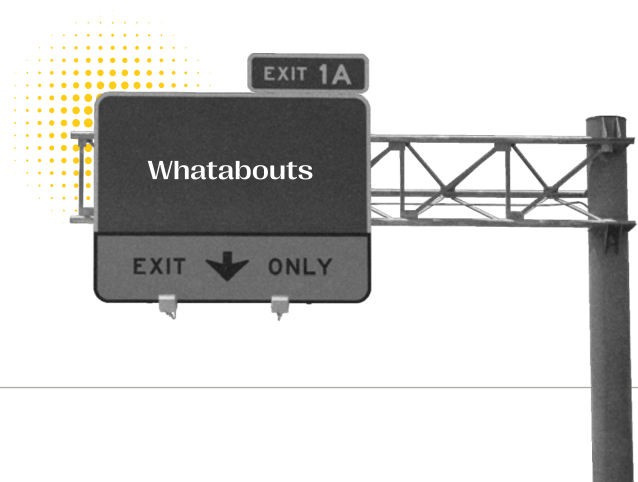
A great example of how design can dictate how using a product feels is a popular online project management tool we use in our own business that you may recognize. It gives a visual "high five" when we complete a task by showing a rainbow unicorn flying around. Because of our experience with designing products, we know that it wasn't included by accident. It was probably as a result of the product team thinking about feelings, not just actions. They could have decided that other features were more important, but they didn't—they prioritized this one and assigned money and resources to building it. In the same way, when we think about how to help students feel less anxious about choosing their majors, we want to make sure that the way the system feels to a user minimizes anxiety. We achieve this partly through what we design the system to be able to do, and partly through how it looks.

Our hero flows are now aesthetically appropriate, emotionally sound visualizations of the new software. They look realistic because they resemble the finished version, and they also represent what the product should do for people. We have a vision of the future; it's not the complete product, but it's the hero flow through the experience. And it's important that the visual flow stories at the end are just as persuasive as the participants' stories at the beginning, because our clients need to believe in the proposed solutions just as much as they did in the original needs and desires of their customers.

Road-maps

Our final activity is to create a road-map. This is essentially a diagram which shows the sequence of work to be done to create the capabilities we've specified, and it plots a progressive pathway to more and more value. In terms of what gets developed first, we want to give our clients and users the most value as quickly as we can. Software developers often prefer to build the hardest thing first—it seems logical to them to knock out the difficult stuff before tackling the easy pieces. But sometimes the elements of a capability that are the hardest to build are the ones that users care about the least. We want to prioritize the most important ones, which means that there needs to be some give and take between the design strategy, the developers, and the client's business.

Another way that things can change during the road-map creation is that developers identify potential pitfalls in the hero flow. We call these "whatabouts." A developer says, "So Jim clicks on 'explore majors' and sees a map of the majors. But what about if we don't have all the majors listed? What about if the system doesn't have all the current data for that year? What about if Jim wants a list, not a map?" This is often defeatist—it's easy for us



to “whatabout” ourselves into inaction. We try to retain the optimism of the hero flow story while we react to the pragmatism of the developers’ thinking, with the result that we create something that’s both practical and transformational for users.

These roadmaps are not yet a detailed breakdown of stories and sprints. That comes later. Instead, they break a concept into key chunks of value that loosely map to a time cadence that makes sense for the client’s business or development process. We call these chunks of time “milestones.” Depending on the business, each milestone of delivery might represent a quarter, half, year, or more. The key to building a roadmap at this level is to describe specific outcomes that the user should be able to achieve at each stage. In this way, they can begin to think about how to break apart functionality into chunks that work together to support a larger goal.

The hand-off

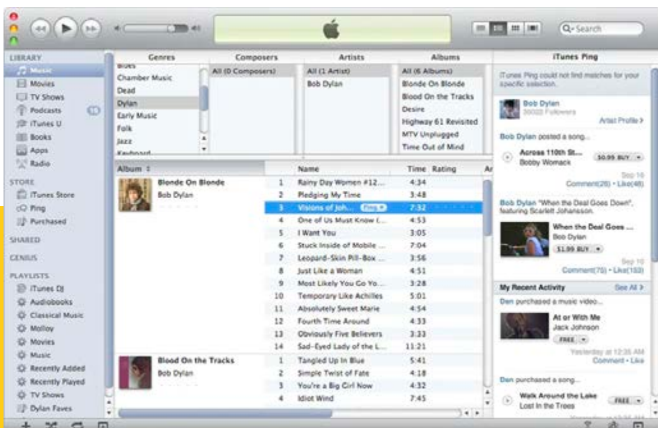
The completion of the road-map is usually the point at which we hand over to our client for them to create the new product. However, in the grand scheme of the product coming to life, this moment is nowhere near where it ends. We know that there will be many tasks ahead before the job is done, but also that it matters how they carry them out. We encourage our clients to think about the process they’ve been through with us—learning about their customers through the research participants’ stories, and creating new product stories based on them—and to do it themselves, continually and “forever.” We hope that it will stop seeming like a set of steps and become their preferred way of doing business too.

In a way, we're trying to change the DNA of a company, which is almost impossible to do quickly. If the business has been around for a long time and has its own way of working, we'll be pushing a rock vertically uphill if we instantly expect it to be more like our own. Some companies manage to transition out of their culture, but most are stuck with what they have. Take the example of General Electric under the leadership of Jeff Immelt. His aim was to turn GE from a manufacturer of heavy industry products to one that was also a software innovator, embracing the world of digital. So he invested billions in hiring software teams, designers, developers, and product managers. And yet there was a huge culture clash between these new people, with their agile approach, and the engineers and designers who had been working there for years. The latter were accustomed to taking 20 years to build an aircraft engine to a safe standard; it was unthinkable for them to speed it up and release it in stages as the software developers would do with their products. Despite all the money poured into the culture change, GE Digital failed, and GE ended up returning to its roots in industrial equipment.

Although we can move the Titanic only a little to the left or right, it's still a worthwhile aim. We know this because we spend our professional lives finding ways to improve products which, early in a company's history, were created purely to land new customers. This is short-term thinking, which is a great way to start and grow a business or product user base, but not so good for sustaining it. Over the years, the additional features add up and often lead to a Frankenstein mess which we're later charged with tearing down and rebuilding.

A classic example is Apple's iTunes. The software started with a humble purpose: to help customers play digital music. Yet over time, it evolved into the center-piece for music, video, podcasts, device syncing, purchasing, device backup, recovery, and more. This wasn't deliberate, it just kind of happened, because the company didn't have a plan for growth. You can imagine how, without a proper strategy, the software slowly became a shamble of complexity. It had been created with the best of intentions but at the expense of a logical, thoughtful whole. Eventually it became unusable without specialist knowledge, so the company started to embrace a modular, non-iTunes-media eco-system. Now, individual apps, and services, like Apple Music, are the centerpiece for Apple's media—yet iTunes still exists as a massive and complex legacy reminder.

This shows how a product with promise can grow into a bloated mass of features if there are no user stories to guide its devel-opment. However, when design strategies are based on an authen-tic and consistent storytelling approach, they stand an excellent chance of giving birth to products that delight the people they're aimed at, right from the start.



Source: www.macworld.com

Conclusion

“I’m a mechanical engineer. I create massive, physical telecommunications infrastructure to defend our troops abroad. I need a metal ruler to do my job. But nobody will pay for one! If I want a ruler, I have to buy it myself. But check out the office up the road—they’ve got friggin’ pool tables and free lunches. And I can’t get a ruler! Is that too much to ask?”

This declaration came from a woman at the end of our week at a large defense contractor, where we’d been spending time talking with employees. We were brought in because the business was desperate to recruit more cybersecurity experts but was having trouble tempting them away from the likes of Google, Facebook, and Apple due to its poor reputation. “What is it about our culture that’s not attracting these people?” it wanted to know. We went inside to find out.

The first building we were ushered into was a brand new, glittering box of glass and steel. It would have looked right at home in Silicon Valley. There was free food, a suite of pool tables, and a courtesy bus—the whole nine yards. This was the office that had been created for the software developers whom the business was wanting to attract, a move which made sense given the brands it was competing with. Then down the road was another branch of the same company, this time a drab industrial unit staffed by engineers who designed physical products such as radio antennae for troops in battle—vital safety equipment for saving lives.

There we discovered a huge animosity towards the shimmering office up the road. After poking around this for some time, we finally received the feedback above. It was clear that there was a crazy financial mismatch between the resources allocated to each division, and that the engineers were angry not so much about the state of their offices as about the fact that they didn't have the basic tools to do their jobs. Our recommendations to the executives were therefore based on how the business could change its policies and ethics so that employees felt as if they were being treated fairly, and were equipped to deliver the innovation that was necessary.

This was a somewhat unusual project for us, in that it resulted not in a new product but in new ways of managing people. However, it still points to the value of telling stories about people's experiences—an activity which is being increasingly acknowledged in all business sectors. Two decades ago, when we started our careers in design strategy, we'd regularly have our proposed research budget rejected in favor of spending in other areas of product development. So if the allocated spend for a program was $100,000 and $30,000 was for field research, it was a hard "no" to the latter. But today we regularly run $500,000 programs that are purely for research. There's been a sea change in attitude, as executives realize that real-life stories matter—both as a way of getting to great design and as a way of creating it.

You may have heard of a product design framework called "Jobs to be Done." It says that the purpose of any product is to support a job to be done, so "we hire a stove" in order to complete the job of cooking and eating, or we "hire a car” to complete the job of going somewhere. However, we think that this way of seeing products is wrong, because life isn’t a series of jobs, it’s a set of experiences—ones that we create for ourselves by using the products that companies make.

Instead of thinking about the world as a series of jobs to be done, we think about it as a set of opportunities to find emotional value. Of course, not all products have to take emotions into account—we don’t want to burst into tears every time we brush our teeth. But many products do excite emotions, and many people do care about them, and the notion of a job to be done doesn’t allow for that.

Emotions are human, and good designers bring humanity to products. Think of the fundamental difference between a Tesla and any other electric car: the Tesla feels as if it’s made to be a digital experience in a way that no electric car made before it does. In a Tesla, everything is inter-connected. If you want to open the sunroof, you can drag down on a screen and your sunroof retracts along with your finger. That’s a whole different experience to pushing a button. There’s a human aesthetic that’s created when a great designer gets their hands on something, and it isn’t just about how the thing looks. It’s about how it’s experienced, and the value the experience brings to the person using it.

This becomes evident when you think about how many products and services aren’t people centered. If you look at your TV remote, you’ll see what I mean. It probably has a bunch of buttons and labels which mean little to you, and most of which you don’t use. It lacks a basic consideration of humanity—the understanding of what people experience when they use it. Products should be designed from the perspective of their users, not of manufacturers who cram in as many features as possible. No-one should have to adapt to a product—it should be the other way around. Stories help to create better products because they embrace the humanity that should be at the core of any product design. Design has evolved from being about colors, materials, and finishes and is now about journeys and stories—the emotional or transcendent or banal things that we do on a daily basis.

We're optimistic about the world embracing stories as being integral to design, just as we are about how we can create better products. Many designers have trained themselves to see the world as broken, with design being the key to fixing it. However, a good designer is always able to see the sunnier, optimistic side; they spot problems and work to solve them beautifully, instead of focusing their energies on simply moving away from the problem. It's a subtle but important difference.

When we create a design strategy, we help companies see the future and then get there. That's the story we tell. Evangelizing for this is our mission—and we invite you to join us on the journey.

The Authors

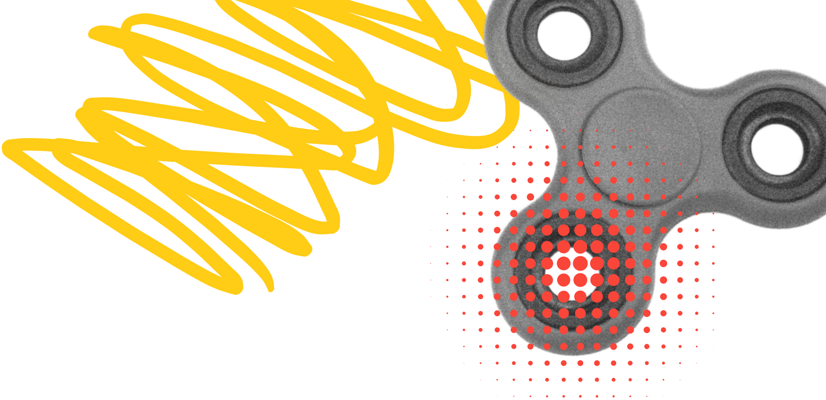
What is Modernist Studio?

Your authors are the three people who head up Modernist Studio, part of Gorilla Logic. Modernist is a strategy, design and innovation consultancy helping its clients to create exceptional products, services, and teams; Gorilla Logic is a nearshore development powerhouse. Here's the lowdown on each author.

Chad Fisher

Chad was an original co-founder of Modernist Studio and is now the Chief Creative Officer at Gorilla Logic. Previously the lead creative director at Blackboard, the largest educational software company in the world, Chad guided a team responsible for developing an entirely new design language system and for rolling that system out to all of Blackboard's products. Prior to that, he was a visual design lead at frog design; his work there focused on visual design solutions in mixed disciplines, including websites, mobile applications, marketing collateral, and branding vision. His clients have included Bank of America, Intuit, Atlassian, and other large Fortune 100 companies.

Chad creates visual solutions that bring ideas to life. He drives brand continuity across diverse products and services, and brings aesthetic and emotional magic to even the most utilitarian software. The dogs in the office like him the most, probably because he's often eating candy.



Matt Franks

Matt was also a co-founder of Modernist Studio and is the Vice President of Design at Gorilla Logic. He was previously a Product Owner and Creative Director at Blackboard, where he was responsible for leading interaction design, system design, and product road-maps for all of Blackboard's products. Prior to that, he was an interaction designer at both frog design and Target, where his creative emphasis was on solving large-scale, complex challenges for enterprise clients.

Over the course of his career, Matt has released a variety of digital and physical products and services into the market for startups and Fortune 100 companies. He holds a number of patents and awards and is an instructor at Austin Center for Design. A matcha tea elitist, he can focus on two Zoom meetings at once (shh, don't tell our clients!) and holds an honorary doctorate.

Jon Kolko

Jon is the Head of Studio at Gorilla Logic's Austin office and was also a co-founder of Modernist Studio. Previously the Vice President of Design at Blackboard, he joined the company with the acquisition of MyEdu, a startup focused on helping students succeed in college and get jobs. Jon has also held the positions of both Principal Designer and Associate Creative Director at frog design, Professor of Interaction and Industrial Design at the Savannah College of Art and Design, and Editor-in-Chief of Interactions magazine.

Jon is the author of six other books, including Creative Clarity and Well Designed. He's also the founder of the Austin Center for Design, a school that teaches practitioners to become interaction designers and social entrepreneurs. He learned to play the sitar so he can, like, totally connect with his inner self, dude.

modernist studio.

If you'd like to learn more about how the team at Modernist Studio can help you create transformational products and services, you can contact us via our website:
www.moderniststudio.com

Acknowledgments

We would like to thank all of the people that have helped us learn enough about storytelling to write this book. To our clients, thank you for giving us the opportunity to help you help your customers. Special thanks to Meriah Garrett—our first client!—for trusting us as we were getting this whole thing off the ground. Thank you to our team at Modernist, past and present, for helping us develop such a strong reputation for high-quality, dependable work (Ana, Andrea, Andrew, Catherine, Chrissy, Courtney, Danielle, Francisco, Greg, Jessica, Justin, Laura, Manny, Savannah, Scott, Swava, Tiffany, and everyone else who worked with us for a short or long time!) And thank you to Ginny Carter for her help in shaping our writing into such a crisp, easy, and valuable read.

Special thanks to Swava Hooks (and supporting team) for the fantastic book design.

And to our families, and particularly our wives Justina, Becca and Jess—thank you for your patience and support during the stress, anxiety and long nights; our company wouldn't exist without you.

Would you love to know what your customers really want and need, even if they don't yet understand it themselves? Do you dream of creating products that feel natural and right when people use them, that they recommend to their friends, and which—most importantly—sell really, really well?

This is the book that explains the key ingredient for doing this. It's called storytelling.

Discover how experiencing and telling your customers' stories will enable you to:

- Uncover your customers' conscious and unconscious desires
- Create a design strategy that gives them they want
- Bring your colleagues on board with your vision of the future
- Create products you can be proud of

The Authors

Chad Fisher, Matt Franks, and Jon Kolko head up Modernist Studio, a design strategy consultancy which uses storytelling as its guiding principle for designing products that people love. Modernist Studio is part of Gorilla Logic. Find out more about Modernist Studio at www.modernststudio.com and Gorilla Logic at www.gorillalogic.com.