

VITAL FINDINGS

# BRINGING RESEARCH TO



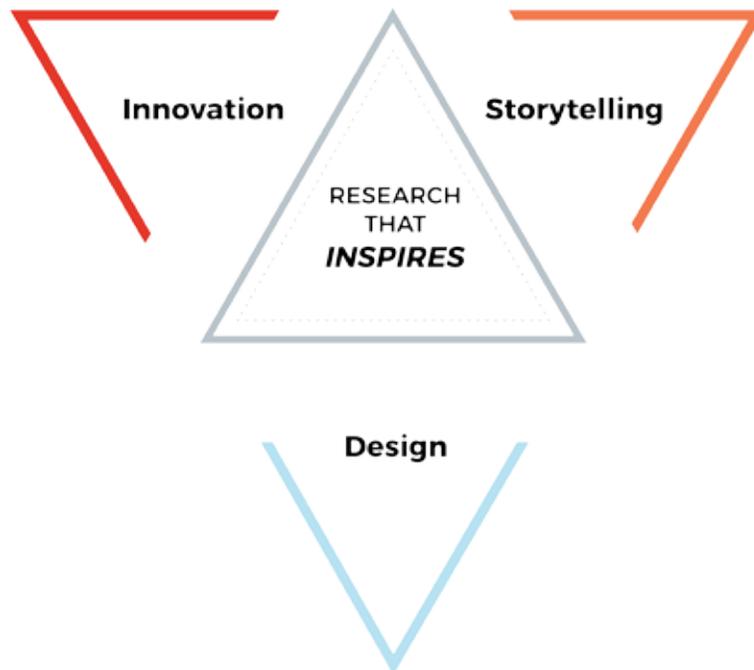
through Collaborative, Engaging,  
and Inspiring Workshops



## ABOUT

# VITAL FINDINGS

At **Vital Findings**, we believe that good, innovative market research should be judged by the actual impact it has on product development, marketing, and business strategy. Our mission is to elevate the market research profession beyond just delivering reports and PowerPoint bullets, using the tools of design, marketing science, and innovation consulting to allow researchers to actually enable business action. We combine state-of-the-art research methods with inspiring design to make research findings clear, concise, and actionable.



**Typical market research reports** and presentations often fail to connect with internal clients or inspire executives to take action. According to cognitive learning theory, this disconnect occurs because people learn through synthesis and evaluation – internalizing the insights by using them – not through merely reading reports. Sharing research findings via hands-on workshops is a solution to better engage clients and help them to internalize the research findings. This paper includes background and case studies on research workshops, and is meant to be paired with **D.I.Y. Insights Workshop Cards**, also available in the document.






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**Based on our experience, we have found three key points in the research process when workshops can be most effective:**

- ▶ At the very beginning of a study, when the business objectives are being translated into research objectives
  - ▶ After data collection, as a springboard for framing the analysis
  - ▶ After the report is finished, as a means to better evangelize the findings
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# WORKSHOPS:

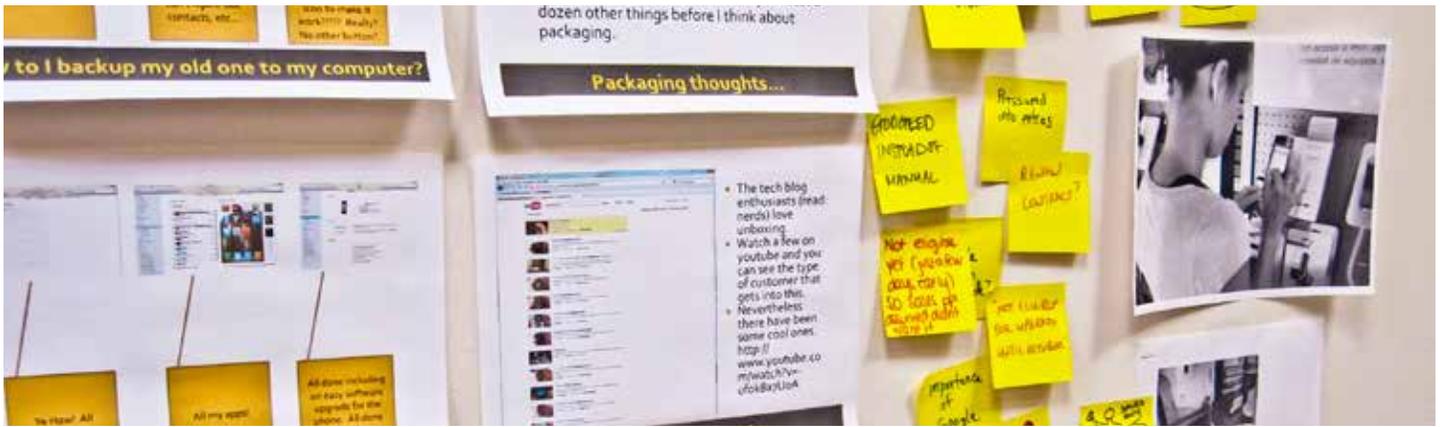
## THE SOLUTION TO TRANSFORMING INSIGHTS INTO ACTION

One of the biggest challenges for client-side market researchers is to utilize findings from research studies to command the attention of their internal clients and inspire company-wide action. Considerable academic research into the basic fundamentals of learning has revealed that ‘remembering and understanding’—the cognitive learning principle upon which PowerPoint reports are based — provides the lowest and shallowest level of comprehension.

Conversely ‘synthesis and evaluation’ (what typical report decks do not elicit from readers) assures the highest and deepest learning and comprehension.

One effective solution to incorporating ‘synthesis and evaluation’ into research findings is to engage internal clients with in-person workshops. These workshops are built upon tried-and-true brainstorming and creative techniques taught at the nation’s top design schools, including IIT’s Institute of Design and Stanford’s d.school, as well as major design consulting firms like IDEO.

Transforming the research presentation from the typical lean-back experience of watching and listening into a lean-forward experience of discussing and doing helps the audience to better internalize the information and, ultimately, to act on it.



## WORKSHOPS BEFORE RESEARCH BEGINS: IMMERSION

Conducting a workshop between the supplier teams and the client teams at the beginning of a project can help to gather input and gain buy-in from all major stakeholders in the research. Such pre-study work sessions can also help to determine the direction and content of the project before any time or money has been spent.

In an immersion, the goal is to thoroughly translate a project's business objectives into the supplier's methodology and instrumentation by having the supplier team members walk as closely as possible in the consumer's own shoes.

In a typical immersion, research team members each perform a topical assignment from the consumer's perspective. Some examples include: buying a DVD in-store for a project about the disc purchase process,

signing up for a free trial subscription to Spotify for a study on digital music, or attending a local Twilight convention for a project on Twilight franchise fans. Each supplier team member should document the assignment using photographs, screenshots, or a written journal and then present their experiences to each other in a workshop. At the workshop, participants discuss positives, negatives, pain points, and opportunities uncovered by the immersion and end with a terrific starting point for a quantitative research questionnaire or qualitative research discussion guide.

**A PowerPoint deck highlighting the team's immersion experiences can be submitted as an extra value-add deliverable for clients to help share initial insights and present the resulting questionnaire or discussion guide outline.**



## CASE STUDY

**An example of a pre-study workshop involves an immersion into the world of cell phones:**

In order to prepare for a project surrounding the cell phone purchase process, six members of the Vital Findings research team each went shopping for a new cell phone. Each person adopted the mindset of a regular consumer and engaged in the process exactly as they would have normally, whether that included conducting prior internet research, reading handset reviews, talking to salespeople, reading in-store signage, or other forms of preparation, but all actually purchased their new phones at a physical store rather than online in order to witness the sales process first-hand.

The goal of this immersion process was to understand from the consumer's perspective any pain points and opportunities in the typical cell phone buying experience, findings that were much discussed in the follow-up team workshop where each member shared his or her purchase experience. What the team ultimately found was that this was a much more complicated purchase process than initially thought, particularly because wireless contracts prevent customers from buying a new phone whenever and from whomever they want.

Because of this immersion process, the Vital Findings team was able to design the final study questionnaire to follow the path that an actual consumer would take when they purchased a cell phone and to include questions about steps in the process that they were not even aware of beforehand.





## WORKSHOPS BETWEEN RESEARCH PHASES: CO-CREATION WORKSHOPS

Workshops conducted between stages of the research process can help the research team to summarize and synthesize mounting discoveries and apply them to the next phase of the project. This is especially helpful on a project that follows exploratory qualitative research with a quantitative survey. A post-qual, pre-quant workshop allows the project team to leverage insights gained in the qualitative phase into the design of the quantitative study.

Participants can present their favorite qual respondents, pin illuminating respondent homework or photographs to the wall, and create lists or mind maps of key themes to stimulate further discussion and aid in analysis. The end result is a list of potential attributes for survey design, a set of hypotheses, and a rough analytical framework that can be carried into the quant phase of the project as well as a document summarizing the most important qualitative insights while the research is still

fresh.

Another example of a workshop technique designed to bridge research phases is a Co-Creation Workshop. Co-creation is a term used to describe techniques for involving consumers as active participants in the analysis and synthesis of research data.

Used in traditional market research, a co-creation session could be used after quantitative research has unearthed potential product opportunities that the client design team needs to understand more literally. For example, if quantitative research reveals that consumers want packaging to be more informative, co-creation sessions with consumers could reveal deeper insights about what informative means with regard to packaging in the category, and provide an opportunity for marketers, researchers, and consumers to bring the concept of informative packaging to life by creating rough mock-ups.

## CASE STUDY

A client had just finished a refresh for a tablet segmentation that had been used for years, and they discovered a brand new high-opportunity segment of working mothers. The client needed to understand these mothers' category needs and desired experiences in order to better develop products designed specifically with them in mind. After the segmentation had been completed, but before undertaking an expensive multi-city ethnography project, Vital Findings conducted a one-day workshop to help inform the topics for qual discussion. Six consumers who fit the new 'working mothers' segment were recruited to spend the day talking and working side-by-side with the client's product planning and design teams.

The day began with respondent introductions, and each consumer discussed how her tablet fit into her life, how she used it, any challenges she experienced, along with any opportunities

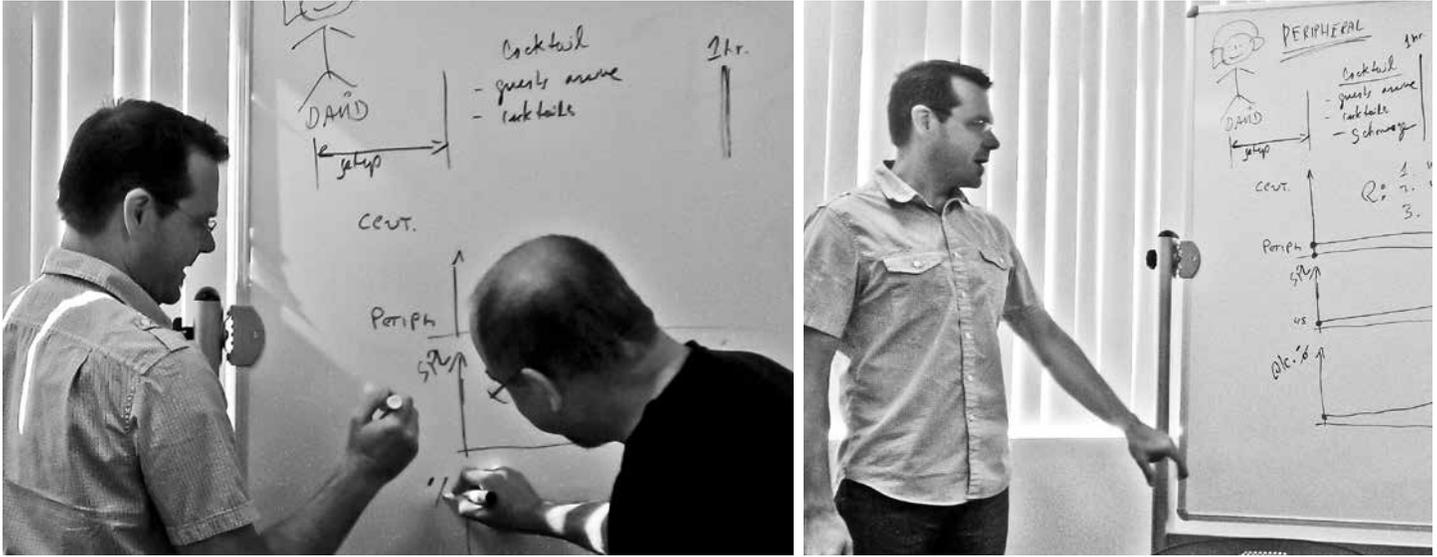
she noted for future functionality. Then, with that exercise in mind, the VF team partnered each respondent with a designer or researcher and had each pair co-create an ideal tablet for the working mother. Different stations around the room allowed for the creation of different aspects of the device. Each pair made hand-held prototypes from foam core showing the preferred size and shape, drew what the screen should look like using pens and notecards, and made 'mood' collages showing what feelings and emotions they wanted the device to evoke.

At the end of the exercise, the pairs presented their creations and a member of the research team recorded common themes and attributes. Lastly, the respondents departed, and the research and design teams distilled those common themes into six key product opportunities to be explored further during the upcoming ethnographies.





## CASE STUDY



### A music headphone segmentation provides a good example of using a persona workshop in this way:

In this case, a client had just finished a quantitative segmentation, and had identified one target consumer they were particularly interested in based on their high share of spend in the category and influence on other consumers. The senior management team was pleased with this focus, but the product team was having a difficult time envisioning how the segmentation fit with their product roadmap. Luckily, the client had done exploratory ethnographies before the quantitative research, and reached back to that data to identify respondents who fit the characteristics of the new segment. Using photos, video, diaries and collages from the ethnographies, they created three personas, each representing the high-opportunity segment in different ways. The client then set up a persona workshop with the researchers, marketers, and product managers in the business unit.

The group was split into cross-functional teams, and each team was given one of the personas. Each team's first assignment was to come up with two scenarios for how their persona uses headphones, answering questions such as: Describe the occasions. Who's participating? What music are they listening

to? Where? What role is music playing in the occasion? Why are they using headphones? This first exercise helped the teams gain a nuanced appreciation for their persona.

Next, the teams were asked to layer products from the roadmap onto the persona and the scenarios they had created. They were asked questions like: Which of our roadmap products is going to be most interesting to your persona, and why? Write 2-3 bullet points that would be the most effective way to Pitch this product directly to your persona. What benefits will be motivating for him or her?

After each team had finished, they each presented their persona, scenarios, and product roadmap implications to the full group. While listening to other teams present, participants were asked to write down on post-its their key takeaways from the presentation. When all teams had finished presenting, participants layered their post-its on the persona posters, clustering them by theme. At the end of the workshop, the group discussed similarities and differences in how each team assigned products from the roadmap, and agreed on which assignments made the most sense.



# CONCLUSION AND CALL TO ACTION:

There is nothing more empowering in market research than seeing the results of your research acted upon. However, our main communication tool – the final report – rarely stimulates action. While reports will always be our main deliverable, more and more executives are judging our work based on the action it delivers – not the volume or length of our reports. Presentations help, but still do

not fall in the synthesis and evaluation cognitive mindset that experts view as key to learning. Workshops are already being widely used by design strategy firms, management consultants, and branding agencies, and can help market researchers vastly improve how actionable research deliverables ultimately become, and help all of our key stakeholders view research in a new and much more dynamic way.

## ADDITIONAL RESOURCES

This paper includes background and case studies on research workshops, and is meant to be paired with **D.I.Y. INSIGHTS WORKSHOP CARDS**, also available in the document.



**D.I.Y. Insights Workshop Cards**



### Other helpful resources

[Stanford d.school bootcamp](#)

[IDEO's Human-Centered Design Toolkit](#)

[McKinsey & Co. tips for brainstorming](#)

[Frog Design's Collective Action Toolkit](#)



# IMMERSION WORKSHOP

*“walking in the customer’s shoes”*

# IMMERSION WORKSHOP



Give team members a common consumer objective to accomplish (e.g., shop for a product, sign up for a service, etc.).



Ask team members to document their experience 'as a customer' with pictures, screenshots, notes, etc. and print the images.



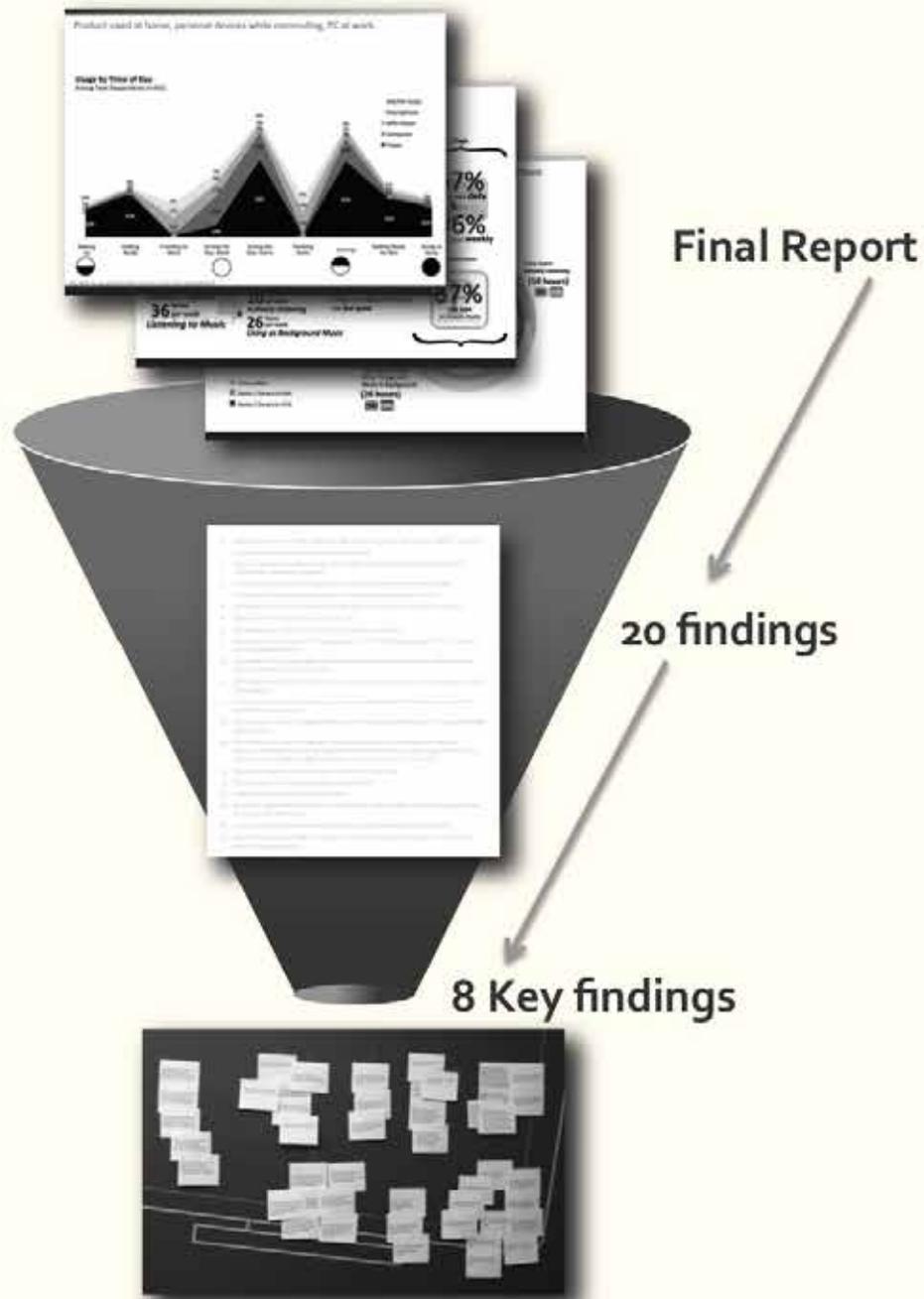
In a conference room, have everyone presents his/her experience, taping up images while speaking. As each person presents, ask others to write "key successes" (blue post-its) and "pain points" (red post-its).



After each presenter shares, ask team members add their post-its and explain their reasoning.



Encourage team members to discuss common themes and record them on a whiteboard. Organize and prioritize themes into research hypotheses, forming the framework for a questionnaire or discussion guide outline.



# PRIORITIZATION WORKSHOP

*“Distill, cluster, and prioritize insights”*

# PRIORITIZATION WORKSHOP



Copy findings from an existing research report into a Word document. Edit for overlap/clarity until you have a list of 20 or fewer one-line insights from the research.



Print each insight on a separate index card. Walk through the insight list as a group, and then hand each participant a stack of insight cards.



Have participants independently organize the cards according to importance to the business, from most to least important.



Have each person present his/her top 5 findings, voicing his/her reasoning while pinning each card to the board (grouping with similar cards that may already be on the board).



When finished, identify common themes and prioritize them as a group, discussing the business implications of each and assigning teams to take action.



*“Develop products with your target consumer”*

# **CO-CREATION WORKSHOP**

# CO-CREATION WORKSHOP



Recruit 5 target consumers and 5 internal researchers/marketers/product developers for a 4 hour workshop.



Have consumers create a collage beforehand and present it to the client team, explaining their needs and desired benefits within the category. Categorize these needs and benefits into themes.



Lay out “creation stations” with evocative, metaphor-rich materials (e.g., mood cards, product images from ancillary categories, drawing materials, foam core shapes, etc.).

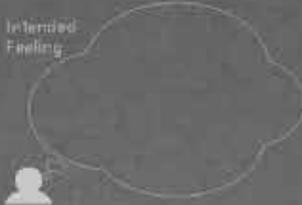


Assign consumer/client teams and give each team a theme to create a metaphorical “product” around. Teams will visit each creation station to add features and “look and feel” to their prototypes. When finished, each team presents their creation.



Dismiss consumers and have the internal team revisit each “product” and the original need/benefit themes, and discuss how to use the “product” insight to address consumer desires.

Idea Sketches

Event #:	Designer:	Date:
Idea Description	Intended Feeling	
Possible Formats	Support/Requirements	



*“Create the ideal product experience”*

# CONCEPT DEVELOPMENT WORKSHOP

## CONCEPT DEVELOPMENT WORKSHOP



Identify user experience champions within the organization and recruit them for a half-day workshop. Send the research report beforehand, requesting that each participant reply with their 5 key takeaways.



Begin the workshop with a short (20 min.) refresher of the research, followed by a discussion of key takeaways.



Split the group into teams of 3-4 people to quickly ideate and sketch new experience ideas (e.g. new apps, site tools, etc.). Provide product concept or UX storyboard templates. (see front)



Ask each group to create 20-40 ideas, presenting the top 10 to the full team. Provide post-its so participants can build on each others' ideas.



After everyone is finished, give each participant stickers to use for voting. Allocate time for everyone to review the concepts and vote for their favorites. Ask the teams to take the two top concepts and sketch out a use case scenario for each.



# PERSONA WORKSHOP

*"Personify your target segment or consumer"*



# PERSONA WORKSHOP



Create “day in the life” stories, either abstracted from or (ideally) personified by real consumers.



Ask participants to split into teams, each with a different “day in the life” story printed out. Provide the teams with photos, video, posters, or “experience stations” to get to know their consumer better.



Ask teams to review their story, underlining pain points and circling desired benefits. Teams should then condense the pain points/benefits into a list and prioritize them.



Using a concept form (a form with room for a headline/product name, a sketch, and a list of features), have the teams brainstorm ideas for addressing the key pain points.



Have each team present their consumer persona, pain points, and top ideas for solutions. Each concept form should be pinned to a board and clustered with similar ideas. At the end, team members will use stickers to vote for the top ideas to move to concept testing or refinement.

# VITAL FINDINGS

Research that *inspires*

[www.vitalfindings.com](http://www.vitalfindings.com)

[info@vitalfindings.com](mailto:info@vitalfindings.com)

310-279-5510