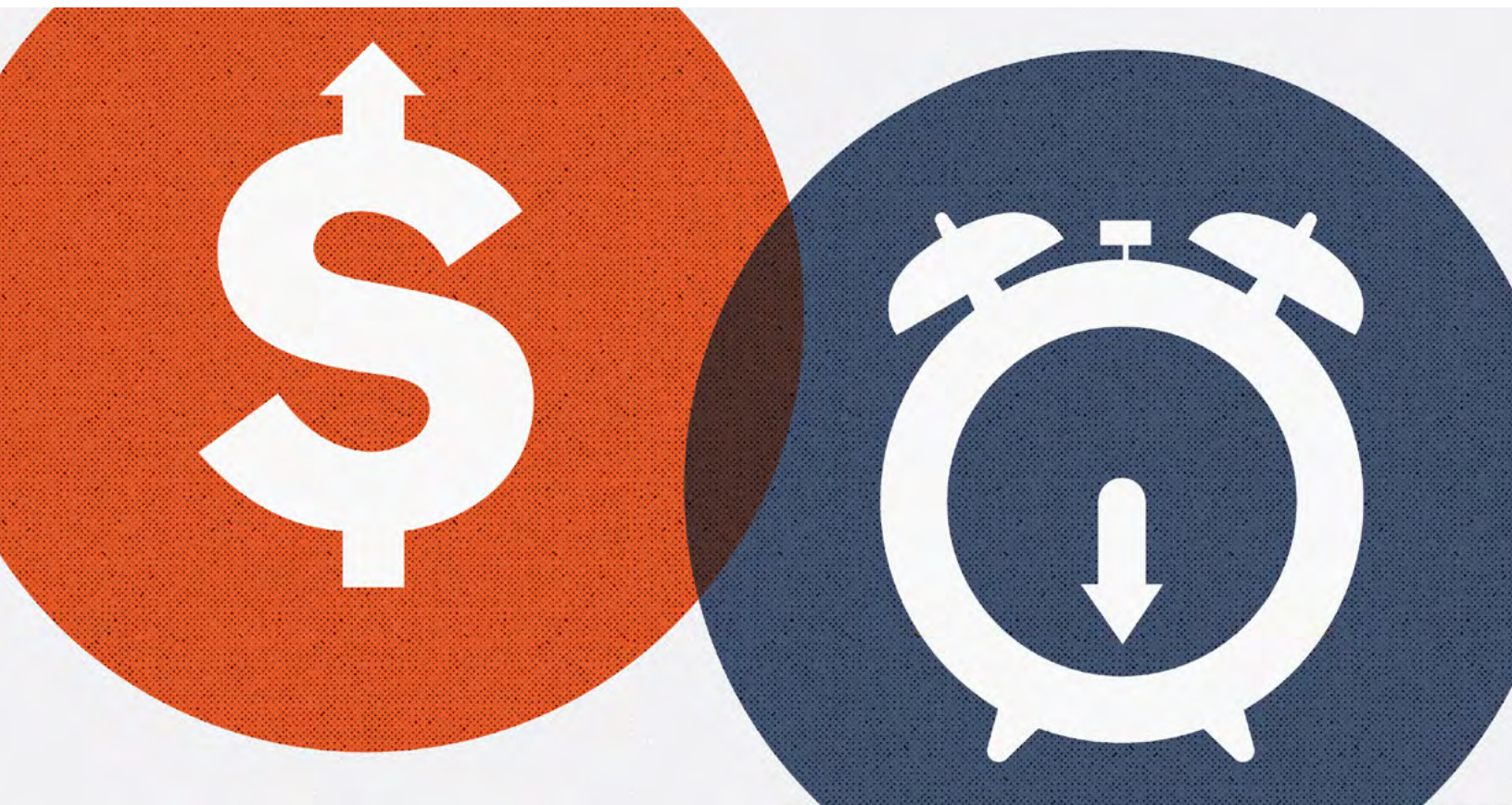**WHITE PAPER**

10 Paths to Empathy with Your End User (Without Blowing Your Schedule and Budget)

by **Monty Montague**

If you're a mid-sized manufacturing company, consumer research can be a budget-busting, schedule-stretching endeavor. Business leaders recognize that innovation depends on a deep understanding of the end-user, but the time and cost of research often stymies the process. Companies like Rubbermaid and GE spend hundreds of thousands of dollars to find the right end users and uncover the most pertinent insights. In fact, $6.7 billion is spent on market research in the U.S. every year.* So how can small to medium-size companies gain the end-user intel needed for innovation without blowing the budget and the schedule? New methods have emerged that shorten timelines, reduce costs, and penetrate deeper into consumer thinking and behavior. Here are 10 ideas for faster, cheaper insight gathering.Interact With Customers

Video speeds up the insight gathering process. It captures fleeting moments of user behavior so a larger team can analyze and uncover insights. It becomes the content for engaging research reports about consumer behavior and emotion that you can present to your larger team. Your development team will absorb and act on this more quickly than they will a dry, written report.

Interact With Customers

1. Hold User Sessions

Recruit skilled users and enthusiasts of products in your category for sessions with your design and engineering team. These cost-effective sessions are part focus group, part observational research, part brainstorming, and mockup making. Skilled users love to show off the tricks they've learned to overcome design flaws (a signal for innovation). Enthusiasts are eager to discuss the role their tools play in their lifestyle and aspirations. Guided by your design team, these users can generate good ideas using materials like cartooning, paper mockups, and storyboards. If you have a 3D printer, your design team can print the ideas during the session for immediate feedback.

2. Shadow Skilled Users

Recruit a small number of skilled users who will allow your design and engineering team to shadow them through a day in their life, focusing on their relationship with your category. Observe with an open mind; capture the day with videotape or photographs. Then meet with them in a session to discuss what you've seen and to share insights.

3. Video Everything (or have the end user do it for you!)

Video speeds up the insight gathering process. It captures fleeting moments of user behavior so a larger team can analyze and uncover insights. It becomes the content for engaging research reports about consumer behavior and emotion that you can present to your larger team. Your development team will absorb and act on this more quickly than they will a dry, written report. And with tools like iMovie and cheap video cameras, almost anyone can do a quality job at a very low cost.

Don't have a team to shoot video? Recruit users to shoot their own photos and video of their experiences with your product category. Most will have a phone or tablet to shoot with, but if not, send them one to keep as an incentive to work for you. Have them keep written diaries of their activities and emotions interacting with your product category.

Employ Online Resources

4. Use Online Focus Groups and Bulletin Boards

One big cost of research is travel for your team. Web-based focus groups from around the world are an ideal alternative to travel. Focus group software allows consumers to communicate from their location while seeing the moderator, shared images, and each other on screen. Client viewers can watch on their own computers and interact with the moderator via electronic messaging.

In online bulletin boards consumers are recruited to post information on web-based surveys over several days. They receive questions at intervals throughout the time frame and provide written responses—returning to the "bulletin board" multiple times to post new thoughts over the designated time period. Consumers can post photographs or videos to help explain their answers. The research moderator can also probe with follow-up questions. This approach yields a large quantity of feedback for minimal cost.

5. Tap Into Social Networks

Social networks such as LinkedIn, Facebook, and Twitter are a quick way to get answers about a brand or category by posting questions on a wall or in a user group. It's a good way to identify usage patterns, activities, and opinions. Respondents are not screened, but the interactive nature of these networks elicits authentic responses that group members are sharing with each other as well as the researcher. The ensuing "conversation" can be richer and more genuine than a straight question-answer approach.

Larger surveys can also use social media by recruiting people to click on links to a survey. While this saves time and money over assembling a panel, the respondents may not reflect your consumer. Therefore, this approach requires a good understanding of the category and good judgment as to how the information will be used. Researchers can target the audience they want and obtain quantitative data to be statistically analyzed.

6. Try Crowdfunding to Gauge Market Viability and Make Adjustments

Most of the techniques we've described are for "discovery research"—the collection of insights that lead to new ideas. But if you already have the idea and want to test its market viability, crowdfunding sites like Kickstarter and Indiegogo might be worth a try.

For little or nothing you can post your product concept on these sites and request pledges for development funding. The results can foretell broad market success or failure. Once posted on the site you'll need to invest time in social media marketing so consumers will find it. Also the supporters you gain through the campaign will provide valuable ideas for enhancement to your design.

Recruiting End Users, Building a Research Team, and Telling a Story

7. Use Multipurpose Recruiting

Recruiting consumers can be expensive and time-consuming. You'll get better value from each recruit by using the same group of consumers for more than one research event. Typical research programs recruit one group for focus groups, another for quantitative survey, and another for or in-situation ethnography. Instead, recruit one well-screened group of end users for all three. For example, hold your focus groups to learn what attributes to explore, then conduct in-situation research by observing the same folks using your products and your competitor's, then invite a small set from the group for participatory design sessions where they express their ideas and dreams in the form of cartoons and mockups.

8. Assemble a User Panel for Ongoing Research

A user panel of 10 to 50 frequent users provides a source of ongoing consumer insights and answers to spur-of-the-moment questions. Some companies shy away from building panels due to expensive consumer databases. Other times panels are started but not maintained. To maintain a panel, you must touch base with each member at least twice per year, rotate members at least once per year, and plan to pay a small incentive each year (cash and/or product). Use these techniques to recruit inexpensive panels:

Ask Your Distributors. If you sell through distribution, ask them to suggest panel members. Many consumers are eager to share their opinions and ideas. If distributors prefer customer confidentiality, let them be the go-between for panel member input.

Friends & Family Networks. This is simple and cheap. Seek participants from your personal network and employees' networks, set ground rules (including NDAs), then cast out research questions as needed. In our business we use this method with clients making consumer products like pet toys and personal appliances.

Professional Clubs. Clubs abound for everything from woodworking to knitting. Joining these clubs or becoming a sponsor can provide access to a large, targeted database of end users within your service or product category.

Enthusiast Websites / Publications. We recently worked with a parenting magazine to build a panel of car seat users. Like clubs, there's a website and magazine for every interest. Building relationships with publishers of these media gives you access to end users.

Warranty Cards and Corporate Websites. When consumers provide contact information on warranty cards or websites, follow up to recruit them for your panel.

9. Integrate the Design Team Into the Research

To save time and money ask your design team to participate in research along with professional researchers. The design team will develop an experiential relationship with the research findings and will grasp research reports more rapidly. This firsthand understanding of the user leads to better solutions, faster, and with fewer costly errors, creating remarkable products that resonate with consumers.

10. Tell a Story to Share Your Findings

When field research is done and analyzed, resist presenting it in boring research reports that bog down the development team in attempting to absorb and synthesize the data. Instead, present findings in entertaining ways to speed the process and ensure better understanding. Tell a compelling story about the end users, their lives, emotions, and behaviors. Use video and photography with captions identifying moments of insight. Define consumer groups as personas that emphasize shared values and behaviors. An engaging presentation will accelerate the innovation cycle and intensify the connection between your team and the consumer. ■

*Source: Council of American Survey Research Organizations (CASRO)

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MEET MONTY

As co-founder of BOLTGROUP, Monty Montague has worked with hundreds of clients in wide-ranging industries, including Fortune 500s like GE Lighting and Herman Miller. His name is listed on over 30 patents, and he has received the highest international design awards, including four Gold IDEA Awards, ID, iF, and MDEA Gold Awards.