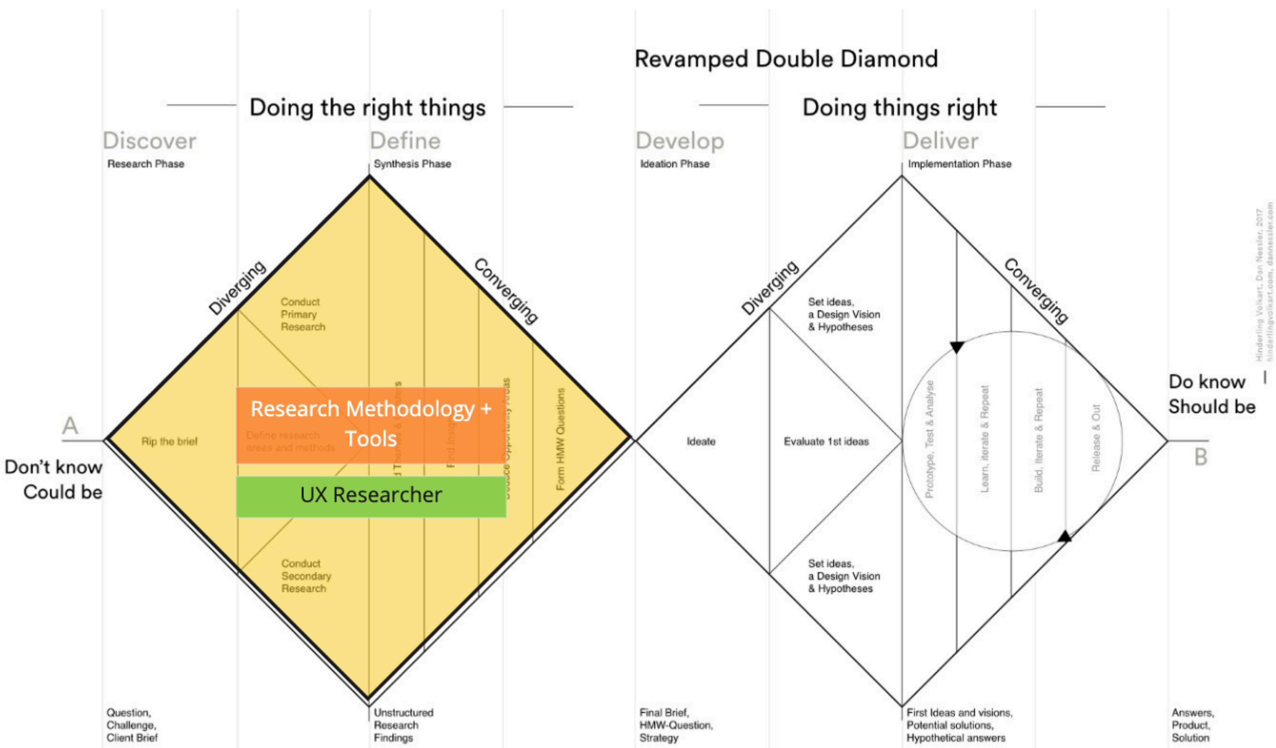
Research Methodology

> ⚠️ Please make sure you understand the Double Diamond methodology explained [here](#) before getting into the research methodology.

At this point, we would know the user has a need. Let's take as an example that the project we are working on is: Create a dashboard to allow the user to troubleshoot.

What we will not know already is, for example, what data the user would like to display, what format of report they need, and many other things. This is why we will need to research on the topic.

This first phase of **Discovery of the project** will be the first thing the team has to work in. No other steps of the process should be started before finishing this one. There has to be sprint time planed for this.



We would focus on the first part of the double diamond framework

1. Discovery

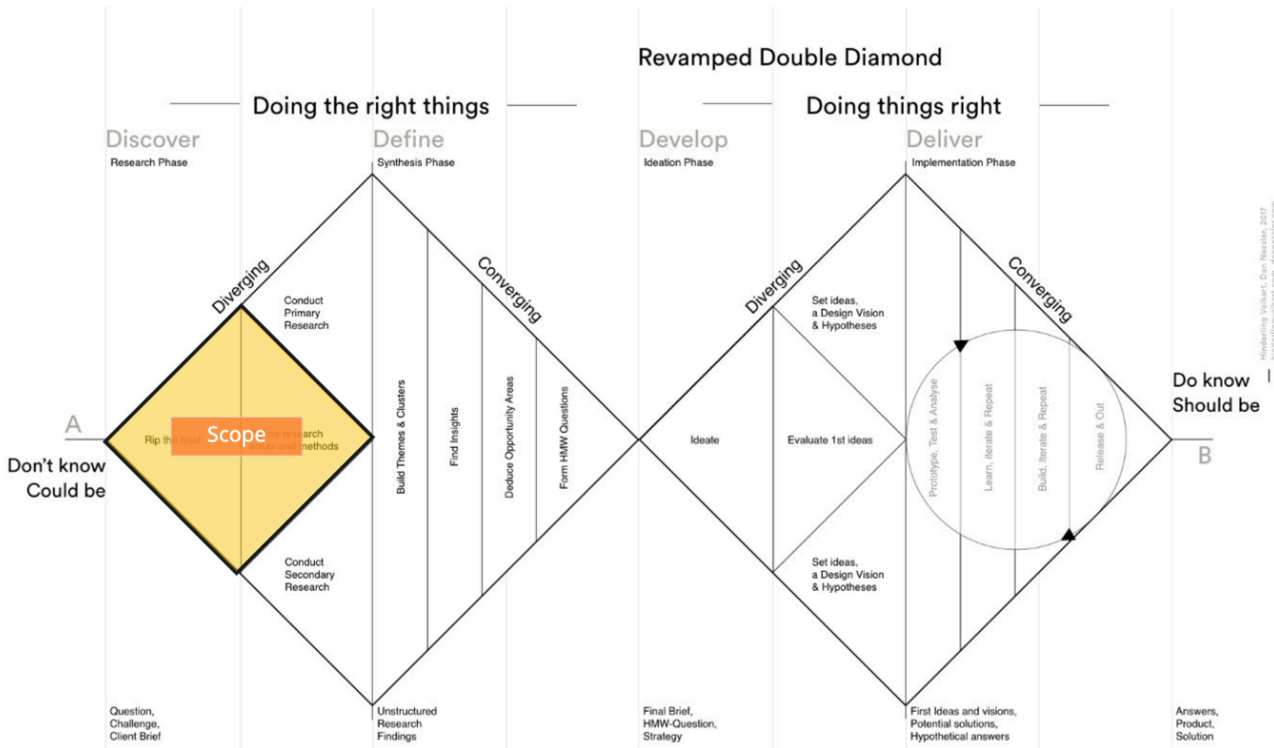
a. Scope:

The discovery scope can include UX and Tech resources, or just one of these. It should include as many stakeholders and follow a specific path. This path has been created specifically for ARGO and must be followed for each project.

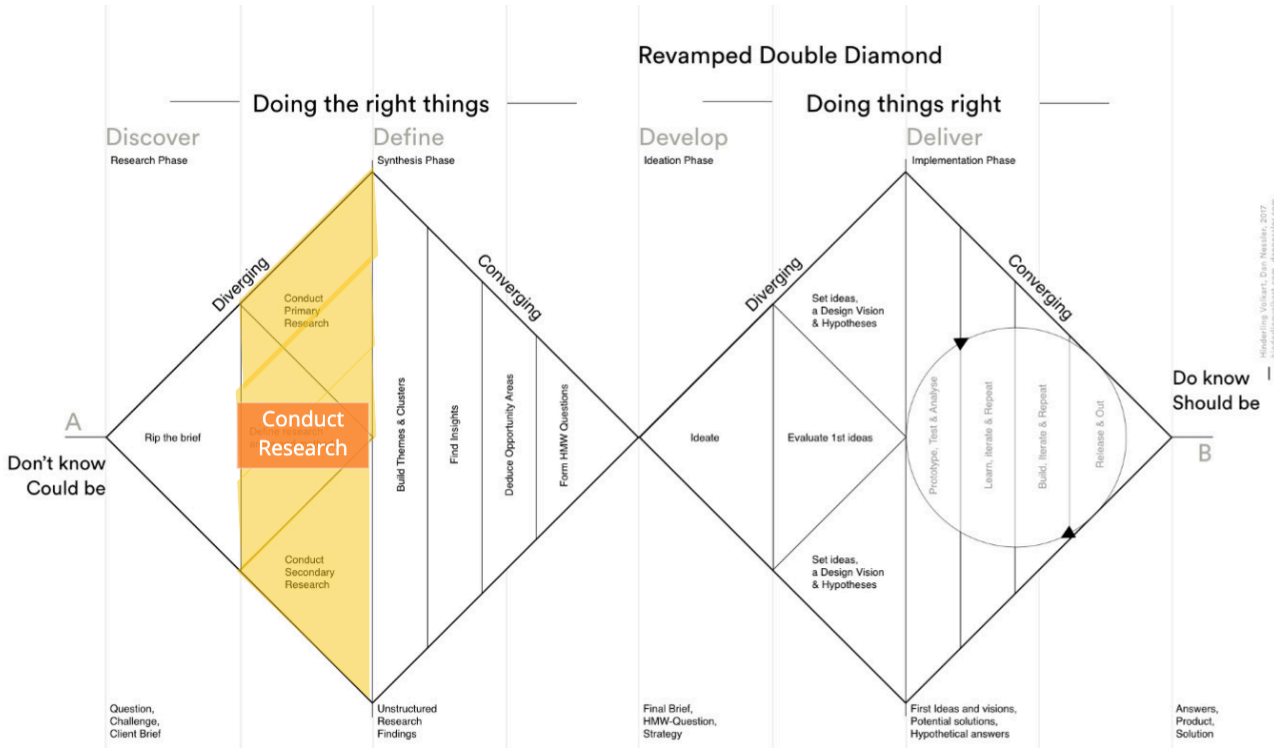
To define what should be the research that best suites your project discovery, use the framework of: [The customer question board](). Find an example [here]().

Based on the result your should be able to decide what research you would need to conduct.

We would be following the first part of the Discovery phase from the double Diamond.



Next step would be to **conduct the research**:



Here are some guidelines on how to be able to conduct different methods of research.

LINK Legacy Platforms

a. Legacy Platforms analysis.

Legacy Platforms Analysis. Research Methodology

b. Marketing Platform analysis

Marketing Platform Analysis. Research Methodology

Qualitative Feedback

a. Sales and Support interviews: Many people at LINK (employees) have a lot of experience in the market or in LINK, so it is necessary to get their knowledge into the project.

- You would need at least 5 inputs, but it can vary depending on your needs.

b. Customer Interviews

- Customer list.
- How? Workshops: conducting workshops can be very helpful to get information from the customers all at once. It consists on getting together some customers, do an exercise together that would bring answers UX is

- List of contacts of interest can be found in LINKnet
    - Northern Europe customer care, sales and product
    - Global Sales
    - Group Product Experts
- How? Workshops: conducting workshops can be very helpful to get information from the employees all at once. It consists on getting together some employees, do an exercise together that would bring answers UX is searching of + ask correct questions so that we do not miss anything. Guide on how to do workshops here.

searching of + ask correct questions so that we do not miss anything. Guide on how to do workshops here: Interviews and Workshops guide. Research Methodology

- For customers it might be better to do individual interviews. The same steps for the workshops can be followed. You would need at least 5 customers, but it can vary depending on your needs.
  Make sure you have validation from the account managers of the client to contact clients. You might need them to send the invitations and be part of the meeting.

c. Customer feedback page

Customer Feedback Tool. Research Methodology

Software Best Practices

a. Direct Competitors

Competitors analysis. Research Methodology

b. Other software solutions

Softwares to admire. Work process to succeed. Methodology

Quantitative Feedback

a. Data analysis

Data Analytics. Research Methodology

b. Customer support tickets

Support tickets. Research Methodology

Project Limitations

a. Tech Team

- TBD

b. Research Deliverables:

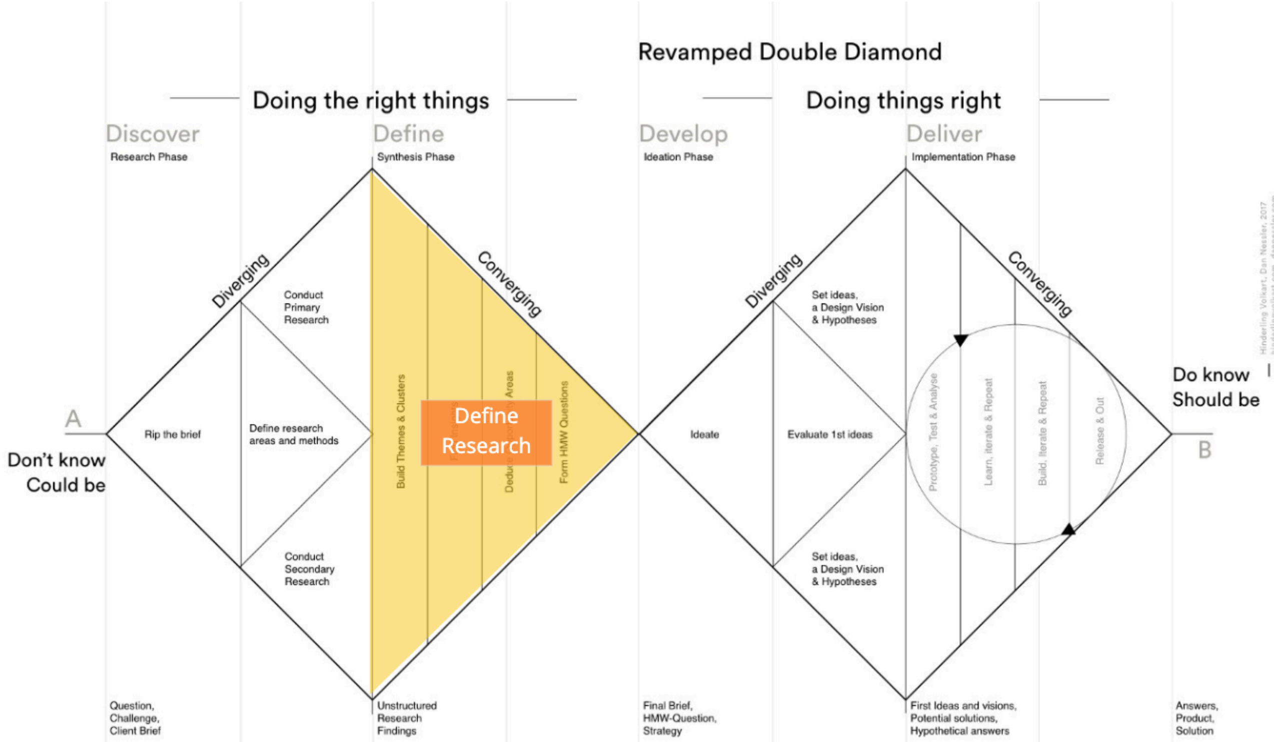
All the research areas would have their own dedicated way of finalizing it. This way everyone would be able to understand and read more details in each are if needed.

1. **Legacy Platforms analysis.** Legacy and Marketing Platform Analysis.xlsx
    a. **Marketing Platform analysis.** Legacy and Marketing Platform Analysis.xlsx
    b. **Sales and Support Interviews**. Dovetail Methodology
    c. **Customer input.** Dovetail Methodology
    d. **Customer feedback page** TBD
    e. **Direct Competitors.** https://linkmobile.sharepoint.com/:x:/s/myLINK2.0Coolname/EevGjGzGAUFEmBKbc0O9l_IBPewexVrs3FU6W93UwwZs-A?e=Vfyvf8 Connect your OneDrive account
    f. **Other software solutions** https://linkmobile.sharepoint.com/:x:/s/myLINK2.0Coolname/EevGjGzGAUFEmBKbc0O9l_IBPewexVrs3FU6W93UwwZs-A?e=Vfyvf8 Connect your OneDrive account
    g. **Data analysis.** TBD
    h. **Customer support tickets** TBD
    i. **Tech Team** TBD

All these are part of the delivery of the research finding.

After the any team member has done its deliverables, it would be reviewed by at least two other team members before defining it as “Done”.

2. Define



Researcher, to define and converge it's research should set:

Problems During the discovery of the project we should be able to find the **problems** our customers have in regards to the project. These problems are key as they will determine the future solution. Not all problems can be addressed in the project scope, so they will need to be prioritized by the team.

Use the following Miro template to write customer problem statements: https://miro.com/app/dashboard/?tpTemplate=customer-problem-statement&isCustom=false&share_link_id=207132672973

> ✏️ An example of a customer problem statement can be:
>
> I'm a product owner on SMS communications. I'm trying to recreate my company's structure in the myLINK portal with several sub account levels, but I have to contact support to set it up for me, because there is no such functionality in the portal, which makes me feel restricted.

Assumptions. Write assumptions and try to validate them. Follow these steps:

- List all assumptions about the project/topic/issue and define the most important ones.
- List the key questions you think we need to answer to learn about these assumptions.

- List the people you think we need to talk to about these assumptions (internal, external, …)
- List the needs that you believe these people have in relation to our product/service/feature.

HMW – How might we…? Based on the problem statements we can create HMW questions. Let's take the problem statement above as an example. These are some examples for HMW questions that could be deduced:

- How might we enable customer support to create the company's structures faster?
- How might we enable customers to create their account structure on their own?
- How might we enable customers to easily hand the needed account structure over to customer support from inside of the portal?
- …

Let your team or stakeholders vote for the most important HMW questions. These are to be handed to the solution builder.

Success. Based on the problems, the team can set the **goals and how to measure** for the customer to achieve during the project. This goals will be the key to determine if the solution has been successful or not. They should be defined with specific KPIs.

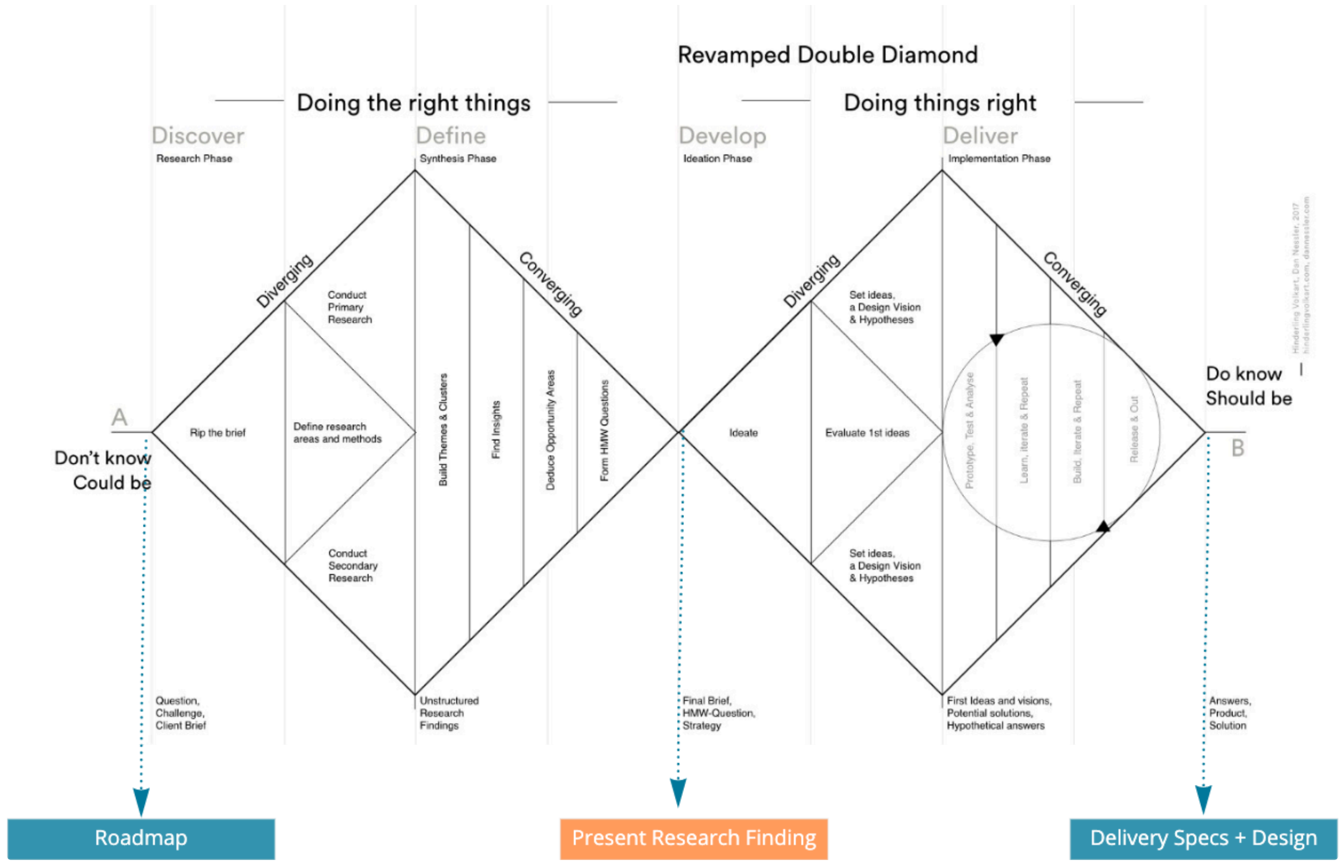
1-3 goals max and 2-3 KPIs per goal. KPIs have to be able to measure with the tools we have in place. If there is no tool to measure: raised the topic to Head of UX or Product Manager.

> ✏️ If we follow the example before, of the problem on data not been saved for more than 30 days, the goal can be: "After the development, customers can see data from at least 1 year old in all the reporting statistics." With a KPI it could look like this: After the development, at least 20% of our customers download at least once during the first month of the release a report of more than 30 days.

In this phase the researcher would be finalizing the first diamond, converging the ideas from the research into actual findings the solution builder can use.

3. Delivery Expected

> 📝 This is part of the delivery of the research finding.



Researcher would need to complete a final presentation.

🔚 After the any team member has done its deliverables, it would be reviewed by at least two other team members before defining it as “Done”.

Once the presentation is ready, the researcher would set a meeting with all team members and stakeholders (developer included) to share the findings. The meeting should be recorded and linked in the specs documentation.

The presentation should follow this template:

Template_End Research Report.pptx