

Inhabit the user's world

Over the past decade, the use of ethnographic research in business settings has grown dramatically. Evidence of this trend is abundant. *BusinessWeek* and *Fortune* have covered ethnography extensively, and a group of like-minded individuals founded EPIC, a conference devoted to the practice of ethnography in industry, several years ago. In many ways, ethnographic research has become so widespread that it is now table stakes for many businesses to keep up with consumer tastes.

Regardless of this increasing profile, far too much of the time, ethno-

graphic research gets “thrown over the wall” to designers before researchers first set the context needed for product development teams to generate relevant product and service ideas. Ethnographers are great at evaluating and characterizing human behavior, but their insights don't always

tell designers what to do about it. Social scientists and designers, trained in different thinking styles, need to cross the chasm between their disciplines in order to understand and support each other. Fortunately, bridges exist between these cultures that provide a common ground for both research insights and design concepts. Role play and guided imagery ideation provide powerful methods to bring research and design together to generate imaginative and compelling concepts.

Using role play and guided imagery for concept generation

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Major challenge

Though critical to the development of products and services, reams of data present a major challenge for design teams. Once the information has been sorted and analyzed, frameworks emerge that hopefully give coherence and meaning to the lives of the subjects being studied. But how does someone actually translate this knowledge into the production of compelling concepts?

Creating compelling products and services rests on the ability to truly connect with people by understanding what might be termed the “native’s point of view” (Geertz 1973). At the root of this understanding is a deep and rich grasp of people’s needs (Patnaik and Becker 1999). But truly understanding what people need requires a level of experiential insight and empathic sense for their lived experience.

This isn’t much of a challenge when designers create solutions for themselves. For instance, the people who create running shoes for Nike are passionate about sports performance and understand what it feels like to compete on different tracks in a variety of conditions. They have this kind of understanding because they themselves are runners. Nike intentionally hires athletes to design products, because they want to have people who have direct experience with the thing they are being asked to design. While this works well for Nike, few designers have it so good.

This is because it’s not always possible to have direct, firsthand experiential understanding of the area in which you work. Not every designer can be an athlete, doctor or field technician. This is where ethnography becomes extremely relevant to design. It is possible to

achieve deep empathy for people by observing their lives and defining their real needs. Maximizing the usefulness of such need-finding activities requires methods that engage human feeling and the imagination in a profound way.

Role play

Theatrical role play is one great way to reach this level of insight and empathy. This idea behind this technique is not wholly new. Anthropologist Victor Turner advocated “performing” ethnographies prior to entering the field so a nascent field worker could develop the empathy and understanding necessary to doing good field work with the people he or she was about to meet (Turner and Schechner 1985). Most design teams don’t have extant ethnographies they can role play, but they can re-enter the lives of their participants through



role play following the research phase to keep insights fresh and in context.

Doctors and patients

In one recent project, I used role play and scripted scenarios to understand the issues of doctors and patients in a clinical and diagnostic setting. I grounded the role play in data by creating a setting based on our field research in doctor's offices. We assigned people roles based on participant profiles for doctors and patients. Observed medical and clinical encounters provided the content for the role play, and scenarios were created based on the key participant stories from the field research.

Once these basic elements of setting, roles and scenarios were designed, we then had a script to begin our role-play exercise. With these in mind, we acted out the scenarios and a variety of interesting issues arose around space, interaction, doctor/patient rapport and the use of diagnostic tools.

For example, in playing the roles of patients and doctors, designers were able to intimately understand the challenges doctors face. Our role play showed that doctors often try to simultaneously use diagnostic equipment, maintain patient rapport and navigate in the tight confines of an examination room. Doing all of these activities made it hard for doctors to maintain patient rapport while also diagnosing and charting the patient's illness.

In essence, we gained a deeper understanding of the doctor's situation, and the needs their situation created. Most importantly, this activity helped the designers gain a deeper sense of empathy for doctors that translates directly into the passion to create relevant and meaningful products and services to solve doctor's needs.

Get into the character

In your own projects, try creating role-play scenarios and roles based

on the participants in your study. Act them out and try to get into the character of the people you are researching in order to feel the experience in your body. Are there parts to your scenarios that you can expand upon to understand the extremes of the field? What does it feel like to embody these extremes? What does it feel like to role-play the norms? How does it feel to be in these scenarios?

It's critical when planning a role-play exercise that you create a good stage and that the setup that has all of the right props, space requirements and other elements to make the role play most realistic (Boess, Saakes, Hummels 2007). The more you can key into memories of the research setting, the more real the experience will be for participants.

During and at the end of this process, debrief and articulate all of the images, ideas and thoughts that came to mind during the experience. This material is the rich fodder that can feed your concepting process and inspire the designers, who now have a deeper feel for the people they are trying to solve problems for. In essence, the more you can help designers and product developers feel the world of your participants, the more you will help them create rich and compelling concepts.

Deep content

Another powerful tool for embodying research data is guided imagery. Historically used in therapy and dream analysis, guided imagery, or creative visualization, provides a way to access deep psychological and cultural content that is often metaphorical in nature (Edgar 2004). Given its closeness to people's personal emotions and thoughts, this material provides an excellent complement to role play in concept generation.

One of the best ways to use guided imagery in concept development is in the earliest phases of ideation. To do this, transfer some

of your field data or key frameworks into scenarios. Write down a few scenarios that describe the world of the people you talked to based on your field data.

These scenarios can be as simple or complex as the task requires, but the key is to provide rich and descriptive representations of the worlds being designed for. Have a facilitator lead the team into the scenario. As the scenario is described, pay attention to how you feel. Visualize the sensations and emotions you feel. Make sure to paint, draw, collage and record all of the images and thoughts that come to mind. Create a palette of imagery and ideas from which to draw upon for further ideation and concept development.

Richer metaphors

At the end of the day, these methods for deep immersion in the worlds of other people exist to help create richer metaphors to feed designers' concepts. Metaphor is critical to creating good design, because it lies at the basis of how we communicate and understand concepts. As George Lakoff and Mark Johnson explain in their books *Metaphors We Live By* and *Philosophy in the Flesh*, we think, feel and conceptualize the world in fundamentally metaphoric ways. In addition, many of our metaphors are rooted in our bodies. Just think of some of our root metaphors: anger as "steam/heat," happiness as "lightness/buoyancy."

What this means for designers is that they are more likely to generate rich and meaningful concepts for people if they deeply feel and understand experiences from people's lives. The closer designers can get to actually living in the worlds of others, the more vivid and poignant their design metaphors will be. In essence, both role play and guided imagery provide direct links into the metaphorically-based world of the embodied imagination.

Not unbridgeable

The chasm between data-gathering and concept development is not an unbridgeable one. Ethnography can let you see and observe the world of other people, but it doesn't necessarily let you feel it in a rich and embodied manner. To truly create rich and meaningful concepts, you have to go deeper than observation and thought to the world of feeling and experience.

Both role play and guided imagery provide a means to embody research findings and stimulate deep resources of creativity for product designers. In this space of

creativity, rich metaphors and concepts can be generated which speak directly to people's visceral lives. Entering this space requires a flair for drama and the play of the imagination. Designers will tell you that to create rich and compelling concepts, you have to go to the dramatic edge of theatre and dreams, where the muses speak. But grounding those muses in reality is what gives compelling ideas real-world impact. | Q

Sources

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