Packet 1:

The BizLab Method

Sarah Bloomer, Experience Strategist
Ted Fuller, Business Technology & Analytics Lead
Nancy Mann, Experience Designer

Last update: January 2020

Table of Contents

Introduction

Welcome to WBUR's Public Radio BizLab!

BizLab enables public radio stations to test new avenues for revenue generation, distinct from their existing revenue streams and operations. As a member of our 2019 cohort, your team will work with us over the next year together with 5 other public radio stations. We're excited to be working with you.

Each station project will take place within a 6-month period. At the end of the year we'll gather at the BizLab Summit to share what we've learned with each other and a broader audience.

This document, *Packet 1: The BizLab Method*, outlines what we require from your team. Read through it to know what to expect over the next year. The BizLab team will work closely with you throughout the 6 months, coaching and collaborating with you every step of the way.

We've created two additional packets for the Discovery research phase of your BizLab project. These are instructions for how to apply specific methods for your use once you complete your BizLab project. In the meantime, instructions for the specific methods will be provided as needed.

Packets 2 & 3 are referenced in this document, however, to keep things simple, you'll receive them at the end of your project to enable you to continue applying the methods you learned, and perhaps try new methods used by other cohort stations.

> Packet 2: BizLab Research Methods and Tools
> Packet 3: BizLab Analysis Methods and Tools

The BizLab Team

Joan DiMicco, Executive Director
Joan leads the lab and will help guide your team from idea to a product. Her expertise on Lean Startup will inform new ways to try out your idea.

Sarah Bloomer, Experience Strategist
Sarah will coach you through research and analysis methods. Work with her to develop materials, ask questions and get comfortable with new approaches to getting to know your audience.

Ted Fuller, Business Technology & Analytics Lead
Ted is our data and analytics expert. Work with him to analyze any quantitative, digital analytics or survey data that enhances, complements and validates your research.

Lindsy Goldberg, Program Manager
Lindsy keeps us all on track, managing our grant reporting, logistics and coordination.

Nancy Mann, User Experience Research
Nancy will provide support in coaching and guiding you through Discovery Research and Experimentation.

Logistics

We require that you attend several regular meetings throughout your BizLab engagement and contribute to our grant reporting. Meetings include:

- Weekly team meetings (your team and the BizLab team)
- Monthly cohort meetings (all station teams and the BizLab team)
- Bi-monthly webinars (open to the public to attend)

Key information and dates

Slack channel: publicradiobizlab.slack.com

Public Radio Business Lab
WBUR
890 Commonwealth Avenue
Boston, MA 02215

Website & blog: http://publicradiobizlab.org/
Twitter: @WBURBizLab

Date for final Summit: December 10, 2019

The BizLab Method

BizLab is using a research model based upon existing innovation approaches: Design Thinking, Lean Startup and Jobs-to-be-Done. We've placed these within the Double Diamond, a time-honored approach used by designers.

- Our approach to Design Thinking maps to the Stanford d.school process, from empathy to test.
- Lean Startup is about being a *learning* organization: experiment, learn, test again.
- Jobs-to-be-Done is about understanding the *outcomes* your target audience seeks. Focus on behaviors, motivations and values over demographics or self-reporting.

There are three **core principles** behind the BizLab approach:

1. Get to know your audience.
2. Create targeted experiments small enough to allow multiple tests.
3. Allow yourself to be bold, fail fast, learn and iterate.

We define "design thinking" as continually exploring the problem space at every phase of your project.

The Double Diamond

Our double diamond represents the two phases of the BizLab Method: Discovery and Experimentation. Discovery research is typically 2 months long, while Experimentation is 4 months long.
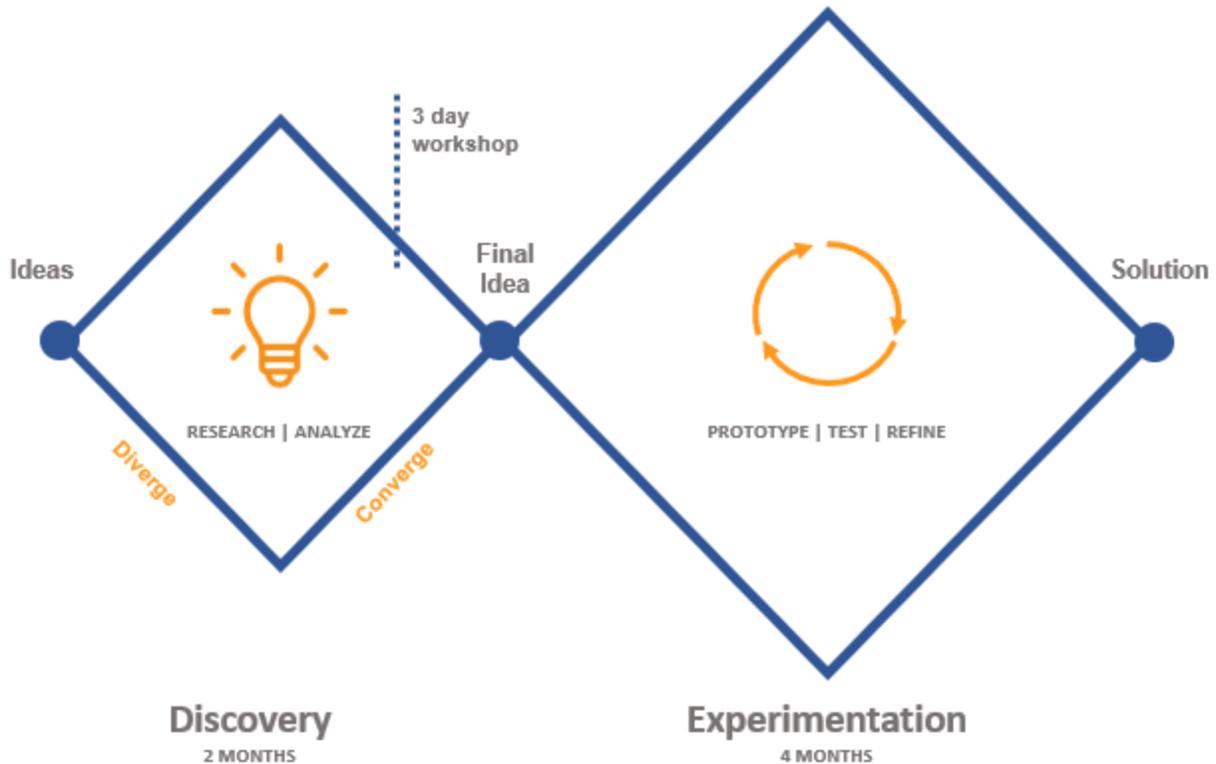
Each diamond represents the collection of a range of ideas and findings (diverge or flare) and then narrowing to a final outcome (converge or focus).

Each phase will be designed and tailored to each station based on your idea, audience and opportunities. All will be expected to implement multiple experiments in the Experimentation phase.

<table>
<tr><td>Useful Reading</td><td>Thoughtworks: Double Diamond</td></tr>
<tr><td></td><td>Stanford d.school process:
An Introduction to Design Thinking Process Guide</td></tr>
</table>

Eric Ries: The Lean Startup [book]; Lean Startup Circle [site]
Harvard Business Review: Why Lean Startup Changes Everything
Steve Blank: Evidence-based Entrepreneurship, The Lean Startup
                 Conference 2013 - 12/10/13
Eric Ries: The Startup Way

Choose the right methods to get to know your audience

One of the keys to your success during the Discovery phase will be using the right method and tool for the context and goal. Some of the techniques we're likely to recommend are below. Each of these will be worked to meet your specific audience, questions and needs.

Discovery research tools and methods [provided in Packet 2]
Purpose: getting to know your target audience

- Bullseye diagrams
- Café interviews / Guerilla research
- Cards
- Collages
- Desk research
- Diary studies
- Face-to-face interviews
- Intercept interviews at events
- Phone interviews
- Storytelling
- Workshops
- Recruit people to interview
- Affinity Diagramming

Analysis methods [provided in Packet 3]
Purpose: making sense of your qualitative research to identify the path forward

- Affinity diagramming
- Data analysis
- How Might We questions
- Research walls
- Empathy maps
- Empathy walls
- Experience narratives

Overview: Two Phases and a Workshop

Greater detail for each phase is provided after this overview.

Phase 1: Discovery

Your team has 2 months to complete your Discovery Research.

The goal of the Discovery phase is to collect and synthesize knowledge about the people you're targeting. This phase will prioritize qualitative research, that is, direct conversations with your target audience or business. We also use quantitative data. Quantitative data might include any survey data you've already collected or website analytics. You might also run a survey as part of your Discovery Research.

Through your research, you'll identify many ideas and opportunities (Diverge) which we'll explore in the workshop and narrow to the most promising ideas (Converge.)

Your research approach will be unique to your idea and audience.

1. In our project kick-off meeting, we'll use the BizLab Canvas (either Audience or Business or both) to gain a high-level understanding of your idea.
2. Identify **who** you want to talk to and why.
3. When thinking about who, also think about **how** you can get access to them. You can Observe, Engage or Immerse [d.school].
   - Ask yourself how you can get face to face with your target audience? These could be 1:1 interviews or group workshops or intercepts at an event.
   - For a new audience, perhaps intercept / "vox pops" interviews such at a farmer's market or station event.
   - When face to face interviews are impossible, hold phone interviews or meet online.
4. Collect existing data—surveys, discussions, feedback. You could hand this off to Ted Fuller (see Data Analysis.)
5. As the data is collected, BizLab will help you build frameworks to synthesize the data.
6. Desk research / knowledge harvest if it serves your goal to understand your audience or explore your idea. We'll identify potential desk research during weekly meetings.
7. Bring all that you learn to your 3-day workshop in Boston. BizLab will bring any additional data analysis that we've done.

The 3-day workshop in Boston

At the end of the 2-month Discovery Research phase, your team will join the BizLab team in Boston for a collaborative 3-day workshop. The workshop is designed to reviewed what you learned during the research phase. We will then refine your idea and develop a plan for the first few weeks of the Experimentation Phase.

The workshop agenda:

Day 1: Synthesis	Review all the findings together and identify insights to develop a shared understanding of what was learned. Create personas.

Day 2: Ideation	Take the insights and personas into a full day of idea development. Define the first few experiments that will be the first test of your idea.
Day 3: Planning & Communication	Set up our ongoing communication both with each other and within your station.

Your team will return to your station with a plan to implement your project immediately. Your weekly meetings may change to a different day, and our focus will shift from Discovery Research to Experimentation.

Phase 2: Experimentation

The first 2-3 experiments are designed at the 3-day workshop.

The goal of the Experimentation Phase is to run small, scrappy experiments designed to test a specific hypothesis related to your idea. Ideally, you'll run one experiment every 2 weeks, as you evolve your idea to a viable, final product.

Every two weeks your team will:

- Design an experiment.
- Set measures – how will you know if it's a success?
- Run the experiment.
- Assess outcomes – Success or Failure?
- Determine the next experiment based on what was learned.

We will set up a shared spreadsheet to capture the elements of the experiment, tracking both planning and results.

Together each station and BizLab will review the progress of your experiments during our weekly meetings and help you troubleshoot as you go.

Wrapping up your BizLab Project

At the end of your six months, no matter how much or little you have achieved, your BizLab project will come to an end. You'll receive training and coaching in how to develop a pitch to present to the station leadership, with your recommendation about whether to proceed or not.

Project Kick Off

At the beginning of your 6-month project, BizLab and your team will get started with a one-hour meeting via Zoom. During this meeting we'll introduce ourselves to each other, fill in your BizLab Canvas, schedule your weekly meetings and look at possible dates for your 3-day workshop in Boston.

The BizLab Canvas to get started

"Canvases" are templates or worksheets to help structure thinking (see Business Model Canvas or Value Prop Canvas). The BizLab Canvas is a visual worksheet with elements that underpin your project. We've created a Canvas for BizLab to help guide your research and capture findings about your target audience.

We'll complete the canvas at our project kick-off to get us all on the same page. Later, we'll review the goals outlined on the canvas at your 3-day workshop.

- You may create more than one Canvas depending on your idea or target audience.
- We will provide you with a Word document and complete the Canvas together.

wbur BizLab	**Experiment / Idea Description**			**Target Audience / Customer**	
	Station:			**Team:**	

Station + Idea *(fill out top row to guide the design of your research)*

Your Station's existing strategic goals	Your Goals in proposing this idea	Learning targets	Barriers to experiment success
Star (*) the goals your idea aligns to • Expand membership • Grow audience • Deepen engagement • Build relationships (B2B) • [specific to your station] **Your focus** *Check all that apply to your idea:* ☐ Enhances an existing revenue stream (e.g. increases fundraising, underwriting, etc.) ☐ Creates an entirely new revenue stream ☐ Digital ☐ Events ☐ Content driven – depends on a new content type or vertical ☐ Monetizes expertise and/or resources existing within the station ☐ Local / ~~National~~ / ~~Global~~	•	*What is not known about this idea?* *What assumptions do you need to test?*	

Audience *(fill this out with findings after research with audience)*

Values: Outcomes/Jobs to be Done *Example: why do you (audience member) donate?*	Emotional Jobs *E.g. When I give, I feel...*	Obstacles *E.g. What stops you from becoming a member?*	Interaction *How do you interact with us?*
What are the top audience 3-5 outcomes /values? Why will they do [experiment]? Method idea: Ask participant to do a card sort / ranking printed with the hypothetical values	*How do they want to feel about the outcome? How do they want to be perceived by others?* Method idea: Ask participant to describe emotions associated with items in the card sort. Match them up.	*What gets in the way of success? Is it contextual, economic, philosophical, takes too long, didn't know how etc.*	*How do they interact with [station]? To help us understand one aspect of behavior change if we want to change interaction.*

Public Radio BizLab – WBUR, 2019   BizLab Experiment Canvas ©

Station + Idea

Fill out top row to guide the design of your research.

Your Station's existing strategic goals

Select the goals your idea supports and, if necessary, add 1-2 which are specific to your station. Station strategic goals are high level and potentially target 1-5 years out. This help to position your idea in alignment with your station's goals.

Your focus

This list was derived from the themes drawn from potential projects. Click to check off all that are relevant to the specific idea covered by this canvas.

Your Goals in proposing this idea

List your top 3-5 goals behind the idea, to help us keep research focused and simple.

Learning Targets

Create 2-4 questions that describe what you specifically want to learn about your idea through the experiment.

> For example: Will our audience attend educational events delivered by local organizations? What price point will the [podcast] audience give for Text to Donate? Who is most likely to use Text to Donate?

Barriers to experiment success

What could get in the way of success, e.g. unable to find anyone to interview; chose the wrong methods for the experiment; slowed down by stakeholders.

Thinking about barriers ahead of time often helps identify additional questions to drive your research or mitigate the risk of failure.

Audience [use the appropriate Canvas for Audience or Business]

*Fill the bottom half out with findings **after** research with audience*

NOTE – a starter list of Values, Emotional "jobs," Obstacles and Interactions are in the Appendix of Packet 2: Research Methods & Tools.

Values: Outcomes/Jobs to be Done

What are the top audience 3-5 outcomes /values? Why will the target audience do [experiment]?

Method ideas:

- Interviews: Ask participant to do a card sort / ranking printed with the hypothetical values.
- In a workshop: have participants write down what they value about your station/podcast/site on sticky notes and rank them on a bullseye diagram.

Emotional "jobs"

How does the audience want to feel about the outcome? How do they want to be perceived by others?

Method idea:

> Interviews: Ask participant to describe their desired outcomes, and match emotions aligned with those outcomes in a card sort (see the appendix in Packet 2: Research Methods & Tools.)

Obstacles

Obstacles are the flip side of success. What gets in the way of success? Is it contextual, economic, philosophical, takes too long, didn't know how, etc? Review the list in the Appendix for ideas.

Interaction (audience)

Audience: Be specific about the touch-points customers use covered by your idea or potential experiments.

Success Metrics (business)

Business: Find out from the businesses you interview what success looks like to them if they engage with your station. Be sure to make it measurable so that you can report back to them.

Note at the end of the 2019 cohort:

The Canvas served us well as a kick-off activity for all 6 of our cohort stations. It allowed us to talk about the project in terms of the idea, how the idea aligned with the station goals and to capture high level understanding of potential barriers. The Canvas was essential to making a rapid start on the Discovery Research phase.

However, we did not complete the Audience portion of the Canvas for any of the projects. This was largely due to time and need. While we brought the canvas to the first few workshops, we found that the workshop itself served as enough to capture our understanding of the target audience.

Discovery Research

Plan your Discovery Research

The first step is to plan your Discovery Research. Work with Sarah to plan your research and apply the most effective tools. Work with Ted to help with data analysis and data collection.

Goal of Discovery Research

- Gain deep understanding of your audience.
- Synthesize the findings into insights.
- Use the insights to refine your ideas.

Your team has 2 months to complete your Discovery Research. This is not a lot of time given that you have committed 20% of your time (approximately 1 day a week) to your BizLab project.

The goal of the Discovery phase is to collect and synthesize knowledge about the people you have in mind for your idea, and to do so within the context of your idea.

This phase will prioritize qualitative research, that is, direct conversations with your target audience or business. We also use quantitative data. Quantitative data might include any survey data you've already collected or website analytics. You might also run a survey as part of your Discovery Research.

Design your Discovery Research Activities

Work with Sarah to design your research activities.

Identify your target audience

Make sure the people you interview are representative and provide as balanced a view as you can manage. Choose to reach a minimum of 7-10 people face to face / by phone, supplemented by a survey. Obviously more is better, but time is a limiting factor.

Demographics should span a range of:

- Gender
- Young and old
- Single and married
- Member and non-member
- Location

Consider if your goal is to target your existing member profile, or if you're looking for new types of members such as a younger demographic. If so, target people within a specific age range.

Note: It will be difficult in this study to seek to cover a full range of diversity such as race, ethnicity, socio-economics or sexual orientation. Unless this is critical to your idea, given our 2-month research timeframe, we cannot seek this level of diversity.

Identify the best method

Your primary requirement is to speak directly to your target audience. Face to face conversation enables a deeper, richer conversation. Choose a method or methods which will allow you to access a good sample of audience members.

Some opportunities include**:**

- An upcoming event, either held by your station or related to your idea.
- A planned set of phone calls or remote face to face calls using a tool such as Zoom.
- Walkthroughs of an existing digital asset such as a website.
- A structured focus group with a facilitated group conversation.
- A town activity such as a farmer's market or artisan's market.
- Arranged group meeting through a partner, e.g. your license holder or another non-profit etc.

Tips:

- Be clear about your research **goals** for each activity.
- Create an **agenda** for any workshops.
- Create a **discussion guide** for one-to-one interviews.
- Create and follow a **script** for any phone interviews.
- Use **props** to help you structure the conversation. These may also provide some early synthesis based on the way the information is collected. A good example is using Cards (see Pkt 2.)
- Think about how you'll **collect and analyze** the data.

Note:
Research methods and tools can be found in **Packet 2: BizLab Research Methods & Tools**

Recruit People to Interview

Once you decide how you're going to get in front of actual members or businesses, you need to find them and schedule time with them.

Even if you plan to talk to people at a scheduled event or activity, you must plan how to interact with them—whether to schedule ahead of time or intercept them in the moment.

1. Identify the way you want to interact with your target audience to address your learning goals.
2. Be sure to outline exactly the types of people you wish to speak to based on your targets. Develop a "screener" together with Sarah.
3. Consider how much research time you have—this will influence which method is selected.

Formal recruiting

There's a lot you can do without hiring an expensive recruiting service. Planning 1:1 interviews or a workshop means you need to recruit and schedule people, which can be difficult and time consuming.

- Work with your membership organization.
- Recruit via your website, Facebook page or Twitter account (if permitted by editorial.)
- Reach out to "family & friends," that is, people you know who meet the recruiting requirements.
- Offer a "thank you" gift, which could be as simple as stickers or a gift card.

Café studies

Café studies (also called guerilla research) became a popular way to reach the public by startups using the Lean Startup approach. If you are seeking new audience members, this might be a cheap and dirty way to find people within your target audience.

Intercept Interviews

Intercepts are similar to café studies. Consider using intercept interviews at an event that provides access to people already familiar with your station. Since interviews are short, a good script is essential. Create up to 5 questions that allow for a wide variety of answers. Avoid those that lead to a "yes/no" response. Include an aspect of *why* in the question or ask why as a follow-up during the interview.

Workshops / Focus Groups

Bringing a group together takes planning, and also an efficient approach that allows you to learn more, as participants interact with each other as well as with you. In the workshop, you'll use specific tools and methods to collect data in a way that help surface findings quickly.

Useful Reading	User Interviews: How to write screener surveys to capture the right participants.
	UX Mastery: How to write screeners for better UX research results.
	Rosenfeld Media: Portigal Consulting Sample Screener.
	[Note: this example is more complex that we will need, but shows what a full-blown screener looks like]
	BizLab: Packet 2: Research Methods and Tools
	BizLab: Packet 3: Analysis Methods and Tools

Hand over your Data!

We are here to help you find the nuggets in your raw quantitative data, whether it's from surveys or Google analytics from your website or app. Ted Fuller, BizLab's Business Technology & Analytics Lead, is here to provide support.

Analyze existing data

- Google Analytics – how to set up analytics for your website. Google Analytics can be a good source of user behavior, that is, data about your users when they visit your website. You can also use Google Analytics to learn about who is visiting your site.
- Email analytics – if you have a newsletter, look at engagement.
- Integrate other data with your data, e.g. population data with membership data.
- Give Ted access to your Analytics account. Even if your project encompasses only one web property, it may be valuable to review the analytics of your other sites or apps as context/foil for the one you're concerned with.
- Provide any survey data, Excel, .csv files (e.g. members survey, marketing data, demographics, etc.)

Collect new quantitative data

Design your survey study

- Set a clear goal, don't throw scattershot questions into a survey. This will make it difficult to analyze.
- Target a specific audience.
- Decide which platform to use such as Google Forms, Surveymonkey, Wufoo or Typeform.
- Make sure it works on both a desktop and a smartphone.
- Include demographic "slice & dice" data to enable analysis in addition to questions.
- Keep it short – no more than 10 minutes or 10 questions.
- Open ended questions are valuable but use no more than 2. Keep questions quantifiable – that is, respondents must make a specific choice. Save open ended questions for 1:1 interviews.

Decide how to reach respondents. Note: most stations cannot use their Facebook page or Twitter account to reach people (e.g. you seek non-members for a survey) due to the editorial/business firewall. Consider your member newsletter or, if you have an event, consider using mini-surveys with a QR code.[1]

Either way, work with Sarah & Ted!

Things to think about:

- What types of analytics tools and/or data-sets do you have available? Of these, which would you need the most help with analysis, and are you able to share it?
  e.g. Amazon affiliate revenue, Google Analytics data, podcast analytics, etc.
- Are there sources of data which you'd like to tap into?
  e.g. conducting a listener survey, implementing analytics tools, or constructing a database.

---

[1] See Packet 2: BizLab Research Methods & Tools

- What questions do you hope to answer through this analysis?
  e.g. Which pages or content are generating the most traffic or the most revenue? Are there any patterns to user behavior with a feature or time-based? What patterns are revealed by user feedback data? Where are users / listeners located? Do you need to gauge audience reaction to the addition or removal of a feature?
- Does your data contain sensitive financial information or personally identifiable information? If so, it's imperative that you are transparent with your participants in how you plan to use their data and protect their data.

We look forward to seeing what we can turn up to inform your experiments!

Useful Reading

Tom Hall: How to create effective user surveys
Chris Thelwell: How to quickly create a powerful survey

Google: Understanding User Behavior with Google Analytics
Monster Insights: How to Find Demographic and Interest Reports in Google Analytics [2019]

Packet 2: BizLab Research Methods & Tools, section on Mini-Surveys

Analyze your Research Findings

It's not enough to collect data. You need to make sense of it.

The Lean Startup method is fundamentally about validated learning. The Discovery Research phase is the first step in learning, and once you've collected data you need to transform them into insights with analysis. Analysis and synthesis enable you to surface opportunities for your experiments.

The Stanford d.school calls their Analysis phase "Define." Here's their description:

> "Define: Understanding the meaningful challenge at hand, and the user insights you can leverage, is fundamental to creating a successful solution."

BizLab will coach you through any early synthesis to find those user insights. For example, you'll create sticky notes after intercept interviews and sort them with your team. Or together we might create an affinity diagram or a journey map using an online tool such as Mural or Miro.

It's best not to "eyeball" your findings, because what stands out to you may be different than what stands out to others. Small treasures are often obscured by the obvious findings.

In other words, don't be satisfied with what you first learn—when you really dig into the findings, you discover new ideas and opportunities lying at the heart of your research. It's very likely that you'll find your assumptions challenged and your original idea will start to shift and change based on what you learn about your target audience.

As you analyze the audience feedback collected, ask yourselves:

- What are the patterns?
- What are the themes?
- What are the Jobs-to-be-Done?
- Where are pain points and/or delighters?
- *What are the opportunities that we didn't see before?*

Note:
Analysis Tools can be found in Packet 3: BizLab Analysis Methods & Tools.

Analysis will continue in your 3-day workshop with the BizLab team.

Useful Reading	Stanford d.school: Intro to Design Thinking Process
	Matt Cooper-Wright: Design Research: From Interview to Insight
	IDEO Design Kit: Create Insight Statements
	Clayton Christensen: Know Your Customers' "Jobs to be Done"
	Tony Ulwick: The 5 Tenets of Jobs-to-be-Done Theory
	Portigal Research/Tamara Christensen: Insight Inspired Innovation
Supporting BizLab Resources	Packet 2: BizLab Research Methods & Tools
	Packet 3: BizLab Analysis Methods & Tools

The 3-day workshop

At the end of the 2-month Discovery Research phase, your team will join the BizLab team in Boston for a collaborative 3-day workshop. By the end of the workshop you'll have refined your idea and have a plan for the first few weeks of the Experimentation Phase.

By the end of the Discovery Research phase you will have a pretty good sense of where your initial idea is headed. We encourage you to bring a third person to this meeting, one who is likely to work with you over the Experimentation phase.

Here's what we will cover during the 3-day workshop:

Day 1: Synthesis

Review all the findings together and identify insights to develop a shared understanding of what was learned.

Activity	Goal	Methods/Tools used
Review all qualitative and quantitative data collected	Get everyone on the same page. Identify themes. Station team and BizLab team all present what they've learned, and generate How Might We stickies.	How Might We questions Affinity diagramming
Surface key attributes	Capture values, behaviors. Station goals and strategic objectives.	Facilitation by the BizLab team
Develop Strawman Personas	Synthesize what we have learned about the audience by creating personas.	Empathy maps in pairs or threes

Day 2: Ideation

Take the insights and personas into a full day of idea development.

Activity	Goal	Methods/Tools used
Review Day 1	Recalibrate and review the insights and personas created on Day 1.	Walk the room
Generate ideas	Explore the full range of possible ways to implement the idea from the perspective of value to the end audience member.	Strategyzer Ad-lib Value Proposition Template
Create potential experiments	Capture potential MVPs that represent the best ideas; learn how to put together an experiment.	Strategyzer Test Card
Brainstorm potential products	Take what we've learned, target one of the personas and brainstorm a potential product or service.	Paper or whiteboard sketches

Activity	Goal	Methods/Tools used
Design experiments	Agree on the first 1-2 experiments and potential MVPs.	Whiteboards and/or sticky notes

Day 3: Planning & Communication

Set up our ongoing communication both with each other and within your station.

Activity	Goal	Methods/Tools used
Set up tracking sheet	Kick off the Experimentation Phase.	BizLab tracking Google sheet
Identify key station stakeholders	Discuss a high-level communications strategy to update station on project progress.	Whiteboard

Your team will return to your station with a plan to implement immediately. Your weekly meetings may change to a different day, and our focus will shift from Discovery Research to Experimentation.

Useful Reading

Stanford d.school: Use How Might We questions to create "actionable provocations". [PDF]

Strategyzer.com

Experimentation

Planning your experiments

At the end of your 3-day workshop with BizLab, you'll have a product or service idea together with a broad hypothesis to test. You'll have three "strawman" personas who represent your target audience plus a set of assumptions about your audience and how you expect them to engage with your product or service.

Now you are ready for the Experimentation Phase.

Experimentation focuses on learning. During the Experimentation Phase you will run small, scrappy experiments designed to test specific hypotheses related to your idea. Ideally, over the next 4 months, you'll run one experiment every 2 weeks, as you evolve your idea to a viable, final product.
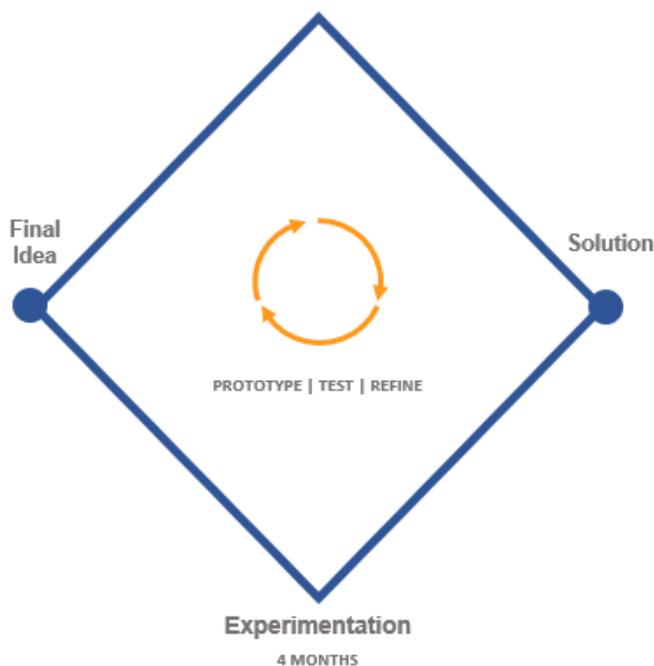
Goal of Experimentation

- Be bold, fail fast and learn.
- Iterate with each subsequent experiment.
- Continue to explore the problem space.

Final Idea

Solution

PROTOTYPE | TEST | REFINE

Experimentation

4 MONTHS

What is an experiment?

An experiment is any approach or activity which allows you to test your idea with your target audience. It should be small, minimal and, importantly, *not perfect*. After each experiment, another follows.

For example, to test the idea of a newsletter, you may be tempted to create an entire sample newsletter. That takes a long time. Instead, break down the problem into your first hypothesis: is the audience interested in a newsletter about this topic?

If you have an event coming up, you could first create a sign-up list at that event. Perhaps you are considering 3 different types of newsletters. You ask your target audience to sign up for the one that most interests them and proceed with the newsletter that has the highest number of sign-ups. If a small number of people sign up, you've learned that there isn't enough interest and try something else. You didn't waste time creating a whole newsletter only to learn then of the lack of interest.

From there each experiment should test one or two questions. With this approach, there is clarity about what is being tested and what the outcome relates to. Creating an entire newsletter would test too many elements at once: topic, tone, layout, timing etc.

In many cases, it's okay to let your audience know you are experimenting. This way you engage them in participating in the test. You might, for example, include a short survey or poll within your early newsletters to collect feedback.

In your BizLab project, you will run an experiment **every 2 weeks:**

- Design experiment
- Set measures
- Run experiment
- Assess outcomes

Creating an experiment

Our approach to experiments comes from the Lean Startup methodology. We adapted a test card designed by Strategyzer.

Strategyzer's Test Card has 4 steps which help to structure and design each experiment. Each experiment, or test, is designed to enable you to learn using measures to gauge success or failure.

The Test Card is one of the tools used during the 3-day workshop – each station learns how to write a hypothesis and create an experiment to test that hypothesis.

Tips:

- Keep each experiment simple–don't test more than one or two ideas so that the outcomes are clear
- Find the smallest test that can be done quickly and easily and has learning outcomes
- Test directly with your target audience
- Don't aim for perfection–be scrappy!

Test Card ⏻**Strategyzer**

Test Name — Deadline
Assigned to — Duration

STEP 1: HYPOTHESIS
We believe that

Critical: ▲ ▲ ▲

STEP 2: TEST
To verify that, we will

Test Cost: — Data Reliability:

STEP 3: METRIC
And measure

Time Required:

STEP 4: CRITERIA
We are right if

Copyright Strategyzer AG — The makers of Business Model Generation and Strategyzer

Tracking successes and failures

BizLab will create a Google sheet for tracking your experiments. Keeping a spreadsheet allows you to see how one experiment leads to the next, which succeed, and which fail, and to keep an eye on how your product or service is evolving.

Hypothesis	We believe that…	*Do502's engaged users want to know where the hot events are and would like to join an exclusive community of those in the know.*
Experiment	To verify that we will…	*Invite people to attend an event at a brewery, to launch Do502's "Breweries in Louisville" list. $5 to attend and get a free beer.*
Measures	And measure…	*Online RSVPs; event attendance; number of people who collect Do502 stickers; conversations with paying attendees.*
Outcomes	We are right if…	*at least 50 people attend and pay $5. [$250]*
	Success?	Success: 52 people attended
	What we learned	We could get higher numbers with more planning
	Next steps	Design another event with more planning time.

Each station's spreadsheet will include elements unique to your team, your idea and types of experiments. For example, what is measured when testing social media is different than what is measured for an event. Measures can be soft or hard.

Soft measures:
- All the swag at the event was taken.
- There was an uptick of customers in the store after the Instagram post.
- Increased donations (when you cannot say an increase is due exclusively to an experiment.)
- Positive feedback from your audience.

Hard measures:
- Number of people attended an event.
- Amount of money collected.
- Percentage of open rate, click through rate on a newsletter.
- Number of donations which come directly from your experiment.

We will use the spreadsheet at each weekly status meeting to discuss experiments in flight, planned experiments and often emerging ideas for new experiments. As you get into the swing of this phase, you'll find new ideas begin to flow as you engage with your audience and continue to learn.

Useful Reading	Strategyzer:	Designing Strong Experiments
	Alex Chuang:	The Ultimate Step-By-Step Guide to Validating Your Startup Idea, Part Two

The end of the experimentation phase

As the 4-month Experimentation Phase draws to a close, BizLab will work with you to create a pitch to your executive team. Each station will decide whether to recommend continuing with the idea or ending your experimentation phase.

Good luck!

Glossary

Most of the following methods and tools can be found in Packet 2: BizLab Research Methods & Tools and Packet 3: Analysis Methods & Tools.

Technique	Research	Analysis	Experiment	Definition
Workshops	✓		✓	Bring a group together to co-create or co-discover.
Cards	✓			Using cards to understand people's thinking. Card sorting, clustering, ranking, alignment etc.
Face to face interviews	✓			Pre-scheduled interviews with target audience, either in person or via live video meeting.
Café / Guerilla interviews	✓		✓	Finding audience members "in the wild" for interviews or rapid testing.
Intercept interviews	✓			Finding audience members at specific locations or events as they engage in an activity you are studying.
Bullseye diagrams	✓			Ranking framework.
Collages	✓			Tool for capturing emotion and experience of an existing activity.
Storytelling	✓		✓	Enable audience to tell their story using a targeted framework.
Survey	✓			Quantitative tool. Surveys collect data over time or capture specific input. Use to validate findings from interviews or as a source of indicators to direct qualitative research.
Diary studies	✓			Gaining insights on the day to day experiences of a target audience. Diary studies can be expensive–can we figure out some cheap and dirty approaches?
Data analysis		✓		Slicing and dicing data to find patterns.
Research walls		✓		A means of sharing ideas, sources of inspiration, and/or thoughts across teams.
Empathy maps		✓		Framework for capturing what a target audience member is thinking, feeling, seeing and doing when engaged in a specific activity. *Developed by XPlane.*
Empathy walls		✓		A wall covered in empathy maps.
Experience narratives		✓		Stories written from a persona point of view which describes a current or future experience. Sometimes these are created as storyboards.
Double diamond	✓	✓	✓	Framework for creative work and adapted by innovation approaches. Explore the problem before engaging in design. "Flare" before you "focus" to consider a broad range of alternatives. *[d.school terminology]*
Lean Startup	✓		✓	An approach to product development created by Steve Blank and Eric Ries. Startups are "learning organizations" in search of a business model.
Jobs to be Done (JTBD)	✓	✓		An innovation approach pioneered by Anthony Ulwick and Clayton Christensen. The idea is that people are outcome driven more than grouped by demographics.
Learning targets	✓		✓	A teaching tool appropriated to experimentation. Identify what your experiment is trying to learn.

Technique	Research	Analysis	Experiment	Definition
Personas		✓		An archetype of the target customer or member.
User Walkthroughs	✓		✓	Formal or informal walkthrough of a service or product by the target end customer.
Hypothesis	✓		✓	Taken from the scientific method, a hypothesis describes the thinking behind an idea.
Assumptions		✓	✓	Assumptions describe the ideas and assumptions behind a design or hypothesis, e.g. "We assume 70% of members are interested in intergalactic travel"
Success metrics	✓		✓	Success metrics are used in a hypothesis to describe how you'll know your experiment was successful. *Also see KPIs and OKRs (Key Performance Indicators, Objectives and Key Results)*
Design thinking	✓	✓	✓	Continually exploring the problem space through every phase of research and experimentation. *Also see d.school process.*
Empathy	✓			Step 1: d school design thinking method "Empathy is the foundation of human-centered design. The problems you're trying to solve are rarely your own, they're those of particular users. Build empathy for your users by learning their values."
Define		✓		Step 2: d school design thinking method "The define mode is when you unpack your empathy findings into needs and insights and scope a meaningful challenge." Part of the BizLab: 3-day workshop
Ideate		✓		Step 3: d school design thinking method "You ideate in order to transition from identifying problems to exploring solutions for your users." *Part of the BizLab: 3-day workshop.*
Prototype			✓	Step 4: d school design thinking method "Prototyping gets ideas out of your head and into the world. A prototype can be anything that takes a physical form—a wall of post-its, a role-playing activity, an object. In early stages, keep prototypes inexpensive and low resolution to learn quickly and explore possibilities." *Also: MVP*
Test			✓	Step 5: d school design thinking method "Testing is your chance to gather feedback, refine solutions, and continue to learn about your users." *Also: Experiment*
Discussion guide	✓		✓	A set of questions that the researcher uses to maintain focus and consistency across participants during research
Field notes	✓			Written and visual notes and recordings of what the researcher observes.
Stimuli	✓		✓	Tools, sketches, images, concepts, prototypes, or other tangible items used to elicit feedback from the participant during research or experimentation.
Screener	✓		✓	A questionnaire designed for recruiting. Questions that represent the attributes and characteristics of the people you wish to recruit.

Questions?

Sarah Bloomer, Experience Strategist
sarah@sarahbloomer.com

Ted Fuller, Business Technology & Analytics Lead
tdfuller@wbur.org

Joan DiMicco, Executive Director
jdimicco@wbur.org

WBUR BizLab

WBUR's BizLab is an innovation lab developing and testing new models of support for public radio. Operating as a lean startup, BizLab is a team of product managers, experience designers, and business analysts. We work with public radio stations to uncover new avenues for revenue generation, distinct from traditional approaches including on-air drives, direct mail, and underwriting.

WBUR, Boston's NPR News Station, created BizLab in 2015 believing it is critical that public media invest in innovation and experimentation to identify new revenue channels to sustain public radio into the future. Given the changing landscape of journalism, media consumption, and digital advertising, there is an increasing urgency to test and measure the effectiveness of different funding models.

These materials were created for 6 cohort stations who worked with BizLab from January - December 2019.