Discover Templates
By the

AppHaus

The creative design services team at SAP
Discover Templates

Help you understand your end users' needs and wants to identify opportunities for the innovation use case.
Keystone Activities
User research, synthesize, formulate problem statement.

Preparation
People: Include end users, key stakeholders during the research.
Place: Make sure research takes place in the environment of the users.
Dedicate a creative space and walls for synthesis.

How-To
Conduct user research to get insights on end users’ pain points and opportunities for improvement.
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Research Guides

Templates | Instructions | Example | Protocol

A workbook and interview script to assist with onsite observation & interviews with end-users for the project.
Discover The Problem Space 360° Research

Conduct field research
(primary)
Talk to End-Users
Talk to Stakeholders and Experts

Conduct other research
(secondary)
Look at thought leaders / analysts
Consider adjacent, analogous and other research
Conducting **Interviews**

- Pair up for interviews: *interviewer and note taker*
- Listen
- Be curious and ask why
- Be aware of body language (your own and interviewee)
- Take photos
- Collect artifacts
- Write down your impressions
How you ask **matters**

**Ask open-ended questions**

- ☓ Closed ended: results in a single word answer

**Do not ask leading questions**

- ☓ Do you like getting coffee?
- ✓ How is the getting coffee experience?
Pre-Visit Workbook

Workbook to send upfront the onsite observation & interview to the end-users for collecting a first feeling:

• Introduction
• Your Routine
• Best Day/Worst Day
• Tips & Tricks
Pre-Visit Workbook

Hello!

Thank you for participating in our research. The purpose of our meeting is to gain insights for:

My name is ____________________________
And I work in ____________________________
My current position is ____________________________
and I have been doing it for ________ years.

My main responsibilities include ____________________________

Please fill out this workbook. Do not worry about making it “pretty!” It will be of great help for our meeting.

I look forward to chatting with you!

Introduction (2 min)
Please tell us a bit about you below.

My name is ____________________________
And I work in ____________________________
My current position is ____________________________
and I have been doing it for ________ years.

My main responsibilities include ____________________________

Checklist (20 min max)

- Introduction (2 min)
- Your Routine (5 min)
- Best Day/Worst Day (6 min)
- Tips & Tricks (5 min)

Bonus points if you help capture the following through photos:

- Work environment
- Helpful tools, things, people
- Hindering actions, protocols

Draw yourself and your team here!
Your Routine (5 min)

Please **give us an idea of how you spend your day.**

What kinds of **activities** do you perform for your job?

How much **time** is spent each day doing each activity?

Please also include the following

- software, devices, tools/materials used
- people who are involved and/or talked to

**Rough sketches and keywords** are great, since you will have the chance to verbally elaborate when we meet.

<table>
<thead>
<tr>
<th>A few things I do...</th>
<th>Who I talk to...</th>
<th>How long it takes...</th>
<th>Things I use...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Your routine description</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This is just an example … No timeline is needed!
Your Best Days (3 min)
Take a moment to recall **days that feel great**
on the job

What happened?

What things (tools, protocols, or people) supported you?

Your Worst Days (3 min)
Take a moment to recall **not-so-great days** on the job

What happened?

What things (tools, protocols, or people) supported you?
Tips & Tricks (5 min)

What are 5 things that you would tell someone new to your group to help them succeed? (This does not have to be related to applications or software)

1) ____________________________________________
2) ____________________________________________
3) ____________________________________________
4) ____________________________________________
5) ____________________________________________

Thank you!

Please put here any notes (highlights, concerns) that you would like to discuss during our upcoming meeting.
Interview Guide Overview

Interview script guide to support the interviewer & the note taker during the end-user observation & interview:

• Introduction

• Personal Introduction

• Interview & Observation
  • Key tasks
  • Processes
  • Pain Points and room for improvement
  • User Journey for the processes

• Backup Questions for Interview

• Notes
Interview Guide

Introduction (5-10 min)

• We are Designers of [Your company]

• Project goal: [Project goal]

• We would like to capture your insights, understand the pain points and current situation.

“Don’t worry. This is not a test. We are not here to critique your way of working, but rather to fully understand your work and how you do it. We want to gain a general understanding of your task flows and all of the tools and resources that you use in relation to this scenario in your daily work. Please be open and honest! It is very important for us to get the real picture of your everyday tasks.”

• We are interested in any problems or unmet needs you have in relation with this scenario.

• This interview will take about max 60-90 minutes. You can have a break or stop the interview at any time.

• Is it alright with you for us to take pictures / recording of your work environment?

• Could we have screen shots printed out?

• The information that we gather in our session will be fully anonymous and confidential.
Personal Introduction (10 min)

Interviewee Name: ____________________________

Department: ________________________________

Date & Interviewer: __________________________

What is your official job title? ____________________________

How long have you worked in this role? ____________________________

Which software do you use? ____________________________

Which additional tools do you use?

☐ Telephone  ☐ Internal Guidelines  ☐ Copy machine
☐ Internal Guidelines  ☐ Books, Lists, Manuals  ☐ Printer
☐ Copy machine  ☐ Online (Intranet)  ☐ Print
☐ Mail  ☐ Files, Archives etc.

Further description of the workplace:

Equipment, hardware (e.g. number and size of screens), & tools are used. Take a picture/draw a sketch the user’s work environment. Look out for sticky notes, folders, filing baskets, and describe how they are used.

______________________________
Interview & Observation (30-45 min)

Note: Screenshots!

Key tasks (= use case)

Imagine that we were new colleagues, who are about to take on the same tasks as you in the future. *Show and tell us,* how you work so that we don’t struggle with the same difficulties and how your workaround is.

Which are your **main (E2E) processes** in your daily / regular business?

• 1  answer

• 2  answer

• 3  answer

• 4  answer

• 5  answer

Who are your **customer / stakeholders** (internally / externally)?

Are you **working in a team?**
Please show us the ______________ process

• What is the trigger of starting this process / using this report? (=why?)

• Which are your most important tasks or information?

• Who is your customer (internally / externally)?

• Are there any recurring tasks? If yes, which ones?

• How often and when do these tasks occur (e.g. weekly, monthly, periodicity)?
Pain Points and room for improvement

• Do you recognize any bottlenecks (e.g. communication)?

• Do you have further proposals for improvements?

• What do you like in current solution

• Is there anything else to tell us?

• Individual discussion based on pre-survey
User Journey for the__________process (30 min)
Please show us the ____________ process

• What is the trigger of starting this process / using this report? (=why?)

• Which are your most important tasks or information?

• Who is your customer (internally / externally)?

• Are there any recurring tasks? If yes, which ones?

• How often and when do these tasks occur (e.g. weekly, monthly, periodicity)?
Pain Points and room for improvement

• Do you recognize any bottlenecks (e.g. communication)?

• Do you have further proposals for improvements?

• What do you like in current solution

• Is there anything else to tell us?

• Individual discussion based on pre-survey
User Journey for the__________process (30 min)
Backup Questions for Interview

Per key task:

Activity
• How do you know when to start the task?
• (e.g. by work-lists, messages, email, telephone etc.)?
• Which concrete steps do you have to make in order to perform this task?
• How do you know you are done?
• Errors handling?

Information Flow & Exchange
• Which concrete information do you need in order to execute each of these steps?
• Where from (from whom) and in which form do you receive this information, e.g. which kind of reports, documents, access to specific databases or artifacts?
• Is the information you get sufficient? If no: which further information do you need to fulfill your task?

Decision Making
• Which decisions have to be taken in context of these tasks?
• How do you take the decision?
• Which decisions can be taken by yourself?
• Which decision needs to be taken by someone else?

Communication with other people / parties etc.
• Which additional persons (roles - e.g. tax payer, court) do you need to fulfill these tasks? What are these persons contributing then?
• How do you communicate with each of these process members (phone, eMail, letter, fax, face to face)?
• How (and where) do you document this?
• To whom do you need to transfer this information (e.g. status)?

General
• How do you ensure you fulfill your tasks in time?
• How do you document your work (e.g. notes)?
• What happens when you are not in the office?
• Career Path?
Unpack thoughts and experiences into tangible and visual pieces of information. Synthesize data into interesting findings and create insights which will be useful for creating solutions.
Synthesis Grid
Unpack thoughts and experiences into tangible and visual pieces of information

Share the stories and characteristics of users

Capture data points of the stories

Cluster & Highlight the key insights
Discover **Synthesis**

**Mass of unstructured information**
Result of research interviews

**Make sense of the data**
Synthesis

**Define a clear problem statement as focus for design**
Goal
How to debrief

To begin the synthesis grid, cover the walls with post it notes consisting of data points. Below are topics to consider:

- Role introduction
- Daily routine
- Best day/worst day
- Tips & Tricks for new employee
- Work environment
- Helpful tools, things, people
- Hindering actions, protocol
- How long does it take
- Who I talk to
- Extreme experience
- Story about last time
- Errors handling
- Career Path
- ...

We met ...
We observed...
We were surprised ...

Note taker
Interviewer
Synthesis participants
Synthesis Grid **Instructions**

### Duration
30-180 minutes

### Number of Participants
3-5 participants

#### Why & What
Unpack thoughts and experiences into tangible and visual pieces of information.

Get the team on the same level of knowledge about the research findings.

Synthesize data into interesting findings and create insights which will be useful for creating respective solutions.

Inspire the team to move toward identifying meaningful needs of people and insights.

#### How to use it
Outline the research approach (e.g. interviews), methods, and circumstances at the beginning of the session to summarize the effort.

2. Round the table: Share the stories and characteristics of users with your team mates.

*Images, movies, anecdotes, and quotes are useful to support your story and engage the audience. Encourage the audience to ask questions.*

3. Each team mate capture data points of that stories and stick them to the synthesis grid on the wall.

4. Cluster the data and define headlines for the different topics

5. Highlight the key insights with Golden Nugget frames.

#### Tips & Tricks
For the storytelling you can think about:

- Role introduction
- Daily routine
- Best day/worst day
- Tips & Tricks for new employee
- Work environment
- Helpful tools, things, people
- Hindering actions, protocol
- How long does it take
- Who I talk to
- Extreme experience
- Story about last time
- Errors handling
- Career Path ...
Synthesis Grid Template

User Characteristics

Goals & Needs

Pain Points

Most Surprising Facts

Ideas
Archetype of your users from research interviews to guide future design decisions.
Persona
Archetype created to represent goals and behaviors from user research

What are the typical characteristics that best reflect the users? (name, age, role, educational background)

What goals, tasks does the persona have?

What does she like? About what is she frustrated?
**Persona Instructions**

**Why & What**

Archetype of your users from research interviews.

Considering Personas helps to guide future design decisions. They give a human face to an otherwise abstract data.

_We work with Personas, so our developers don’t develop for themselves._” - SAP User Researcher

Personas are fictional characters, based on real data from your research interviews and created to represent user types and roles. They include goals, desires, tasks and limitations of the users.

**How to use it**

1. Include typical characteristics of users: face, name, age, educational background, etc.

   In context of the design challenge:

2. Describe
   - What is their role?
   - What is the goal they are trying to achieve?
   - What are the tasks to achieve the goal?
   - What is the trigger for these tasks?
   - How frequently do they complete those tasks?

3. Describe likes and dislikes.
   - What does the Persona like?
   - What frustrates the Persona?

4. Visualize.
   - Describe or sketch what their environment looks like.

**Tips & Tricks**

Knowledge about the users for the use case is a prerequisite in order to leverage this tool.

**Duration**

15-30 minutes

**Number of Participants**

3-5 participants
Persona Example

Demographics

My Name
Michael

My Age
29

My Education
Gymnasium A-Level
Company High Education
Program

My Background
Former Craftsman
10 years at the company
was in production line

Work Context

I work with ...
Channel Operator
Truck Driver

My environment looks like...
Forklift Cabin with
touchscreen
Shared Office with
desktop

Activities

My Role
Forklift Operator

My Goal
To be efficient
Bringing Value to
Company

My Tasks
Supply Production
Channels
Return goods to
basement

Frequency

Hourly
Daily
Weekly
Monthly

My Competencies
Power User — Casual User
Proactive — Reactive
Team Worker — Lone Fighter
Global Focus — Local Focus
Innovative — Conservative

Feelings

What motivates me?
Wants to learn more
Feels he’s part of the company
Team Loyalty

What frustrates me?
Double work of relabelling
Too much information on the screen
Scanner Quality
Persona Template

Demographics

- My Name
- My Age
- My Education
- My Background

Work Context

- I work with ...
- My environment looks like...

Activities

- My Role
- My Goal
- My Tasks
- My Competencies
  - Power User
  - Proactive
  - Team Worker
  - Global Focus
  - Innovative
  - Casual User
  - Reactive
  - Lone Fighter
  - Local Focus
  - Conservative

Feelings

- What motivates me?
- What frustrates me?

Frequency

- Hourly
- Daily
- Weekly
- Monthly
A User Experience Journey Map helps a team understand current challenges and motivations for the user over time to derive insights about the use case.
User Experience **Journey Map (As-Is Process)**
Structure your knowledge about the use case, in context of the persona and research

- **Write down the actions step by step**
- **Write down the corresponding mindset and touch points**
- **Mark the pain points and moment of truth**
User Experience Journey Map Instructions

**Why & What**
An User Experience Journey Map allows a team to gain a common understanding about the use case through the eyes of the user over time. It helps a team to realize current user challenges and motivations, as well as to derive insights about the use case and to articulate user needs.

It is an exercise used to layout the user experience in a chronological order, step by step, on a whiteboard or on a big poster. Knowledge about the use case and the user is key to conduct this exercise.

We use this activity to capture the As-Is Process during the Discover phase.

**How to use it**
1. Center lane: Write down the actions step by step. What actions does the user take while trying to achieve their goal and/or fulfill their tasks?

2. Top lane: Write down the corresponding mindset. What is on the user’s mind during this journey? How do they feel at each step of their journey?

3. Bottom lane: Write down the corresponding touch points. What touch points does the user have? What do they engage with while on the journey (tools, devices, conversations, other people, etc.)?

4. Mark the pain points and moments of truth.

**Tips & Tricks**
- **Moment of truth**
  A “moment of truth” describes a situation when something could go wrong and/or in which critical decisions have to be made.

- **Pain points**
  Situations that the user finds uncomfortable, frustrating or difficult are called “pain points”.

- **Tip**
  If ideas come up during the exercise, put them to an idea parking lot.
User Experience Journey Map  Example
As-Is Process

Persona: Michael, Forklift Driver

Activity 1: deliver goods from 24h buffer zone to channel

Mindset
- Avoid unnecessary screens
- Being smart and proactive
- Stupid system that requires me to manually update the view
- Which one is the nearest location
- Avoid driving into people and AGV

Action
- Activity 1: Deliver goods from 24h buffer zone to channel
- Navigate to the correct transaction
- Open 1 tab per channel/location
- Check the queue relevant for his location
- Select handling Task
- Drive to Destination

Touchpoints
- SAP EWM
- SAP EWM
- SAP EWM
- SAP EWM
- Forklift
User Experience Journey Map
Template
Problem **Statement**

Create a problem statement from insights learned as a "How Might We" question to help focus the problem into a statement of opportunity to generate ideas during the design phase.
Problem Statement How might we...? Translate the team’s learning about the user and the use case into questions

Start discussing what you have learned about the user and use case

What was interesting, inspiring and surprising? Why?

What are the insights and what are the most important needs?
Problem Statement Instructions

How might we...?

Duration
15-30 minutes

Number of Participants
3-5 participants

Why & What

A problem statement formed as a "How Might We" question helps focus the problem into a statement of opportunity to generate ideas during the design phase.

They serve as a basis for idea generation.

The dialogue and discussion within the team is key.

Creating "How Might We" questions is an exercise to frame questions that address the user’s needs and motivations.

How to use it

1. Discuss within the team
   • What have you learned about the user and their current journey?
   • What was most interesting, inspiring and surprising? And why so?
   • Articulate the insights, the most important user needs, limitations and conditions of success.

2. Start phrasing 3-5 "How Might We" questions by formulating the results from part 1 into questions. These questions are the basis for a first round of idea generation.

Tips & Tricks

Prior to this exercise, the team must have developed a common understanding about the user as well as the user’s needs, motivations, limitations and/or criteria of success.
Problem Statement **Example**

How might we...?

What can we do for our Persona?

**How might we help**

- Michael, Forklift Driver
  - works dynamically (4 tabs opened)

**Who**

- optimize his moving routes (driving back & forth)
- and prioritize the production needs

**Conditions**

- (Persona)
  - Who are you trying to help?

- (Conditions)
  - What did you learn from the UX Journey Map?
    - (conditions based on moment of truth and/or pain points)

**Achievements**

- (Achievements)
  - What does this Persona want to achieve?
    - (The Personas goals and tasks)
Problem Statement Template
How might we…?

What can we do for our Persona?

How might we help ____________________________ (Persona)
Who are you trying to help?

who ____________________________ (Conditions)
What did you learn from the UX Journey Map?
(conditions based on moment of truth and/or pain points)

to ____________________________ (Achievements)
What does this Persona want to achieve?
(The Personas goals and tasks)