Smart Growth Web Session III: Discover, Part 2

October 2, 2017
Welcome
Housekeeping

- This webinar is being recorded and will be available online within one week.
- All webinar attendees are muted to ensure sound quality.
- Ask a question any time by typing the question into the text box of the GoToWebinar Control Panel.
- If you experience any technical issues, email fbarroso@prosperitynow.org.
## Discover

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Activities</th>
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<tbody>
<tr>
<td>• State a hypothesis of the problem</td>
<td>1. Frame the Challenge</td>
</tr>
<tr>
<td>• Uncover assumptions</td>
<td>2. Prioritize the Challenge with a Logic Model</td>
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<tr>
<td>• Understand the problem</td>
<td>3. Diagnose the Challenge with a Journey Map</td>
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<tr>
<td>• Re-define problem statement</td>
<td>4. Conduct <strong>Individual Interviews</strong></td>
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<td></td>
<td>5. Synthesize <strong>Findings</strong></td>
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<td></td>
<td>6. <strong>Document</strong> Insights from Discovery</td>
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Today’s Agenda

- Purpose of interviewing in discover
- Overview of activities
  - Introduction to Activity 4. Conduct Individual Interviews
  - Introduction to Activity 5. Synthesize Findings
  - Introduction to Activity 6. Document Insights from Discovery
- Audience questions
- Next steps
Purpose of Interviewing
In a nutshell...

Quantitative Methods

Only one in 30 take the free ice cream. Interesting...

Qualitative Methods

What did you feel when you saw the free ice cream? Excited. A little scared.

And why was that?
Military doctors asked why so many severe eye injuries were occurring among soldiers.

— Michael Quinn Patton, Qualitative Research and Evaluation Methods (2014)
Smart Growth Story: LSS

- Client: Farida
- DMP Status/Result: Closed – Bankruptcy

“I tried to make changes. I moved to a smaller apartment and cut my expenses but it wasn’t enough. I worked and worked but it was never enough. Things kept coming up – car repair, emergencies. If I miss a paycheck, I have nothing. The bills will just pile up.”
Activity 4. Conduct Individual Interviews
ACTIVITY 4

Conduct Individual Interviews

The goal for conducting interviews is to seek information from clients that will help refine the challenge, journey map, diagnosis of successes and barriers, and logic model. Interviews can help to formulate insights and develop hypotheses about clients’ needs and their experiences with your product or service. Gathering this information cross-checks your own perceptions about how the project operates against the client’s perspective. Throughout the interview process, it is vital to maintain an open mind and a willingness to hear things with which you may disagree. The goal is to find out what the client experiences.

Steps in This Activity

Step 1. Identify Interviewees
Step 2. Identify Questions to Ask
Step 3. Draft Interview Script
Step 4. Assign Roles for the Interview
Step 5. Set Up the Interview
Step 6. Conduct the Interview

Expected Time:
2-3 hours to identify people to interview and create an interview script (Steps 1-3)
1-2 hours to reach out to people to interview (Step 4)
1.5-2 hours to conduct and document notes for each interview (Step 5-6)

Expected Results: By the end of this activity, you’ll have identified people to interview, created an interview script, conducted approximately 10 interviews and documented notes on your conversations.

HOW TO

Step 1. Identify Interviewees

Talking with people who have varying experiences with your challenge should yield helpful and sufficiently diversified information. Try interviewing at least 8-10 people you think experience the challenge and 3-4 people you think do not experience the challenge.
Steps in this Activity

Step 1. Identify Interviewees
Step 2. Identify Questions to Ask
Step 3. Draft Interview Script
Step 4. Assign Roles for the Interview
Step 5. Set Up the Interview
Step 6. Conduct the Interview

Expected Time: 3-5 hours
Step 1. Identify Interviewees

Talking with people who have varying experiences with your challenge should yield helpful and sufficiently diversified information. Try interviewing at least **8-10 people** you think experience the challenge and **3-4 people** you think do not experience the challenge.

<table>
<thead>
<tr>
<th>Identify Interviewees</th>
<th>People who experienced the challenge</th>
<th>People who did not experience the challenge</th>
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</thead>
<tbody>
<tr>
<td><strong>Which groups of people do you need to interview?</strong></td>
<td>Past clients with terminated Debt Management Plans (DMPs) due to nonpayment</td>
<td>Past clients who completed the DMP after a missed payment</td>
</tr>
<tr>
<td><strong>Where are places you can find people in the group?</strong></td>
<td>Pull list from client database for contacts</td>
<td>Pull list from client database for contacts</td>
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</tbody>
</table>
Step 2. Identify Questions to Ask

- Select options from the interview question bank below and add in your own questions to gain insight into issues you identified through earlier activities.

<table>
<thead>
<tr>
<th>Successes and Barriers (Select 1-2)</th>
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</table>
| ☐ What did you like about your experience with [project]?
  - What about that makes you like it?
| ☐ Tell me more about your experience with [project activity].
  - What did you dislike or find difficult about your experience?
  - What would you like to change about your experience?
| ☐ Which parts of the project were hard to complete? Which parts of the project were easy?
| ☐ What kinds of interactions did you have with staff?
| ☐ What might have been happening in your life outside the project that made it easier/harder to complete [activity]?
| ☐ ____________________________

Step 3. Draft Interview Script

- Once you have selected the proposed questions, add in a welcome and overview of the purpose of the interview.
Step 4. Assign Roles for the Interview

- Ideally, you should have at least two staff participate in each interview: one as the interviewer and another as the note-taker. If only one person can participate, it may be helpful to record audio from the interview, with permission, so that the interviewer can focus on leading the conversation and refer to the recording later on.

<table>
<thead>
<tr>
<th>Who will be the lead interviewer?</th>
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<tr>
<th>Who will take notes?</th>
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</table>
### Step 5. Set Up the Interview

**Where are you going to do the interviews?** Select an environment that's comfortable and convenient for the interviewee. This could mean finding a location that's private so they feel comfortable sharing openly and a location that's convenient based on their work and life commitments.

- Your office
- Neighborhood branch of your organization
- Coffee shop or restaurant convenient to interviewee
- Public library convenient to interviewee
- Interviewee’s home or place of work
- Other
- Location Name and Address:

**When are you going to do the interview?** It's best to conduct interviews at a time that's convenient to interviewees and when they are going to be free of distractions. This may mean meeting them after business hours or on the weekend.

- Dates/times available to conduct interviews:

**How are you going to invite interviewees?** When you invite participants—regardless of the channels you use—you should include the following components at a minimum:

- Explanation of the interview’s purpose
- Logistical details (e.g., where the interviews will take place, how long it will take)
- An actionable request indicating how they can confirm or decline the interview.

- Email
- Phone
- Text message
- Social Media
- In person
- Other
Step 6. Conduct the Interview
Activity 5. Synthesize Findings
ACTIVITY 5

Synthesize Findings

Interviews will result in a wealth of information that may not have clear meaning right away. Synthesizing the content will help distill that information into actionable insights. The common themes that emerge as you synthesize findings may also help you refine the work you have done throughout this discovery process.

**Steps in This Activity**

- **Step 1.** Review Interview Goals
- **Step 2.** Draw Out Potential Themes from the Statements
- **Step 3.** Finalize Discovery Work

**Expected Time:** 1-2 hours

**Expected Results:** By the end of this activity, you will have key themes drawn from the interviews you conducted. These statements will guide updates to your challenge, journey map, diagnosis of successes and barriers, and logic model.

**HOW TO**

**Step 1. Review Interview Goals**

The goal of this activity is to seek information from clients that help you validate or refine all of the following:

- Challenge
- Logic Model
- Journey Map
- Diagnosis of Success and Barriers

**Helpful Hint: Synthesize as You Conduct Interviews**

Synthesizing an interview is often easier and faster when the interview is still fresh in your mind. Consider completing Step 2 of this activity immediately after you conduct each interview.

**Step 2. Draw Out Potential Themes from the Statements**

What did you learn from the client's perspective?

Themes are statements that summarize the general sentiment expressed by the clients. These themes may serve to refine and revise insights gathered throughout the discovery process. Ask yourself the following questions as you review your interview notes to develop themes.
Steps in this Activity

**Step 1.** Review Interview Goals
**Step 2.** Draw Out Potential Themes from the Statements
**Step 3.** Finalize Discovery Work

**Expected Time:** 1-2 hours
Step 2. Draw Out Potential Themes from the Statements

<table>
<thead>
<tr>
<th>Themes</th>
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<tbody>
<tr>
<td>Challenge</td>
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<tr>
<td>What did you learn about the people who experience the challenge?</td>
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<tr>
<td>How did they compare to the people who did not experience the challenge?</td>
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<tr>
<td>Logic Model</td>
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<tr>
<td>How did the interviewees’ goals compare with the outcomes you identified in the logic model?</td>
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<tr>
<td>What challenges did interviewees encounter as they tried to meet their own goals?</td>
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<tr>
<td>Journey Map</td>
</tr>
<tr>
<td>How did the interviewees’ journeys compare to the ideal path?</td>
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<td>What factors led to important decisions related to the challenge?</td>
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<tr>
<td>What was taking place outside the project that is important to consider?</td>
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Activity 6. Document Insights from Discovery
ACTIVITY 6

Document Insights from Discovery

After completing the discovery process, it’s important to document your insights in a format that is easy to share and communicate. Documentation is key to keeping a final record of your work, helping you include additional stakeholders in future work, shaping your “ask” in fundraising efforts and reporting back to staff and participants about what you’ve learned.

**Steps in This Activity**

- Step 1. Summarize Key Insights
- Step 2. Finalize Logic Model
- Step 3. Finalize Journey Map

**Expected Time:** 1-3 hours

**Expected Results:** By the end of this activity, you will have finalized documents that summarize your findings from the discovery process in a format that’s easy to share with staff, funders, partners or participants who need to be engaged in your work or part of the process of designing a solution.

**HOW TO**

**Step 1. Summarize Key Insights**

The first step is to put all your key insights from the different activities into a succinct list of key points. These can become your talking points to be adapted to various communication mediums.

**Example: AIM Consolidated Credit Counseling Services (AIM CCCS)**

<table>
<thead>
<tr>
<th>Summarize Key Insights</th>
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<tbody>
<tr>
<td><strong>Challenge</strong></td>
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<tr>
<td><strong>People who experience this challenge are:</strong></td>
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<tr>
<td><strong>Logic Model</strong></td>
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Steps in this Activity

Step 1. Summarize Key Insights
Step 2. Finalize Logic Model
Step 3. Finalize Journey Map

Expected Time: 1-3 hours
Step 1. Summarize Key Insights

- The first step is to put all your key insights from the different activities into a succinct list of key points.
- These can become your talking points to be adapted to various communication mediums.

<table>
<thead>
<tr>
<th>Logic Model</th>
<th>Summarize Key Insights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Challenge</td>
<td>The challenge we want to address is:</td>
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<tr>
<td></td>
<td>The people who experience this challenge are:</td>
</tr>
<tr>
<td></td>
<td>The consequence(s) of not addressing this challenge is/are:</td>
</tr>
<tr>
<td>Journey Map</td>
<td>The barriers we should address in a solution are:</td>
</tr>
<tr>
<td></td>
<td>The successes we should leverage in a solution are:</td>
</tr>
</tbody>
</table>

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prosperitynow.org
What questions do you have?
What’s Next?
Suggested Next Steps

Web Session III: Discover, Part 2
You will have 2 weeks to complete this session. It may help to start Activity 4 the first week and Activities 5 and 6 the second week.

- Attend Session III on October 2, 3:30p ET (30 mins) – DONE!
- Complete Activity 4: Conduct Individual Interviews (3-5 hrs)
- Complete Activity 5: Synthesize Findings (1-2 hrs)
- Complete Activity 6: Document Insights from Discovery (1-3 hrs)
- [Optional] Attend Q&A session on October 9, 3:30p ET (30 mins)
- [Optional] Sign up for feedback session with Prosperity Now mentor

Attend Web Session IV: Design on Oct. 16, 3:30p ET