1b. Storytelling for Understanding the User. Methodology Tools to Understand Needs through User-Centered Design approach

Image: courtesy of d+b Intersection

Open educational resource developed by:

LCI Barcelona

Introduction

Storytelling is the interactive art of using words and actions to reveal the elements and images of a story while encouraging the listener's imagination, as it's definition by the National Storytelling Network.*(1) For this chapter the focus relies on storytelling application for story presentation -a narrative development-, and how it captivates audiences. To discover new business opportunities and bring new solutions, designers use storytelling to get insights into users, build empathy and reach them emotionally. As the Interaction Design Foundation indicates, by crafting stories, designers can better understand what users want from a solution. *(2) Storytelling is a helpful resource that can be used in many phases across the user-centered design (UCD) process, that is an iterative design process in which designers focus on the users and their needs in each phase of the design process. In UCD, design teams involve users throughout the design process via a

1. NSN, Explanation of storytelling, NSN Resources.
2. Interaction Design Foundation, The Basics of User Experience Map

variety of research and design techniques, to create highly usable and accessible products for them. *(3) For understanding user role, needs, goals and the reason for the goal, Storytelling is often paired with User and Personas Map, User Experience Journey Maps and , Storyboards among other ethnography activities. Those activities are mainly focused in one hand on observing people and their behaviour in context, and in another, on the human story and the ability of that story to communicate.

3. Quesenberry, W. And Brooks, K (2010). Storytelling for User Experience: Crafting Stories for Better Design. Brooklyn, New York. Rosenfeld Media, LLC

Goals

This OER is an invitation to apply the benefits of Storytelling through the User-Centered Design (UCD) process and its phases to get insights, identify user needs, generate ideas and implement solutions that are valuable to users. The main goal is for students and professionals from the advanced textile sector to get familiar, feel confident with communicating findings and innovation offers with stories, and work with Storytelling innovative and creative methodology tools. These tools can be implemented along the UCD cycle, which will allow them to envision scenarios, while taking into account and involving end-users at specific times during the design process.

Structure
1. **Storytelling and User-Centered design approach**
2. **Persona Map**
3. **User / Customer Journey Map**
4. **Storyboard Solution Canvas**
5. **Storytelling Canvas**

Learning Outcomes

Knowledge:

· The comprehension of how storytelling can be applied for empathy and understanding of people's needs.

· An application of learning-by-doing dynamics to create stories and bring innovative solutions through a user-centered design process.

Skills:

· Feel confident to use stories to communicate and connect emotionally with stakeholders and users while working collaboratively within multidisciplinary teams.

· Craft stories for research, empathize with people needs, ideate scenarios, and prototype solutions.

Competences:

· To communicate with empathy and create impact.

· To work collaboratively within teams to generate solutions.

· To apply critical thinking to map out key information and solve problems creatively.

Terminology

Ethnography

The disciplines that is the basis for field methods in user research (that is, observing people and their behavior in context), also focuses on the human story and the ability of that story to communicate.

Experience

Practical contact with and observation of facts or events.

Insight

A clear, deep, and sometimes sudden understanding of a complicated problem or situation, or the ability to have such an understanding. **Customer Insight** - an interpretation of trends in human behaviors which aims to increase the effectiveness of a product or service for the consumer, as well as increase sales for the financial benefit of those provisioning the product or service.

Persona Canvas

Helps you focus more on the mental model you have of a person or group of people – the picture of the persona that you share as a team. Making it visual makes sure everyone has the same picture. And you can use it to create a mental model or profile of ANY person or group.

Solution Storyboard Canvas

To communicate, create or improve innovative solutions. It might include a common situation where the user interacts with an existing solution or can describe a hypothetical implementation of a new solution prototype

Storytelling

The interactive art of using words and actions to reveal the elements and images of a story while encouraging the listener's imagination Touchpoint

A point of contact or interaction, especially between a business and its customers or consumers

Usability

The extent to which a product can be used by specified users to achieve specific goals with effectiveness, efficiency and satisfaction in a specified context of use

User-centered design (UCD) process

An iterative design process in which designers focus on the users and their needs in each phase of the design process

User Journey Map (or Customer Journey Map)

A diagram that visually illustrates the user flow through your site, starting with initial contact or discovery, and continuing through the process of engagement into long-term loyalty and advocacy

1. Storytelling and User-Centered design approach

Why and benefits of Storytelling in User Centered Design

Storytelling is a powerful resource in user centered design and there are several methodology tools that can be implemented along the process for a wide range of purposes. It can be used to describe a context or situation, like stories that are part of a specific individual, a "persona". Storytelling can illustrate problems and "points of pain", explaining why a new solution is needed. In addition, it can be a starting point for a design discussion, exploring a new design concept, or describing a new design. When applying Storytelling in User-Centered design, it plays a more active and complex role than just a transfer of information, because it not only describes actions, but also explains them and sets them into a context that helps to understand why those actions happened. Some of the most important roles that storytelling plays in the user-centered design process are the following: It explains, engages the imagination, sparks new ideas, creates shared understanding and can persuade. *(4)
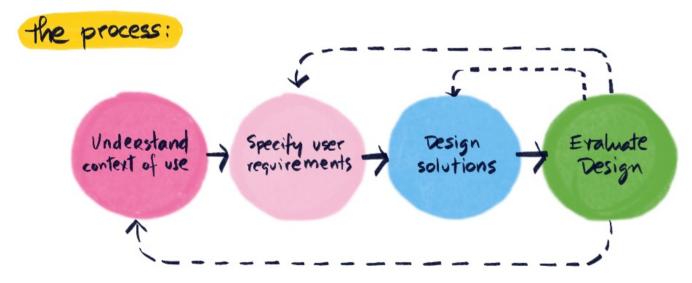
User Centered Design Process

As storytelling can be implemented at many points through the user centered design for different purposes, let define what it is and how the User-Centered Design process works.

4. Quesenberry, W. And Brooks, K. (2010). Storytelling for User Experience: Crafting Stories for Better Design. Brooklyn, New York. Rosenfeld Media, LLC

User-Centered Design is an iterative process that focuses on the understanding of the users, designing a product, and doing whatever it takes to make the product work for them. From the very beginning and along the different phases of the design process, users are taken into account and participate actively, when needed, by validating assumptions, hypotheses or design prototypes, and by giving valuable feedback on what works or not for them.*(5) The goal of the User-Centered design is to make products, which have very high usability.
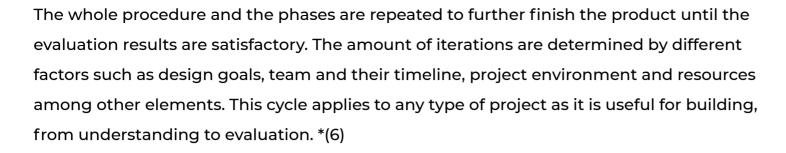
The UCD process involves four general phases: 1) Understand the context of use, 2) Specify requirements, 3) Create design solutions and 4) Evaluate design.

Image 2: User-Centered Design process

5. Still B, Crane K. (2016). Fundamentals of User-Centered Design: A Practical Approach. Taylor & Francis Group

The whole procedure and the phases are repeated to further finish the product until the evaluation results are satisfactory. The amount of iterations are determined by different factors such as design goals, team and their timeline, project environment and resources among other elements. This cycle applies to any type of project as it is useful for building, from understanding to evaluation. *(6)

There are several ways and methodologies on how to involve and understand the users along the design process, and here is where storytelling methodology tools play a key role for that purpose. Those approaches and methodologies include some form of stories and scenarios, as a way to communicate how users will interact with a product, create solution prototypes, test the assumptions, and receive feedback from users on how successful the designed scenario is. The key is that stories and storytelling helps to keep people at the center of the design process and its main role is to capture testable requirements in a rapid, simple way.*(7)

Through the next 4 chapters, students will learn step-by-step how to put storytelling to work in user experience design, in detail, through visual creative tools.

6. Still B, Crane K. (2016). Fundamentals of User-Centered Design: A Practical Approach. Taylor & Francis Group

7. Quesenberry, W. And Brooks, K (2010). Storytelling for User Experience: Crafting Stories for Better Design. Brooklyn, New York. Rosenfeld Media, LLC

2. Persona Map

User-Centered Design starts and ends with the user *(8). Understanding the context of use needs to identify who the primary users of the product are, why they will use the product, what their requirements are, and under what environment they will use it. As the primary goal is to learn as much as possible about a user and his/her needs, we will start to envision and build a Persona / User profile.

The **Persona Map** (often referred to as user persona, customer persona , or buyer persona) is a fictional character created to represent a user or customer type. The persona puts a potential new solution (e.g. a website, a brand, a product, or a service) into the context of the respective needs and the jobs to be done. *(9)

Image 3: Student presenting different Persona Maps stories

8. Still B, Crane K. (2016). Fundamentals of User-Centered Design: A Practical Approach. Taylor & Francis Group

9. Lewrick M., Link P., Leifer L. (2020) The Design Thinking Toolbox: A guide to Mastering the Most popular and Valuable Innovation Methods. Hoboken, New Jersey. John Wiley & Sons, Inc.

Duration

Pre - activity material collection and research (depends on information gathering dedication time).

30 - 45 minutes of a group discussion for a mere creation of a customer profile. If we want to create a more extensive profile by adding images or sharing interviews and videos, more time must be planned. The time will vary depending on the design challenge.
If there are several problem statements or targets, a separate user profile or persona should be created for each of them.
Post - activity information absorption (depends on dedication time). In addition, it can be updated along the design process.

Organisation

This activity is ideally conducted within a multidisciplinary team that should be able to meet the persona like a real person. The design team can work in groups of 2, up to 6 members, in order to actively take part in the discussion and contribute observations and insights. If there are many user profiles, it can also be decided and worked on individually by each team member, and then completed through a group discussion.
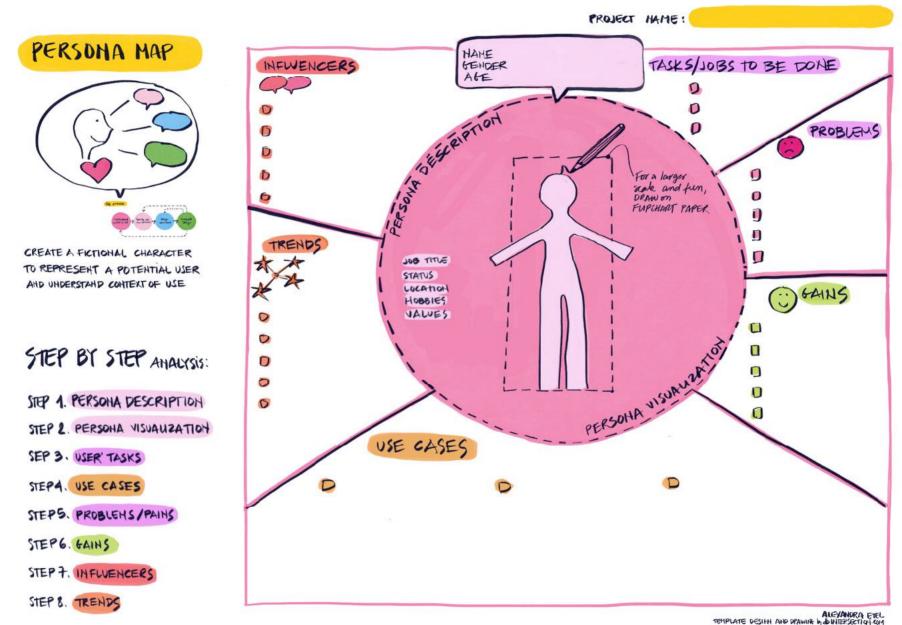
Preparation

The material required are:

• A Persona Map template or a structure drawn in a whiteboard or flipchart.

- Sticky notes, post-its, pens and markers. Photos from observations of potential users in their natural environment.

Image 4: Persona Map Template can be downloaded on this link

Step-by-Step method

A persona should be described as accurately as possible. The objective is to envision users' likely experiences and to gain empathetic insights. Think of creating some characters and bringing them to life with descriptions and photographs. Those personas are fictional characters, created from the insights from an exploratory research and collection of information for a potential user. Before starting with the template, discuss with the team which type of persona and define the user that can best represent and exemplify certain attributes needed for the design challenge. Let's start mapping!

Step 1: Persona description

Describe the persona. Start by giving the persona a name, gender and age. Add additional demographic information such as social milieu, family, hobbies and general interests.
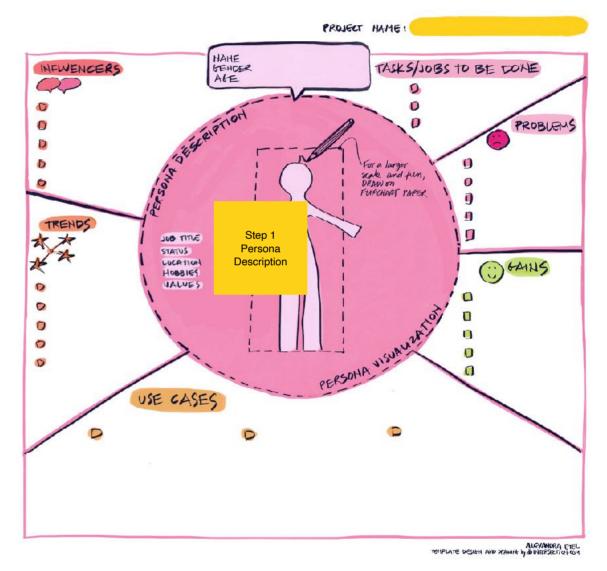

Image 5. Persona Map with Step 1: Persona description

Step 2: Persona visualization

Visualize the user "character" with a drawing, sketch, photo, a mood-board or a collage composition made with magazine clippings and images. Represent it visually in order to know how it looks.

Step 3: User tasks /jobs to be done

Identify the user's tasks and jobs the user does and think where can he/she be helped?

Step 4: Use cases

Describe all use cases in the context of the design challenge and problem statement (Where? What? How?). Where does the user makes use of our innovation offering? What happens before and after? How does s/he do it and interact?

Step 5: Problems /Pains

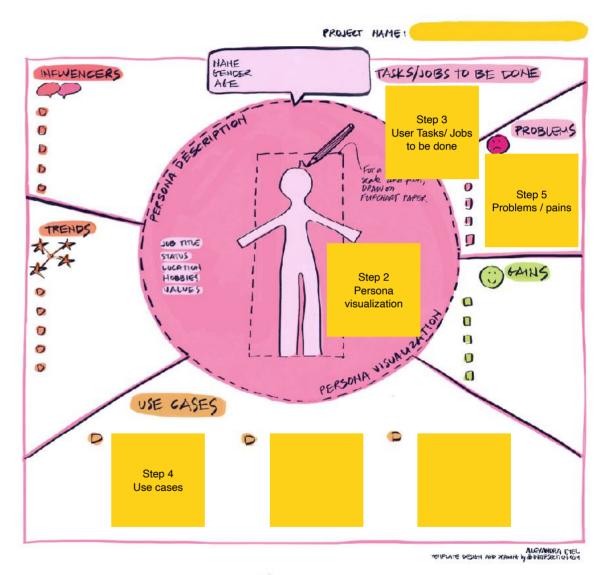Empathize with the persona "character", put in his/her shoes and recognize what are the

Image 6. Persona Map with Step 2, 3, 4,and 5: Persona visualization, User tasks, Use cases and Problems.

biggest difficulties and problems the user has. They can be unsolved problems or difficulties the user has with existing products and offers.

Step 6: Gains

Now determine the gains that are the possibilities and benefits the user might deserve to obtain in order to overcome the previous pain and problem.

Step 7: Influencers

Identify who are the key persons who have the influence on the user persona, like family members, friends, stakeholders, work colleagues or even public personalities. They can all impact users' behavior.

Step 8: Trends

Define current mega trends, market trends, environmental, technology or social trends that can impact and influence the persona.
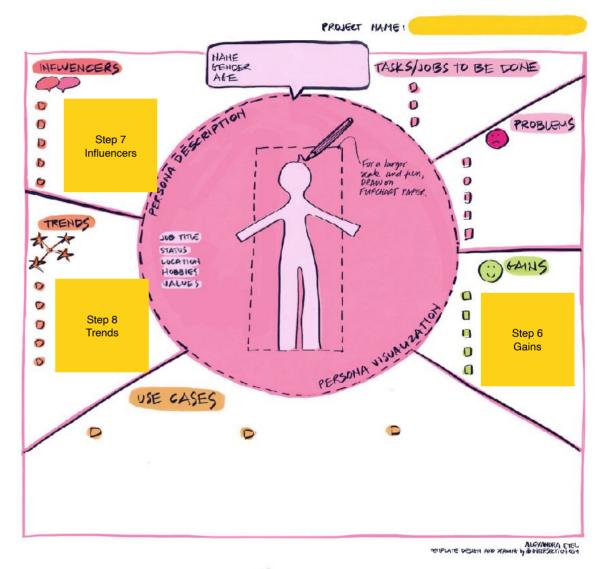

Image 7. Persona Map with Step 6, 7 and 8: Gains, Influencers and Trends

Key learnings

The Persona Map allows you to come with a consistent understanding of a target group and document stories and pictures that a typical user / customer experiences. Even though the Personas are fictional characters, they can provide real motivations and a wide range of different perspectives on a design challenge, allowing design teams to define, create compelling stories, and engage with different user groups. This leads to building radical innovations, through User-Centered design.

Image: courtesy of d+b Intersection

Image 8: Students building a Persona Map

3. User / Customer Journey Map

The Journey Map will help to specify user requirements or user goals that must be met for the product to be successful. A **User or Customer Journey Map** provides a representation, vivid visualization and a structured storytelling of how the user experiences interacting with a product or service through a specific journey. The touchpoints where users interact with the product or service are often used to construct a journey -an engaging story based upon their experiences. The resulting map is a visual depiction of what users need and what steps they take to fulfill those needs as they interact with a product. Its main purpose is to create a visual that displays what users/customers are trying to do, what steps they want to take to do it, and what emotions or thoughts they experience as they carry out these steps.

Image 9: Students presenting User Journey Map

Duration

1 - 2 hours of a group mapping and discussion to create the first draft. The time may vary depending on complexity.

Post - activity information absorption and might be needed for further discussion depending on user feedback and variations.

Organisation

Create mixed teams of 2-6 people with different backgrounds to map-out and create the the journey storytelling. Each participant can take 2 or 3 issues to work on.

Feel confident to personalize and include hand-drawn icons, sketches or pictures along with the personal quotes and commentary.

Preparation

The material required are:

· A completed Completed Journey Map

· Sticky notes, post-its, photographs, pictures, pens and coloured markers.

· Large wall or whiteboard where to hang up and display all the pictures, persona map and
  Journey Map template.

Image 10: User Journey Map Template can be downloaded on this [link](#)

Step-by-Step method for mapping the customer experience

Before starting, here are some tips and considerations to be taken into account:

- Think creatively like an investigative journalist would ignite by asking questions to deepen the emotional user journey substantially.
- Take into consideration the context (person and scenario) where the experience takes part.
- Create actions and goals, user expectations and failures, as they are "journeys" themselves that can be used to design a future experience or solution.

Step 1: Persona and user profile

Identify a persona for whom the journey will be created. Share the story of the persona with the design team. Use the key information displayed at the Persona Map to create a compelling storytelling.
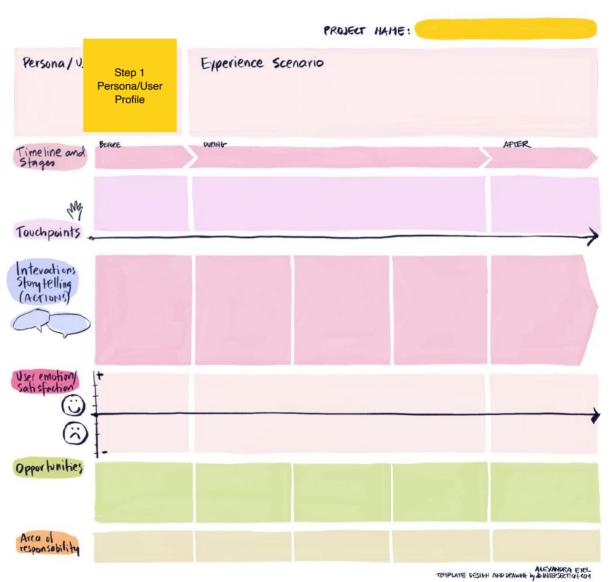

Image 11: User Journey Map with Step 1: Persona and User Profile

Step 2: Experience Scenario

Describe the scenario where the experience takes place or the job to be done. What does the persona do and what is the context? It can be an end-to-end experience or a specific part of it.

Step 3: Timeline and stages

Define at least 5 moments in the journey. That includes what happens BEFORE, DURING, and AFTER the actual experience to be sure that the most important steps are included. Take into consideration the following questions: What is the time span? What is the step-by-step experience? How much time has passed in the journey? It's not necessary to overcomplicate and let's keep it clear to share and test with the If necessary create different options and agree within the team the one that best suits the user experience.
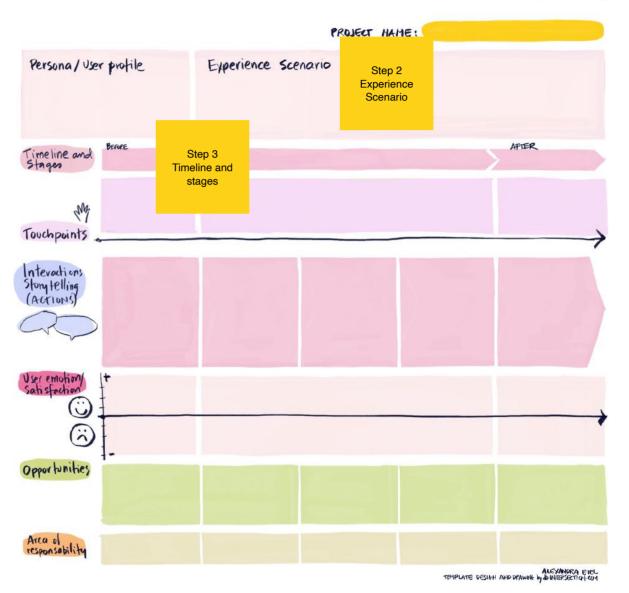

Image 12: User Journey Map with Step 2 and 3: Experience Scenario and Timeline

Step 4: Touchpoints

Identify the physical touch points where users interact with the product or service. These can be from personal face to face contact between individuals, to virtual interactions with a website or physical application of the product. (e.g., in a hospital, a shop, online platform, by phone, mail or in contracts).

Step 5: Interactions Storytelling

Describe which actions and stories take place on each stage and which interaction should be assigned where and how. Include in the story what the user thinks while the persona is interacting. Discuss or brainstorm, within the group and map them out on post-its. In addition, video interviews and pictures can get a lot of insight and visual information for an engaging set of materials.
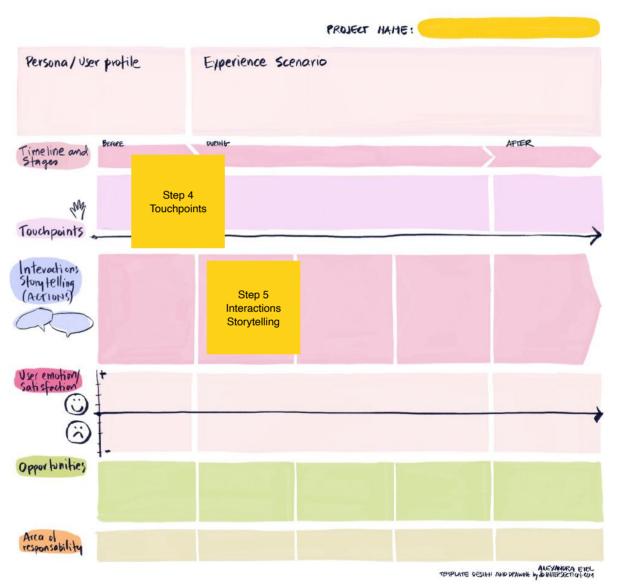
Image 13: User Journey Map with Step 4 and 5: Touchpoints and Interactions Storytelling

Step 6: User Emotion and satisfaction

What is the user mood at every interaction? Are they happy, frustrated, angry? Capture the emotional status with glue dots or emoticons.

Step 7: Opportunities

Identify potential areas of improvement by analysing each stage's stories.

Step 8: Area of responsibility/process owner

Define the people responsible for the action / process within the organization.

As a result of previous steps, a customer journey mapping activity should provide a high-level overview of all activities and factors that influence the user experience. It is a storytelling of the user experience that will help to Identify any business requirements or user goals that must be met for the product to be successful. *(10)

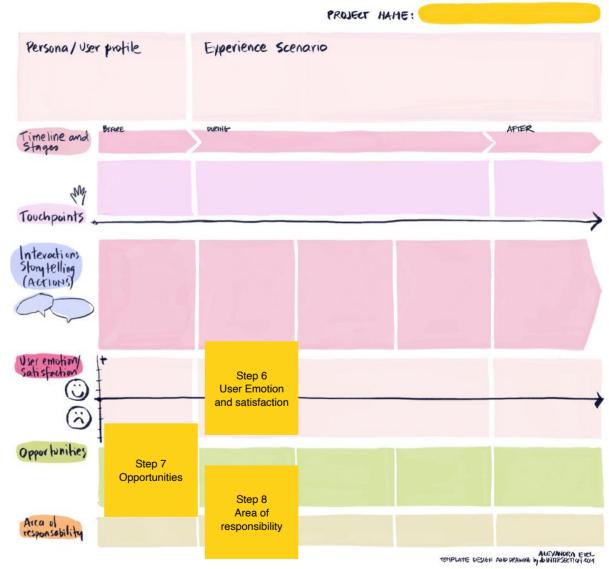

Image 14: User Journey Map with Step 6, 7 and 8: User Emotion, Opportunities, Area of responsibility

10. Still B, Crane K. (2016). Fundamentals of User-Centered Design: A Practical Approach. Taylor & Francis Group

Key learnings

· The customer journey map helps the team to come to a shared common understanding of the user and his problems by capturing the emotions along the journey.

· The touch points show the points of contact the user has with the product or innovation offer. They can be selectively optimized in order to offer the user the desired experience *(11)

· Bad emotional experiences detected during the user journey are opportunities for innovation.

Image: courtesy of d+b Intersection

Image 15: Students creating user stories with Journey Maps

11. Lewrick M., Link P., Leifer L. (2020) The Design Thinking Toolbox: A guide to Mastering the Most popular and Valuable Innovation Methods. Hoboken, New Jersey. John Wiley & Sons, Inc.

4. Solution Storyboard Canvas

Design teams use **Solution Storyboard Canvas** to communicate, create or improve innovative solutions. It might include a common situation where the user interacts with an existing solution or can describe a hypothetical implementation of a new solution prototype. A storyboard is a series of drawings or pictures that visualize a particular sequence of events that helps to visualize and low -prototype an innovation offer or new concept from start to finish. Storyboards do exactly what the title implies -they allow stories about user experience to be brought into the design process. The kinds of stories used are those that provide a perspective on a service or prototype - they're visual narratives that show these interacting with the solution. *(12)

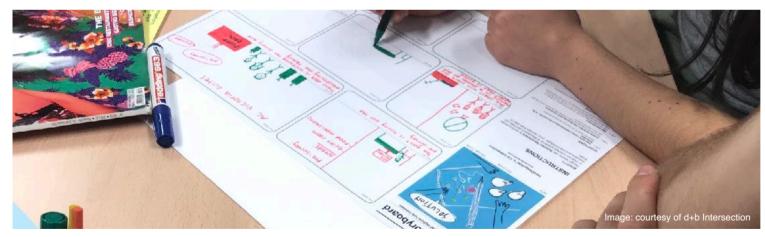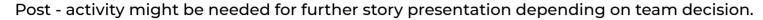Image: courtesy of d+b Intersection

Image 16: Solution design with the Solution Storyboard Canvas template.

12. Stickdorn M., Schneider J. (2010). This is service Design Thinking. Amsterdam, The Netherlands. BIS Publishers.

Duration

1 - 2 hours of a group discussion and story creation. The time may vary depending on story detail and complexity.

Post - activity might be needed for further story presentation depending on team decision.
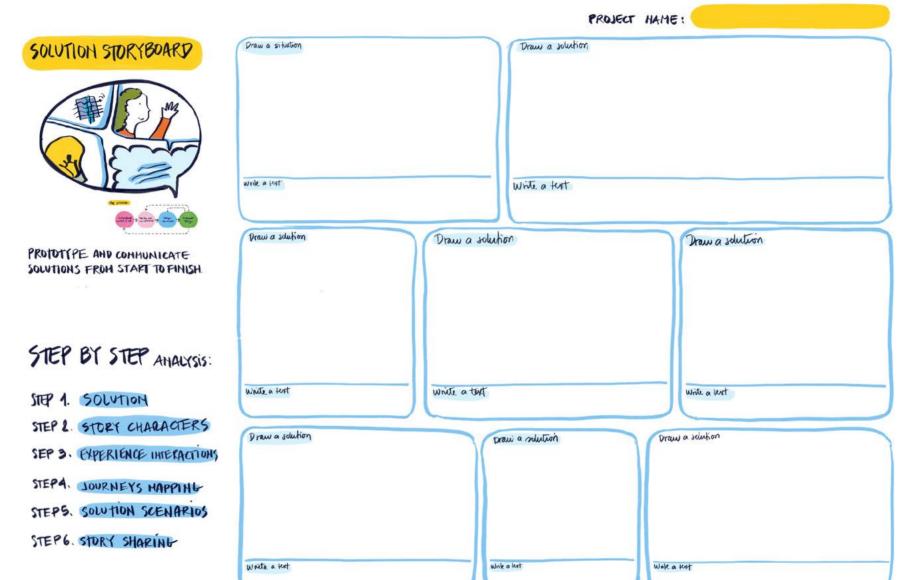
Organisation

Teams of 2-6 people with different backgrounds to create the story with visuals and corresponding narratives. Create several versions including hand-drawn icons, sketches or pictures and photographs.

Preparation

The material required are:

• The Solution Storyboard Canvas template.

• Sticky notes, photographs, pictures, pens and coloured markers.

• Large wall to hang up and display the canvas.

Image 17: Solution Storyboard Canvas template can be downloaded on this link

Step-by-Step method

Think like a filmmaker and what you want to envision through each sequence. The story-board is the trusted first-stage prototype in all of these fields. *(13) Storyboarding can be completed into 6 steps.

Step 1: Solution

Start with a good understanding of the solution to be illustrated. Determine what is the innovation offering concept that you want to visualize and prototype. Collect all existing user research.

Step 2: Story characters

Choose one representative user for your storyboard.

Step 3: Experiences interactions

Describe the experiences that a typical user will have while interacting with the proposed solution. Start from the beginning.
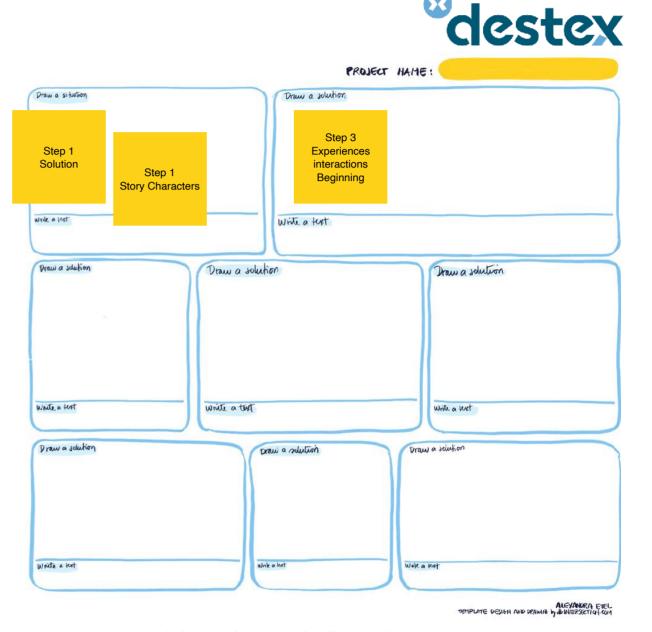

PROJECT NAME:

Draw a situation

Step 1
Solution

Step 1
Story Characters

Write a text

Draw a solution

Step 3
Experiences
interactions
Beginning

Write a text

Draw a solution

Write a text

Draw a solution

Write a text

Draw a solution

Write a text

Draw a solution

Write a text

Draw a solution

Write a text

Draw a solution

Write a text

TEMPLATE DESIGN AND DRAWING by dbINTERSECTION.COM
ALEXANDRA ETEL

Image 18: Context Analysis Map with Step 1: Visualize a business Idea

13. Still B, Crane K. (2016). Fundamentals of User-Centered Design: A Practical Approach. Taylor & Francis Group

What is the first interaction the user will have with the product? Illustrate this first interaction in the first frame. Draw and illustrate the situation inside each frame and describe the situation with texts. Each scene, or frame, explains a key part of the user's story and words and actions conveyed through drawings.

Step 4: Journeys mapping

Map-out user journeys through imagined situations. Indicate on through each sequence where the user will encounter the solution. Describe how experience value is being created by your concept, during those interactions.

Step 5: Solution scenarios

Illustrate scenarios with frame-by-frame scenes and essential number of words to convey the story. Continue creating scenes for each major step and user emotion. Make sure you have a clear beginning, middle, and end to your storyboard.
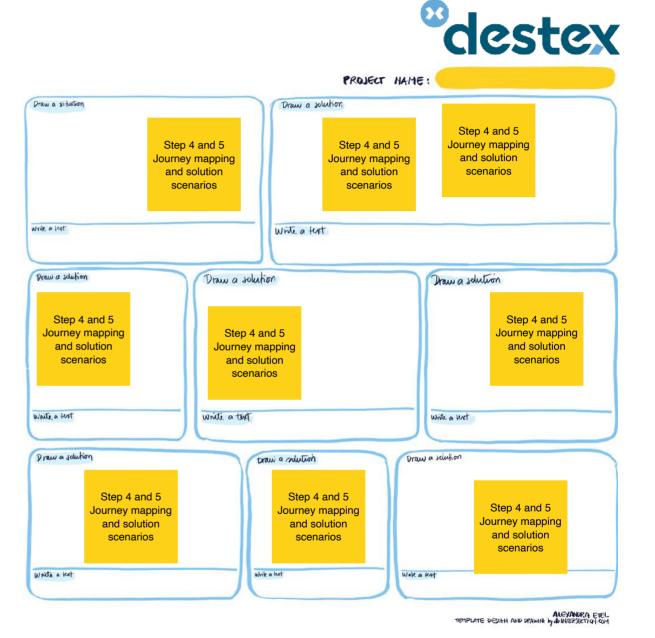

Image 19: Context Analysis Map with Step 1: Visualize a business Idea

Step 6: Story sharing

Share and review the story with real users and stakeholders for feedback. Use this feedback to further refine the concept. It will bring the user perspective into the design process.

Revise the storyboard as you begin collecting more information through brainstorming, research, and design prototypes.

Image 20: Story sharing example

Key learnings

- Solution storyboards create and provide constructive feedback as ideas are pitched to users. It's a faster and cheaper way of prototype.

- Storyboards can be used not only to tell others about a user's experience, but also to discover a user's experience.

Image: courtesy of d+b Intersection

Image 21: Team working with the Solution Storyboard Canvas.

5. Storytelling Canvas

Storytelling Canvas is a tool created to make it easier to construct a story that people care to listen to. Standard Powerpoint presentations, most of the time, lack the emotional depth and do not make the deserved effect and impact to communicate a story. The purpose of this canvas is to help build stories step-by-step that resonate. Neurological research shows that the same areas are activated in the brain of a listener as in the brain of the storyteller. As stories engage emotions and other senses, the listener can "relive" the moment and really learn from it. That's something the numbers on a page can never do.

Image 22: Ideation session with What if...? Questioning.

Duration

45 - 60 minutes hours of a group discussion and story creation. The time may vary depending on story detail and complexity.

Post - activity might be needed for team discussion to analyse user feedback.

Organisation

Teams of 3-5 people per group. Create drafts individually and bring it to the group to create a shared version through group discussion.

Preparation

The material required are:

• The Storytelling Canvas template.

• Sticky notes, photographs, pictures, pens and coloured markers.
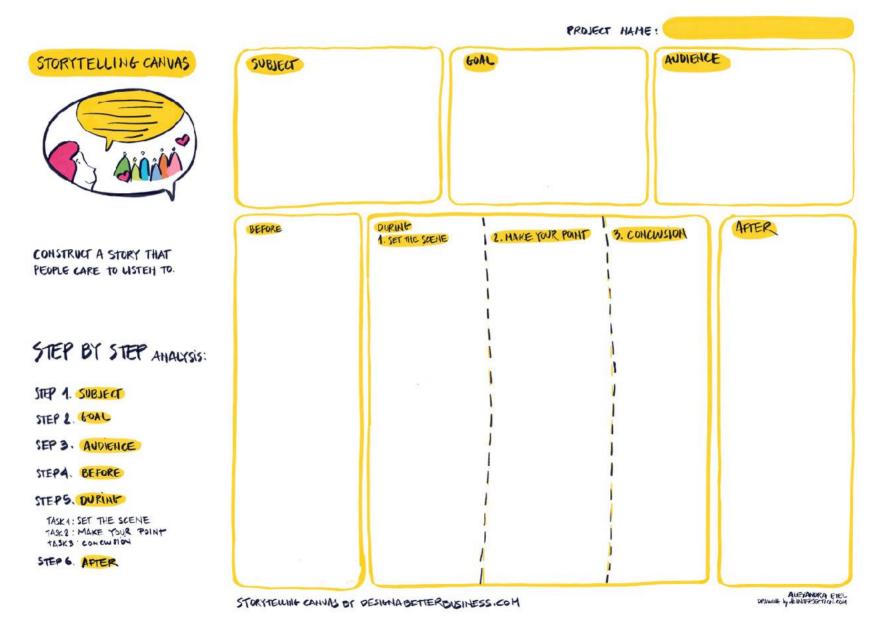
• Large wall to hang up and display the canvas.

STORYTELLING CANVAS

CONSTRUCT A STORY THAT PEOPLE CARE TO LISTEN TO.

STEP BY STEP ANALYSIS:

STEP 1. SUBJECT

STEP 2. GOAL

SEP 3. AUDIENCE

STEP 4. BEFORE

STEP 5. DURING

TASK 1: SET THE SCENE
TASK 2: MAKE YOUR POINT
TASK 3: CONCLUSION

STEP 6. AFTER

PROJECT NAME:

SUBJECT

GOAL

AUDIENCE

BEFORE

DURING
1. SET THE SCENE
2. MAKE YOUR POINT
3. CONCLUSION

AFTER

STORYTELLING CANVAS BY DESIGNABETTERBUSINESS.COM

ALEXANDRA ETEL
DRAWING by dbINTERSECTION.COM

Image 23: Storytelling Canvas template can be dowloaded on this link

Step-by-Step method

A good story is not a straight line; it has ups and downs . Creating a story is an opportunity to create an emotional roller-coaster. Define where the story climax moment is. That is the moment to use to make a main point.

Stories have 3 main parts: The beginning is where the scene will be set. The middle is where the story will have its main plot and the end is where the audience will be left with a new state of mind! Let's create a story with the template.

Step 1: Subject

What is the title and subject of the story?

Step 2: Goal

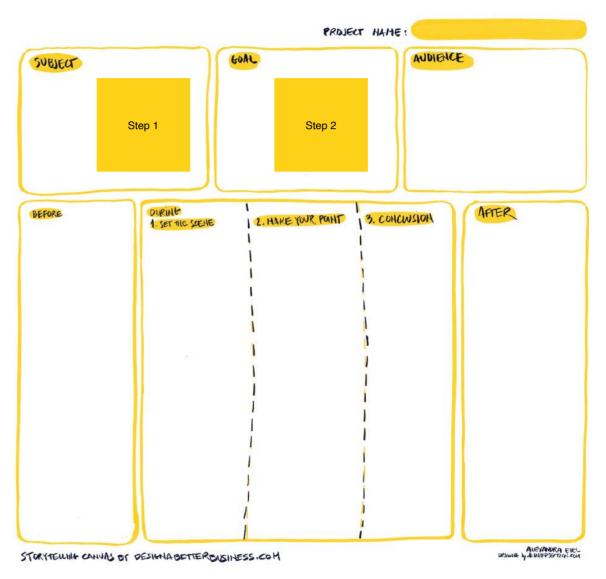What is the goal you want to achieve? Why are you telling the story?

Image 24: Storytelling Canvas Step 1: Subject and Step 2: Goal

Step 3: Audience

Who is your audience? Map them as a persona.

Step 4: Before

What do your audience members feel, think, know, want, etc., about the subjects in your story before they hear it?

Step 5: During

1) Task 1: Set the Scene

Create a context (based on emotion, ethics, or facts), that helps the audience get in the mood of things.

2) Task 2: Make your point

What is the main message you want to come across which will help support a change of heart with the audience?

3) Task 3: Conclusion

What are the arguments, facts and the anecdotes in your story?
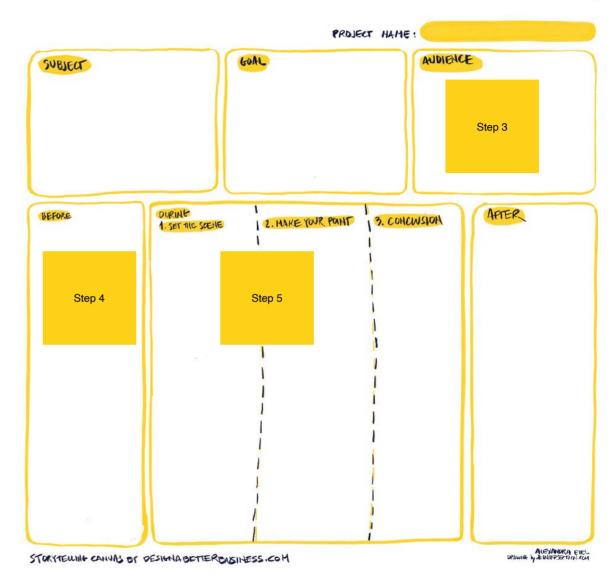

Image 25: Storytelling Canvas Step 3: Audience, Step 4: Before and Step 5: During

Where are you going to place them?

Step 6: After

Do audience members feel, think, know, want, etc., after they hear the story? Be specific!

Storytelling Checklist

- [ ] You have a clear idea of what the audience thinks and feel.
- [ ] You have prepared clear arguments to make your point
- [ ] You have one strong conclusion to end your story with.
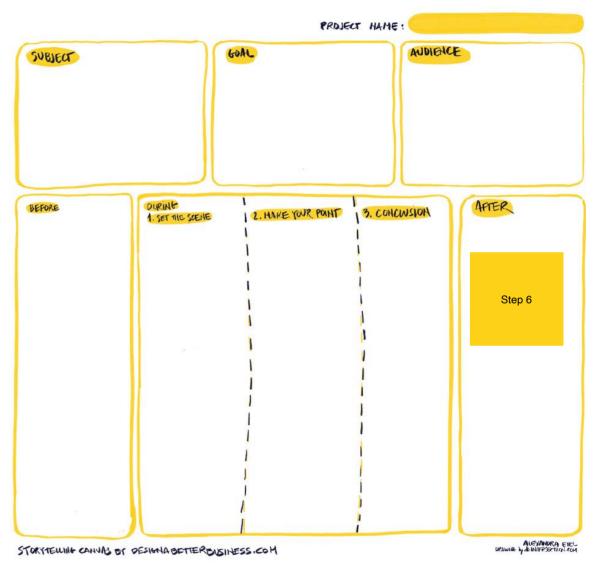- [ ] You know the possible booby traps you may encounter and have plan B. *(14)

Image 26: Storytelling Canvas Step 6: After.

14. Van Der Pijl P., Lokitz J., (2016). Design a Better Business: New Tools, Skills, and Mindset for Strategy and Innovation. John Wiley & Sons, Inc.

Key learnings

- When designing a story, there must be a goal. What do we want the audience to know, feel or do afterward? The goal needs to be quite selective: We can make only a few points in the story.
- The storytelling canvas is a template and visual tools that helps to take into account all storytelling parts into a one picture through design and innovation processes.

Image: courtesy of d+b Intersection

Image 27: Students presenting user' stories.

Conclusions

Storytelling gives that human touch to empathize and connect with users in order to understand, identify and map-out user needs through the user-centered design. It can be applied at different moments along the process with different methodologies and tools, depending on the design challenge and desired purpose.

Persona mapping activates storytelling by creating a user character in order to bring out possible real users' motivations related to a specific target market. Personas can be constructed as a group activity in workshops that facilitates constructive discussions by putting a specific segment in the center of the design process and bringing a specific context of use.

Customer Journey Mapping helps to collect stories that explain in a structured, detailed and emotional way, the circumstances and interactions users experienced through a specific journey. This key information brings opportunities to ideate new innovations.

Solution storyboarding is an economical way to share solutions prototype and in order to get falser users feedback on what works and what not for them.

Creating stories can be practiced along the design process and having a specific template helps to implement it easier and on a more practical level.

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