



Field Manual for

Rapid Innovation

Introductions



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Why rapid innovation?

Design thinking can feel heavy among the daily demands of the business

Common Pitfalls

- Challenge to sell innovation among resistance of existing business
- The perceived size of UX can stop work before it starts
- Reserved for the most strategic initiatives, often overlooked for smaller initiatives
- Short-cuts can lead to unclear direction for design, or rework in development



5 practical tactics to make innovation a viable part of your culture

Accomplish goals with minimal investment, to drive alignment and support across the enterprise

Methods

- Proto Personas
- Journey Mapping
- Sketching Exercise
- Drive-thru Research
- Guerrilla Research





Proto Personas



Proto Personas

Characterize your WHO

Quickly document your best guess to narrow your focus

Based primarily on assumptions, a point of reference for your target user's behaviors, goals, needs and other characterizations to help make thoughtful decisions

Value

- Humanizing
- Shared vision
- Snowball effect
- High speed to execution





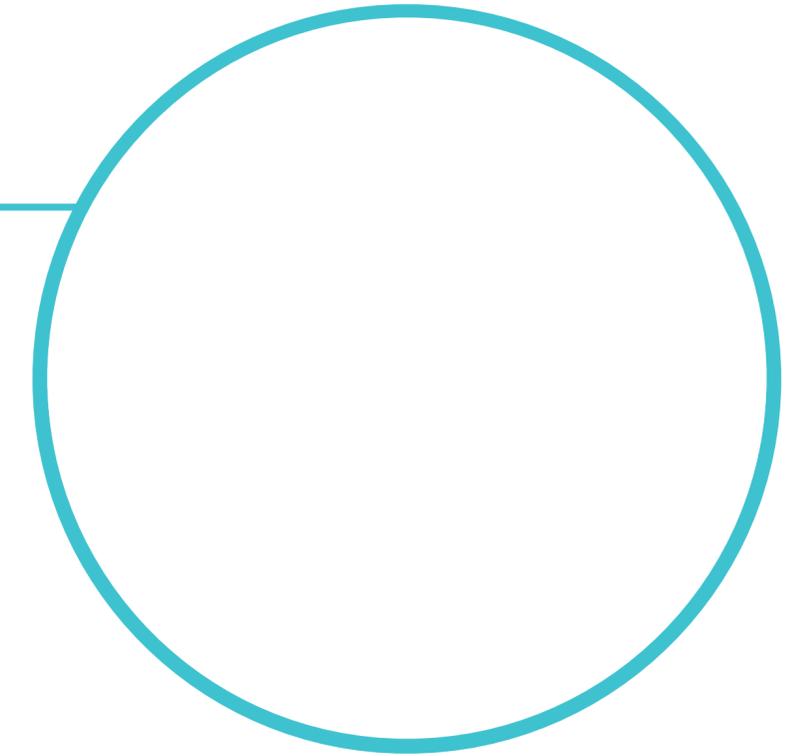
Proto Personas

Bio & Demographics

Behaviors

Stories & Scenarios

Goals & Needs



Name

Tag Line

Personal Quote





Olivia Osbourne

Second-time home buyer

Profession: Marketing Manager, AT&T
Location: Arlington, TX
Age: 32
Home life: Married to Miguel (Engineer);
 1 child, another on the way
Hobbies: Cross-fit; surfing
Favorite TV shows: The Good Wife; This Is Us
Personality: #outgoing #friendly #detail-oriented

**I really wanted to take this process into my own hands.
 But I couldn't waste time touring homes that didn't fit my needs.**



Real estate info

Current home: Starter home
Household income: \$170,000
Savings: \$50,000
Credit: Good
Purchase timeframe: 1-3 months
Real estate knowledge: Low

User goals

Olivia comes to the site to...

- Get to know as much about a home as possible before touring it.
- Find a home near Dallas with strong school district
- Find out what their monthly cost could be
- Get pre-approved easily
- Autonomy; rely as little as possible on a real estate agent

Business objectives

We want Olivia to...

- Register for email alerts for new and upcoming Bungalo homes
- Set up on-demand tours
- Favorite and share homes
- View home documents and history
- Apply for pre-approval

Bio

Olivia and her husband Miguel currently live in a two-bedroom starter house in a neighborhood just outside of Dallas.

Olivia had a poor experience with her previous agent, and has very little understanding of the home-buying process. She has an idea about what she wants: newer home, closer to the city, 3+ bedrooms, open space concept for living room and kitchen. More importantly, the home needs to be new or recently remodeled. In other words, we do not want to go through the hassle or uncertainty of dealing with costly home repairs.

Motivation



Favorite brands



WARBY PARKER





Proto Personas

Quickly identify your target audience

Identify key user **types**, their needs, **goals**, and common **behaviors**

Tactics

- Leverage existing research, and analytics
- Interview & include stakeholders
- Analyze competitive landscape
- Determine and rank key attributes
- Personify and make memorable





Journey Mapping



Journey Mapping

Break down your user's feelings across a process

Hone in on the deepest pain and prioritize areas for innovation

Identifying areas that resonate well, where users run into challenges, and potential areas of opportunity can lead to market-differentiating features.

Value

- Alignment
- Shared vision
- Data-driven decisions
- Quick insights





Journey Mapping

Persona

Scenario

Goals & Expectations

Stage 1

Stage 2

Activities

Feeling



Opportunities





Journey Map

Buying a home

Frustration

Delight

Current process

Considerations

Two groups:
1) autonomy - "I don't want to rely on/ pay for an agent. Is my agent acting in my best interest?"
2) _____ - "Let my agent handle everything. I just want to pick a home and purchase it."

Buyers do not have allegiance to one site - will look at multiple to find homes. Homes are often listed on many sites, along with the MLS. Many other buyers are looking at the same homes.

Buyers often have 1 or more people they confide in before buying.

Buyers don't want to waste their limited time viewing homes that don't match their criteria.

Buyers are uneducated or not interested in this part of the process. Need to simplify / automate.

Get preapproved

Finding an agent

Finding a home

Sharing a home

Home tours

Finding title company

Visit a personal lender or apply online

Use current agent or find via friends/ online/ visiting agency

Finding, comparing, and favoriting homes on sites like MLS, Zillow, Real Estate, Trulia, Realtor, etc.

Sharing a home with friends, loved ones, multiple stakeholders via email or social by copying and pasting links.

Have agent schedule a tour with home-owner that fits into buyer's schedule - usually on days off; open houses on weekends.

Some users may opt to have their own title company. At times agents can recommend title companies.

Faster approval, seamless integration to online system

Some find a home before they find an agent, agent is attached to home they like and thus acquire agent without vetting.

Agent tends to handle much of the process right now.

May want to have an option that doesn't impact some users current process (agent user type).

Many sites out there that do this well.

Features users find most helpful: monthly cost, affordability, lots of quality photos, map functions, school locations.

Filtering will be limited at launch due to limited inventory.

Agents may also want to share exclusive homes to their network or social page.

The more of a home the buyer can see beforehand, the more likely they are to visit a home they like.

Buyers are very busy; scheduling home tours between agent, seller, and buyer can be painful and time consuming.

Open houses can feel overwhelming or deter buyers from engaging more with home.

Title companies can vary based on state/ home.

Buyers aren't so educated on the process of choosing a title company.





Journey Mapping

Quickly dissect your customer's journey

Focus on feelings and behaviors in a single scenario

Tactics

- Plan ahead
- Focus on specific user, in a specific scenario
- Parking Lot ideas you'd like to revisit
- Leverage existing research
- Identify opportunities for improvements





Sketching Exercise



Sketching Exercise

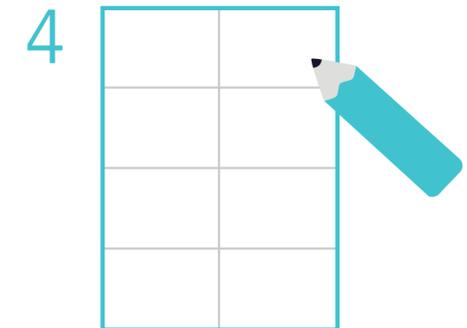
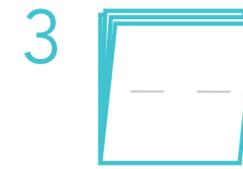
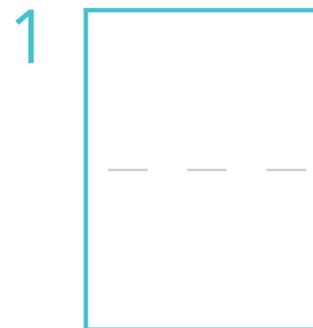
Crazy 8s is a great way to leap forward in ideation

Get past all the bad ideas to align on the best to test

Everyone can contribute to the creative process with simple exercises designed to generate a lot of ideas in a short amount of time.

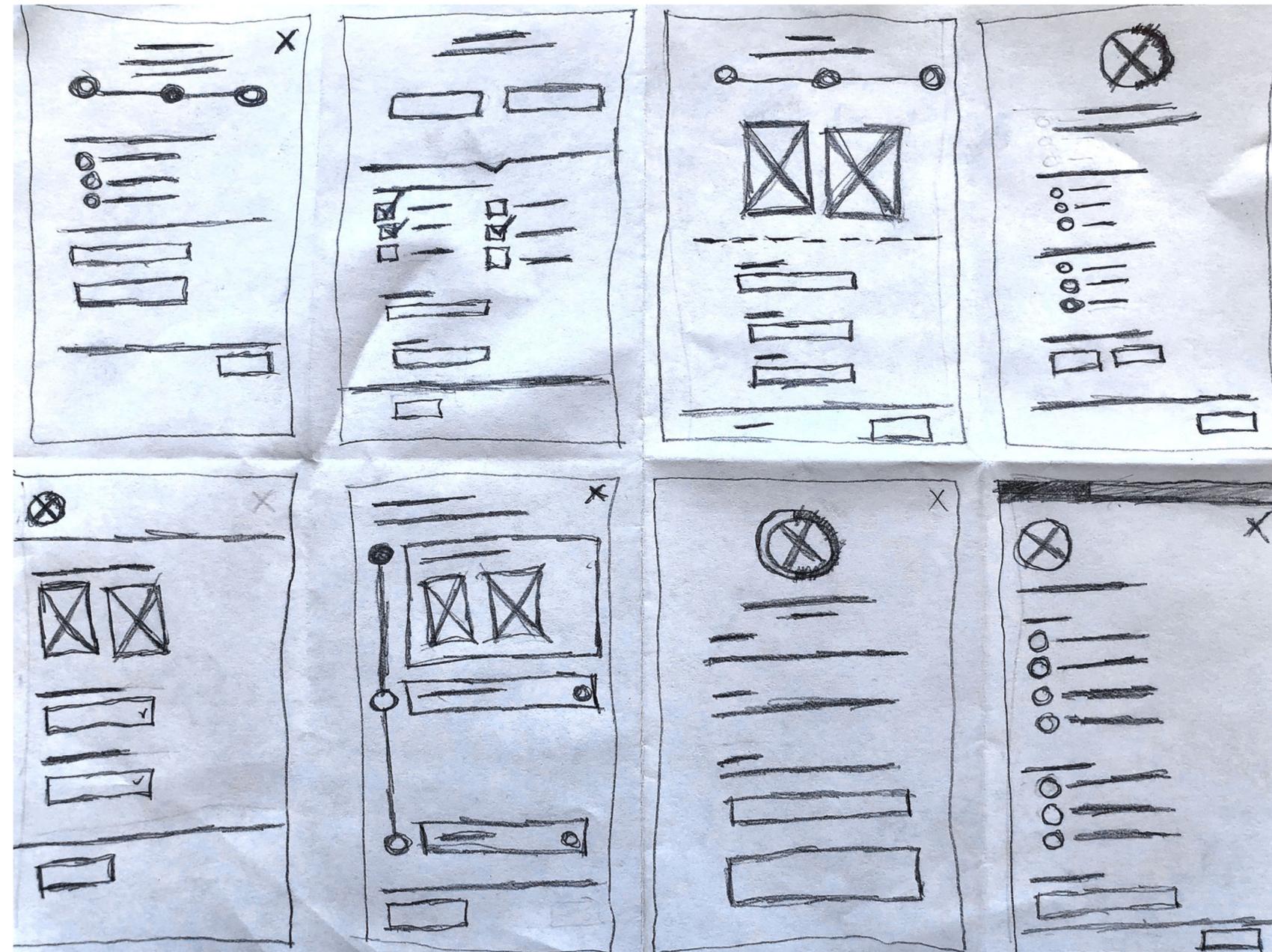
Value

- Time pressure
- Inclusive
- Collaborative
- Quantity over quality
- Borrow and improve



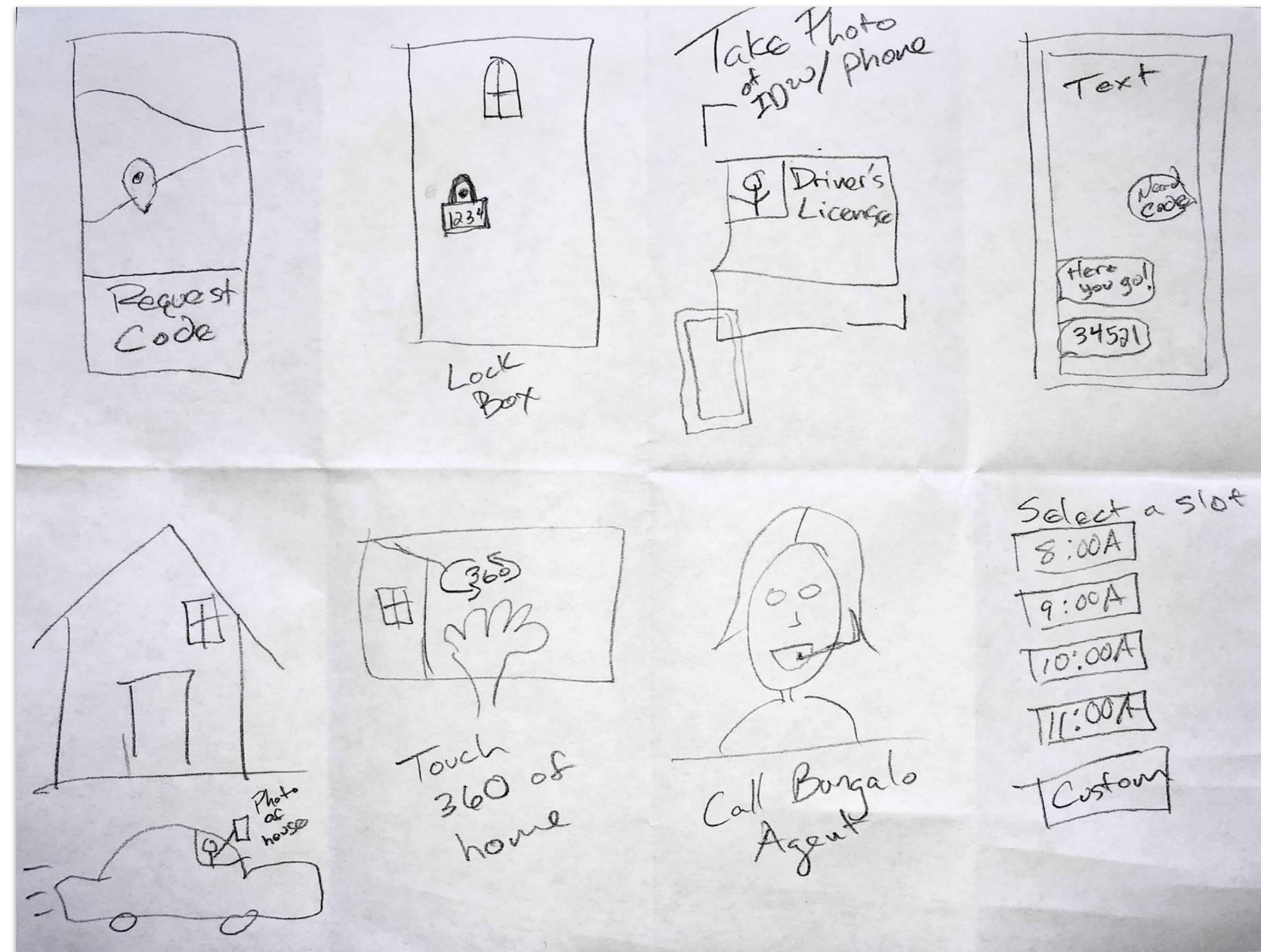


Sketching Exercise





Sketching Exercise





Sketching Exercise

Tactics to lead a successful sketching exercise

Everyone can produce visual ideas, even with stick figures

Tactics

- Setup and gather inspiration
- Keep it simple
- Diverge
- Converge





Drive-thru Research



Drive-thru Research

Convenience for them, insights for you

Empower more people to participate in research

Engage participants at their convenience, in a public space, over a period of time.

Value

- Participation
- Inclusive
- Quick insights
- Limits bias





Drive-thru Research





Drive-thru Research

How well can you read a map?



How are your survival skills?





Drive-thru Research

Engage participants on the go

Encourage engagement through flexibility and ease of use

Tactics

- Communicate
- Be opportunistic
- Design critique, concept validation, research insights
- Sky's the limit





Guerrilla Research



Guerrilla Research

Get outside and get some insights, guerrilla style

User research on the cheap and easy

A scrappy way to get quick feedback at any stage, and identify problems that could have cost the business considerably.

Value

- Low investment
- High speed to execution
- Easier to sell
- Slippery slope





Guerrilla Research

Research Goal

Key Questions

Target Personas





Guerrilla Research



bungalo How it works Mortgage About us More

Dallas 3+ bed, 2+ bath \$350k - \$450k More filters 12 Properties Save search

Search neighborhoods or zip codes in Dallas, Fort-Worth

Homes we own for sale in Dallas-Forth Worth

Property Status	Price	Est. Monthly Payment	Address	Sqft	Bed/Bath	Action
EXCLUSIVE	\$400k	est. \$1,889/mo	1234 Rectangle Park Dallas TX, 39200	2,850 sqft	3 bed, 2 bath	Schedule tour
COMING SOON	\$379k	est. \$2,103/mo	1234 Triangle Park Dallas TX, 39200	3,000 sqft	3 bed, 2 bath	Get notified
PENDING	\$390k	est. \$2,103/mo	1234 Rectangle Park Dallas TX, 39200	2,900 sqft	3 bed, 2 bath	Schedule tour
PENDING	\$379k	est. \$2,103/mo	1234 Triangle Park Dallas TX, 39200	2,650 sqft	3 bed, 2 bath	Schedule tour

Map showing property locations in Dallas and Fort Worth. Legend: Bungalow homes currently being renovated. Show Hide





Guerrilla Research

It's meant to be fast and dirty

The type of research you do and the place you do it can be flexible

Tactics

- Clarify your goals
- Pick a location
- Have an incentive
- Low fidelity is your friend
- Bring a buddy



Use your Field Guide to engage these tactics anytime

Encourage greater alignment and team cohesion

Methods

- Proto Personas - who & why
- Journey Mapping - steps to success
- Sketching Exercise - diverge and converge
- Drive-thru Research - open forum feedback
- Guerrilla Research - quick, targeted testing



Thank you

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