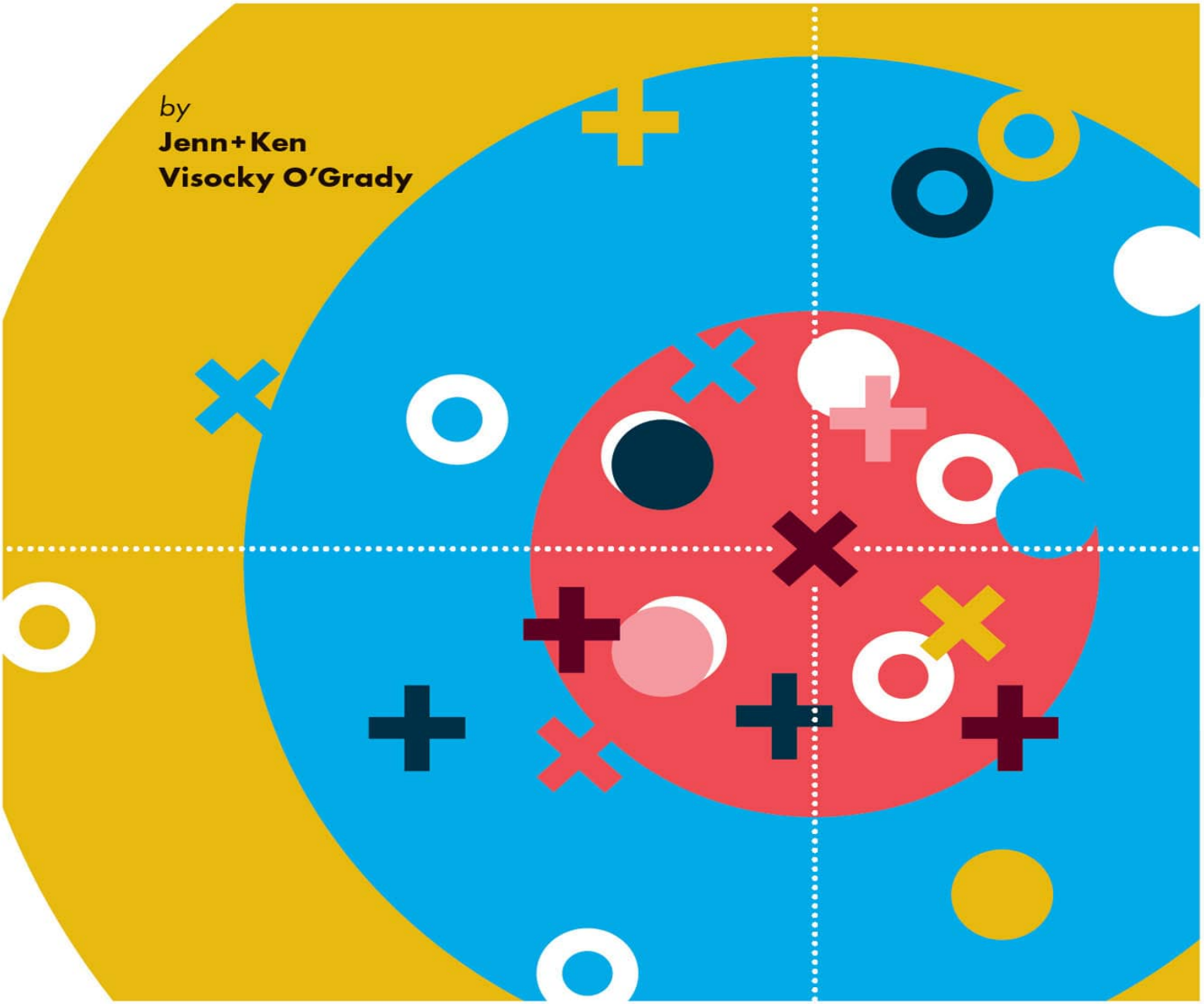
A Designer's Research Manual

Third Edition,
New + Updated!

SUCCEED IN DESIGN BY KNOWING YOUR CLIENTS + UNDERSTANDING WHAT THEY REALLY NEED

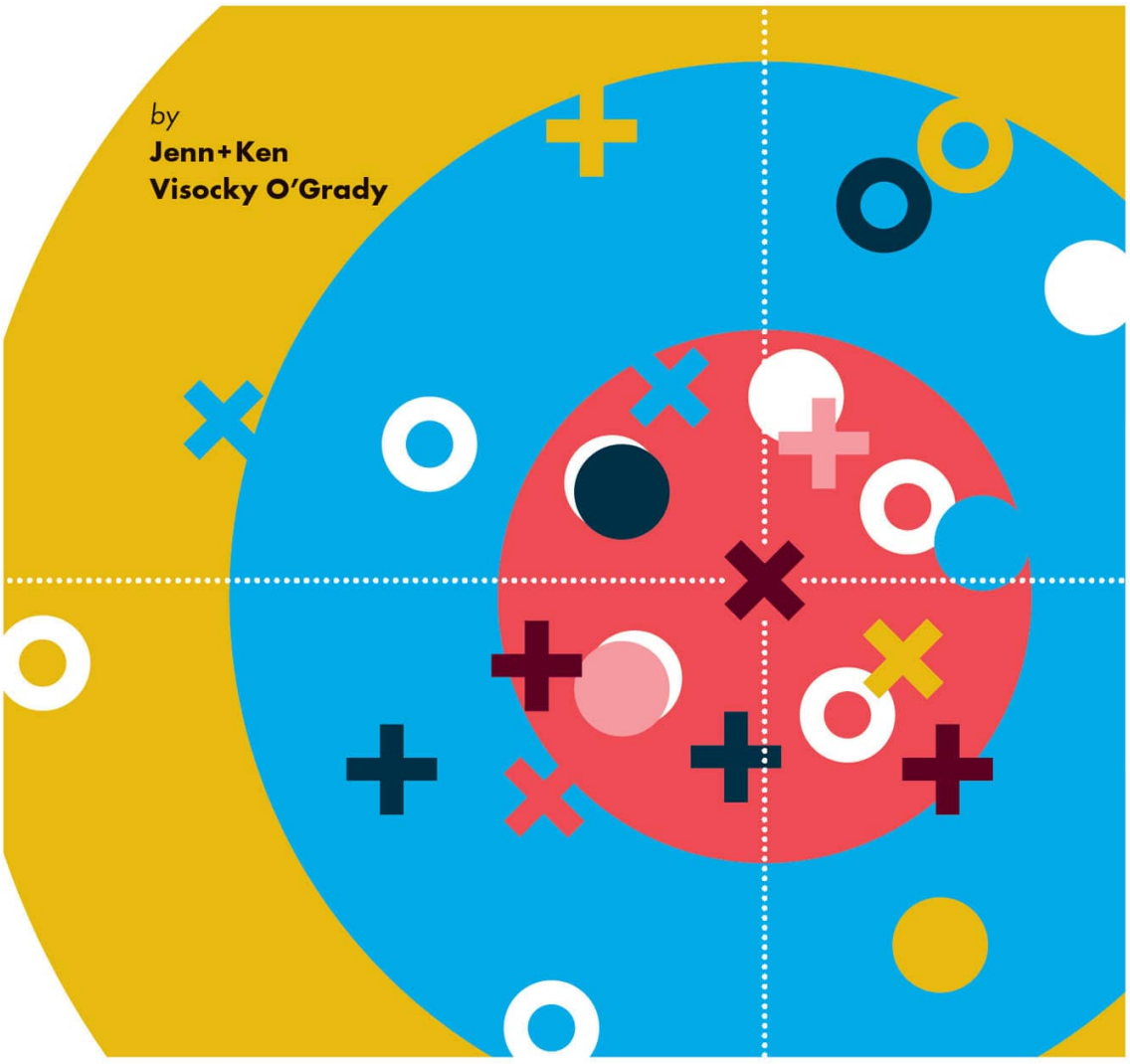
by
Jenn + Ken Visocky O'Grady



A Designer's Research Manual

Third Edition,
New + Updated!

SUCCEED IN DESIGN BY KNOWING YOUR CLIENTS + UNDERSTANDING WHAT THEY REALLY NEED



by
Jenn+Ken Visocky O'Grady

A Designer's
Research Manual

Third Edition,
New + Updated!

SUCCEED IN DESIGN BY KNOWING YOUR CLIENTS + UNDERSTANDING WHAT THEY REALLY NEED

by
Jenn + Ken
Visocky O'Grady



TABLE OF **CONTENTS**

Introduction: Why This Book?

How Do I Use This Book?

CHAPTER 1:
AN OVERVIEW OF RESEARCH IN GRAPHIC DESIGN

What Is Research-Driven Design?

What Research Can + Can't Do

What Is Person-First Design?

- Person-First Philosophies
- User-Centered Design
- Human-Centered Design
- *Expert Voice: Mike Bond*

Historical Perspectives

- Bauhaus Beginnings
- The Perfect Couple
- We've Been Watching You
- Don't Tell Me, Show Me

Emerging Opportunities in Design Research

- Experience Design (UX/UI)
- User Research + Research Operations
- Service Design
- Design Strategy
- Accessibility + Inclusive Design
- The Common Thread
- *Expert Voice: Rich Hollant*

Design Creates Value

- Design + Investment
- The Design Staircase

Quick Tips

CHAPTER 2:
RESEARCH STRATEGIES+TACTICS

Big Concepts in Research

- Quantitative + Qualitative Research
- Primary + Secondary Research
- Formative + Summative Research
- Basic + Applied Research

Triangulation

Strategy: Literature Review
- Tactic: Communication Audit
- Tactic: Competitor Profiling
- *Expert Voice: Justin Ahrens*

Strategy: Ethnographic Research
- Tactic: Contextual Inquiry
- Tactic: Observational Research
- Tactic: Photo Ethnography
- Tactic: Self Ethnography
- Tactic: Unstructured Interviews
- Tactic: Visual Anthropology

Strategy: Marketing Research
- Tactic: Demographics
- Tactic: Psychographics
- Tactic: Focus Groups
- Tactic: Surveys + Questionnaires

Strategy: User Experience
- Tactic: A/B Testing
- Tactic: Analytics
- Tactic: Card Sorting
- Tactic: Eye Tracking
- Tactic: Paper Prototyping
- Tactic: Personas
- *Expert Voice: Winston Wang*

Strategy: Visual Exploration
- Tactic: Color Psychology
- Tactic: Mood Boards
- Tactic: Sketching

Quick Tips

CHAPTER 3:
PRACTICING A RESEARCH-DRIVEN APPROACH

Managing the Design Process: You Need a Plan
Iterative Design
Design Council's Double Diamond Process
Information Literacy, The Big6™ + The Super3™
Research Planning
- KWHL Tables
- Logic Models

Research Analysis
- Sample Framework to Help Structure
- Sample Framework to Help Empathize

Research Summary Reports + Creative Briefs
- Research Summary Reports
- Creative Briefs
- *Expert Voice: Aradhana Goel+Sara Frisk*
- Cumulative Documentation

Quick Tips

CHAPTER 4:
PROJECT SPOTLIGHTS

Wonder What
Compass Youth Collaborative
Coinbase Localized Branding
Osgoode Professional Development
MSP Airport Wayfinding
Expert Voice: Penina Acayo Laker
Canandaigua National Bank
Plural Rebrand
The Max Collaborative
Soulmates Graphic Novel

Glossary of Terms
Bibliography
Additional Resources
Credits
Featured Practitioners

Index
About the Authors

INTRODUCTION

WHY THIS BOOK?

If you're working for a publicly traded design megalith whose creative staff is assisted by historians, anthropologists, sociologists, and marketers, you probably don't need this book.

If you're one of the thousands of graphic designers whose education was based primarily in the art department, if almost all of your clients have MBAs, and if you've wished for some help validating your aesthetic decisions to that crowd, keep reading.

Consider this manual a primer on research methods and their practical application to graphic design. It broadly outlines common research strategies and tactics and introduces you to frameworks in which to engage them. It offers suggestions for incorporating research-driven design into your creative process — whether you're a freelancer, in-house designer, member of a studio team, student, or professor. It features success stories and examples of these methods in action: accessible and pragmatic accounts of real-world experiences from designers around the globe.

Writing this book (now for a third time) has influenced the way we approach design, and the way we teach our students. It is our firm belief that in a profession in flux, a good generalist can always find stability. You need this information for your good generalist shelf. Know when to use it and when to call in the experts. So armed, go make good stuff.



Jennifer Visocky O'Grady
Professor + Associate Dean
Cleveland State University



Kenneth Visocky O'Grady
Professor
Kent State University

HOW DO I **USE THIS BOOK?**

We know you're busy. So we've packaged this content assuming that you'll visit (and revisit) this book with limited chunks of time, and specific tasks in mind. It's divvied up into four distinct sections:

1. Know the Basics

Before you can integrate research into your design process, you need a little background. This section provides some historical context, showcasing applied research practices from as far back as the Bauhaus (see, art school was on to something). We'll also discuss how design creates value, helping you articulate why research-driven design methods serve your clients' interests.

2. Gather the Tools to Conduct Research

This section reviews research basics, so you understand the difference between primary and secondary investigations, and qualitative and quantitative methods before jumping into specifics. We'll survey a variety of research strategies, drilling down to tactics that you can employ on your projects, describing what these tools can (and sometimes can't) do, how and when they are used, and the level of difficulty or expertise involved.

3. Integrate Research into Your Existing Practice

So many tools and techniques to choose from. Where to begin? What research methods are a good fit for your team or project? This section provides exercises to help you get started, and methods for crafting research plans that account for resources and manage scope.

Need advice on how to turn research findings into creative gold? We'll also outline frameworks that help analyze the results of your

efforts, helping you craft a research-driven creative brief and identify new opportunities for design.

---

4. Learn from the Experts

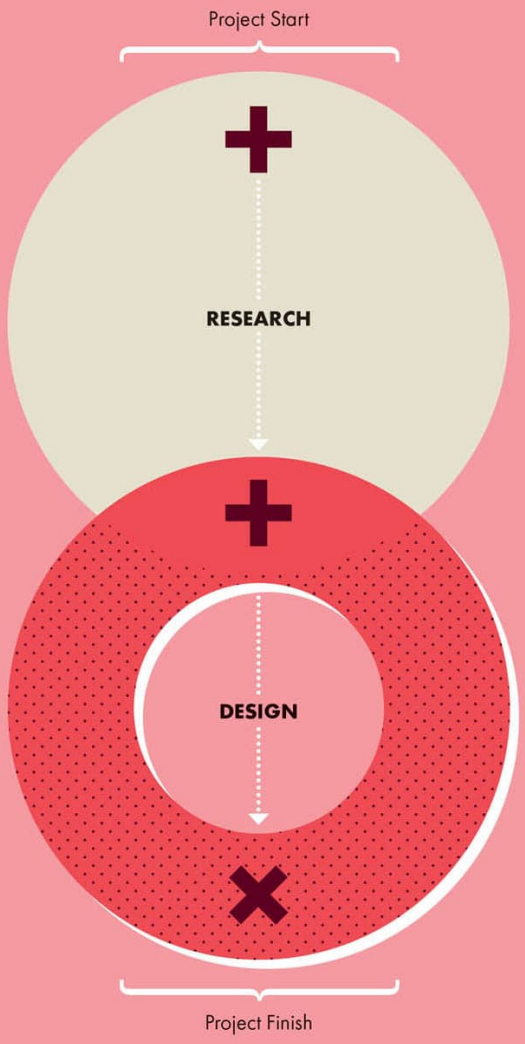
We've peppered the book with real world examples. This section features case studies from designers and organizations demonstrating how research drives creative decisions. Their individual practices are diverse in scale, project focus, and budget — but each shares a practical application of research that has resulted in creative dividends. Want to see research-driven design principles in action? This is where to turn.

What's Different in the Revised Edition?

The first edition of *A Designer's Research Manual* was released over twenty years ago! Much has changed in the design research space since, but the core principles remain the same. So we've kept the evergreen content from the original editions, updating it with new strategies, tactics, processes, and tools to reflect current trends.

Two decades of working with designers who've adopted and adapted these methods has helped us understand where sticking points commonly occur. This third edition was written with process in mind, adding information to help you get started, plan your research strategy, analyze results — and incorporate them into a solid, action-oriented creative brief.

More content = you making more good stuff.



Getting started is the hardest part. We provide tools and tactics that help you hit the ground running, plan your research approach, account for project scope, and manage your creative process.

Once you've done the research, how do you make sense of the data? We provide frameworks to help you discover patterns in the information you've gathered — and identify opportunities for design.

CHAPTER 1

AN OVERVIEW OF RESEARCH IN GRAPHIC DESIGN

Businesses recognize, now more than ever, how important design is to financial success. However, clients are often looking for assurances that their communication dollars will be spent wisely.

WHAT IS **RESEARCH-DRIVEN** DESIGN?

This chapter explores the concept of research-driven design, how it has been used in the past, where new opportunities exist, and how these practices generate value.

Graphic designers have long been taught that form, structure, and style are indispensable communication tools. Hours spent in the study of typographic principles, color theory, grid placement, shape relationships, and visual contrasts inform a designer's aesthetic decisions. However, the demands placed on today's visual communication designer are very different from those asked of previous generations. As the design profession evolves, an increasingly competitive global marketplace expects measurable results from design work. Clients want assurance that designers understand their business issues and that commissioned work will deliver a return on their investment.

Incorporating research methods into the design process can aid in meeting this demand for a variety of reasons. Simply put, this approach redefines the designer/client relationship — and multiplies the creative and financial dividends for both. Research-driven design can help define an audience, support a concept, advocate for an aesthetic, or measure the effectiveness of a campaign. In a field dominated by subjectivity, tools such as market research, ethnographic study, and data analytics can be used to communicate better with a target audience, create more effective messages, or continually assess a project's development. Applying traditional research methodology to the process of graphic design also positions the designer in a consultative role. Armed with this supporting evidence, the designer (often viewed as a vendor) instead becomes a strategic consultant (newly viewed as a business partner). Designers who focus primarily on deliverables often work project-to-

project, while those who provide strategic insight build ongoing relationships and sustained engagement.

In chapter one we'll introduce person-first design philosophies, exploring the importance of truly understanding the unique needs of the people for whom you're designing. We'll review some historical moments that helped define the role of research in design practice, because examining how the aligned fields of architecture, interior design, industrial design, and user experience design have successfully embraced research can help you learn how to apply the concepts to graphic design. We'll end on some good news you can help spread, evidence of design's connection to value generation and financial success.

WHAT RESEARCH CAN **+ CAN'T DO**

Research is essential to solving complicated problems. This is true in almost every profession; it's even true in complex personal undertakings! Whether you're charged with expanding your company into a new market, or selecting your next car, you can't solve the problem if you don't do your homework.

Research frames the problem. It provides context. It helps us get to know the people we're designing for, and the issues we're designing around: Who lives in this market? What distracts a new driver? We research to identify and understand needs, preferences, influences, motivations, habits. We're looking for patterns. We're seeking insight that will help us connect project goals to people. The extra work is worth doing because it places your user at the center of your design process. Research findings become a touchstone for ensuring that creative and aesthetic decisions are being made objectively. You're lining up the work to resonate with your audience.

Research can also serve internally as a client communication tool. It can provide a platform for the client and designer to agree on project goals, scope, and audience. Findings can help outline concepts and support rationale with stakeholders and partners. Actively incorporating research into the design process makes the creative problem more transparent, helps win buy-in, and mitigates perceptions of risk.

Research can help provide focus, track progress, confirm success, measure impact . . . and sometimes it can tell you that you've missed your mark.

Research isn't a guarantee. It's important to understand that the practices covered in this book don't automatically ensure success. While design research can be very technical and in-depth, it's still

primarily a qualitative — or subjective — activity. As designers, we undertake these activities to develop insights into problem and audience. We are not building evidence for a legal argument, there is no warranty on outcome, we do not seek definitive proof. Research cannot guarantee — but it can predict and influence a project's success. Ask the right questions, talk to the right constituents, and you will develop an understanding of central issues, a new empathy for the people you're trying to reach.

Research doesn't prescribe aesthetic. Creative decisions can be inspired by research findings — the creative process almost always benefits from more information — but research activities can't create the work. Informed decisions — based on research instead of an intuitive best guess — amplify the power of the artifacts they create. It's up to the design team to incorporate the analytical to the benefit of their art.

WHAT IS **PERSON-FIRST** DESIGN?

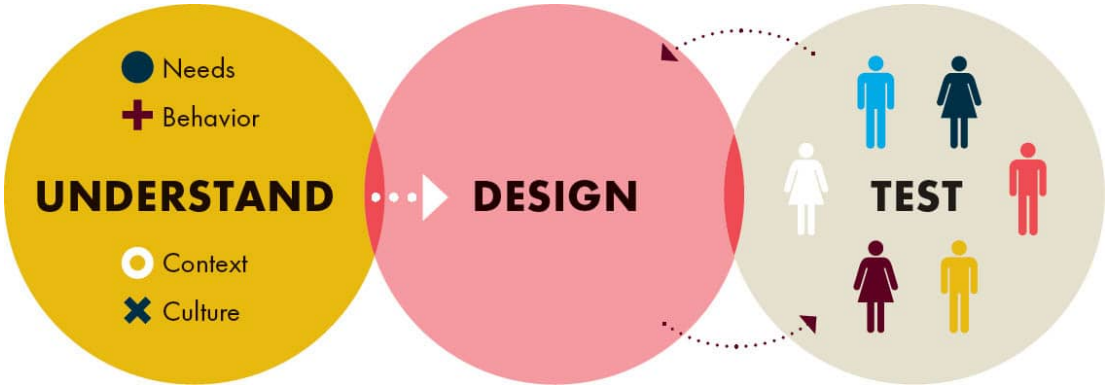
One of the first things we teach new designers is 'It's not about you.'

Looming deadlines can easily pressure us to jump into solving a problem visually, based on personal inferences. Undertaking a person-first approach forces the creative to slow down and invest time stepping out of his or her own experience and into another's perspective. We can craft more meaningful, targeted, resonant communications when we develop an empathy for our audience — placing those people at the center of the creative process. Embracing a research-driven design strategy means more work upfront, focused on developing a better understanding of the client and the needs of the end user. But that initial investment of time will pay dividends through the course of project development and well after launch.

Here are some ways that a person-first approach benefits all involved, client, customer and creative:

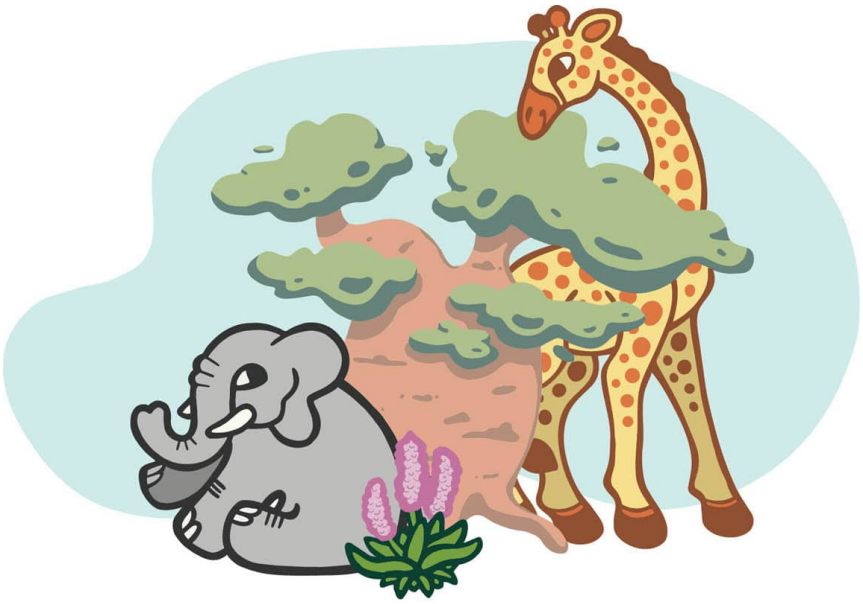
- Research findings and participant feedback allow for deeper comprehension of the problem and yield more tailored solutions.
- Creative and client can establish appropriate project success metrics together, based on research findings.
- Audience participation and iterative process can raise questions, provoke solutions, and identify new opportunities.
- The creative team has a better understanding of context including environmental factors that may influence use before they start designing.
- Validation and testing of concepts happens during prototyping, avoiding costly assumptions and post production mistakes.
- Person-first approaches have been linked with higher rates of customer satisfaction, increased time to market, and greater return on investment.

PERSON-FIRST DESIGN



A person-first approach employs research to help creative teams understand the needs, behaviors, and culture of their audience, and provide context for how they will encounter or interact with the artifact being created. Design solutions are then tested and refined with real users.

▶ Description







Graduate students at Kent State University's School of Visual Communication Design used human-centered research to develop wall murals for a children's hospital in Malawi. By understanding what helps young patients feel safe and comfortable in medical environments, they created environmental graphics with culturally relevant imagery that transforms clinical spaces into welcoming, reassuring environments.

Person-First Philosophies

A number of terms are used when discussing person-first approaches to design. It's helpful to parse them into two big ideas, *User-Centered Design* and *Human-Centered Design*.

User-Centered Design

The term "user-centered" has its origins in product design, human/computer interaction, and software development but has since expanded in practice to include a broad range of design disciplines — anywhere a deep understanding of end users is essential to project success. This concept integrates research throughout the creative process, providing valuable insight into the needs, behaviors, and expectations of the target audience. User-centered design is a person-first approach focused on increasing the end user's satisfaction with a product or service, experience or brand. This approach can be applied to the development of any design system, from interactive to print, packaging to environmental, single artifact to broad campaign. It is often applied to commercial endeavors but can also be a guiding principle of socially driven projects. User-centered design targets a specific audience and seeks to develop a project that serves their needs.

Human-Centered Design

Human-centered design incorporates many of the same approaches as user-centered design, with deep research into behavior and an iterative process, but this concept attempts to address the needs of every individual, regardless of ability, age, education, or cultural background. Human-centered design veers away from the specificity of a user-centered focus, avoiding audience segmentation, and intent on creating design artifacts and systems that serve everyone. The terms "design for all" and "universal design" are often used interchangeably when discussing human-centered design.

If embracing user-centered design is a good business decision, many argue that there is a moral and ethical imperative to embrace human-centered design on certain projects, with principles of accessibility and access emphasized over aesthetics or economics.

Ultimately both person-first philosophies guide designers to address the needs of the individuals they're designing for: It's the scale of that group that differs.

EXPERT **VOICE**



Mike Bond
Founding Partner, Bond & Coyne
Founder, WonderWhat Inc.

THE HUMANITY OF RESEARCH

We must feel and experience as much as we synthesize and analyze.

Designers need to care about what they are doing. We need to protect the depth and empathy in our work — the kind of depth that is possible when we make our research and development processes human. Great design is human design, after all.

Information (and misinformation, if we are honest) is truly everywhere now. "Answers" are now everywhere too. We all — designers, non-designers and clients — have easy access to myriad sources of almost every kind of information. With this comes an expectation of speed, efficiency, and maybe the question "Why do I need a designer in the mix at all?"

Considering how we, as designers, build research into our work is, in part, about demonstrating the value and humanity that we bring. We must be strategic with how we highlight research within what we do and also be creative with how we carry it out and involve others.

To begin with, we must define the what, why, and when of research within our projects. Then we should consider how, as people, we interact with it and the relationship we have with the technological options available to us.

We can consider the role of research and research processes within our work through 4 lenses: *understanding, synthesis, possibility, development*.

First and foremost, research is about *understanding*, understanding via access to information and experiences.

It is then about *synthesis*, where we analyze and dissect our findings — noting the logical, illogical, and surprising — and begin structuring responses.

Possibility is not the point at which research ends and designing begins. They coexist here. It is where we are imagining and designing the way forward — openly and together.

This continues through *development*, when we stress test our thinking, try to break our assumptions, and seek better solutions through failure as well as success.

Performing research as people, in real life, together, means we can gather information, yes. But also we get to hear — and I mean REALLY listen to — and witness, in real time. . .

- Personal viewpoints
- Actual experiences
- Throwaway comments (not the edited, selected comments)
- Thoughtless acts
- Penny drop moments
- Things that data cannot see
- Experiences digital cannot feel
- The serendipity and joy of interactions
- The disappointment of near misses
- Views of the unheard

We must feel and experience as much as we must synthesize and analyze. And audiences must feel heard. These real, human things are the invaluable golden nuggets that inform our creative process.

Research and insight are flooding more and more into the creative process itself.

We learn. We move, change, and adapt. Then learn again.

Research is in the act of doing. It is where the magic happens, where the buy-in happens, where the realization happens. Arguably most importantly, it is where the relationships are built that are necessary for design to succeed.

We must preserve this space, now more than ever. Bring insight into the reality of designing. And do it alongside machines, not giving way to machines.

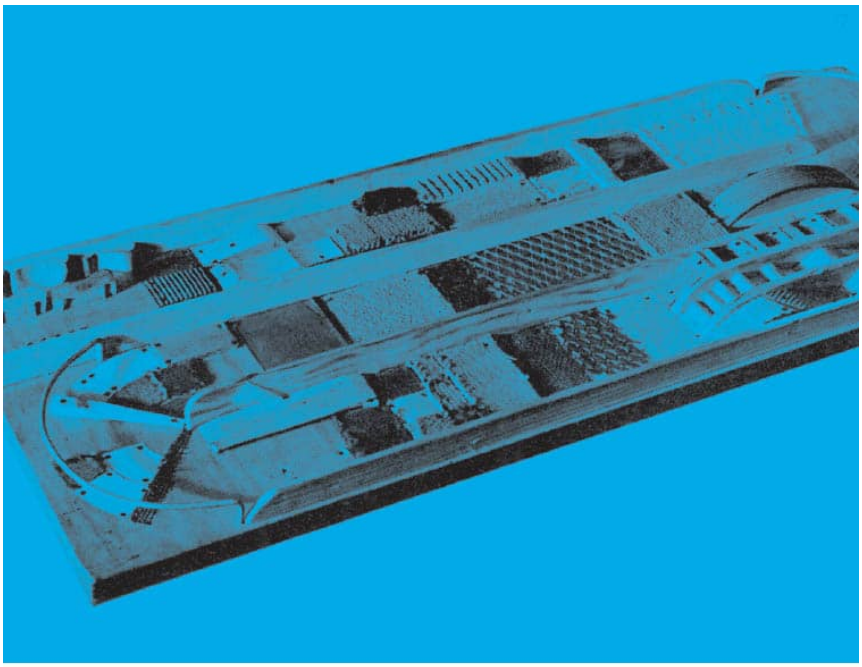
Technology is limitless. Imagination and our propensity to learn has always been limitless. We must treat these two worlds as liquid and blend them.

HISTORICAL
PERSPECTIVES

While the concept of research-driven design may seem to be a new trend, many practitioners throughout history have incorporated research methods into their design processes.

Bauhaus Beginnings

In his book *The New Vision: Fundamentals of Bauhaus Design, Painting, Sculpture, and Architecture*, László Moholy-Nagy describes a tactile design problem assigned to second-semester students at the Bauhaus (Germany, 1919–'33) and the New Bauhaus (Chicago, 1937), where completed projects were user tested on the blind.[1] Students were asked to assemble different tactile values or "tones" in a manner that would create meaning or showcase the relationship between swatches. For example, a student might create a value scale by placing a smooth surface such as leather at one end and a rough material such as sandpaper at the other, with graduated steps in between. Projects were then user tested by the blind, and testers' comments and experiences informed further investigations.





In his book, **The New Vision**, *László Moholy-Nagy recounts the process of New Bauhaus user testing tactile exercises on the blind*.

Examples

Tactile experiments may be suggested or self-imposed. Examples:

1. A two-row tactile table, running from one extreme to the other, it being possible to touch both rows simultaneously (from hard to soft, smooth to rough, wet to dry).

2. A two-row tactile table (tactile strip) with adjacent contrasting tactile values, arranged rhythmically (Fig. 5).

3. A four-row tactile table, free arrangement (Fig. 6).

4. Free table (Fig. 7).

5. A table for vibration and pressure sensations (Figs. 8 — 15).

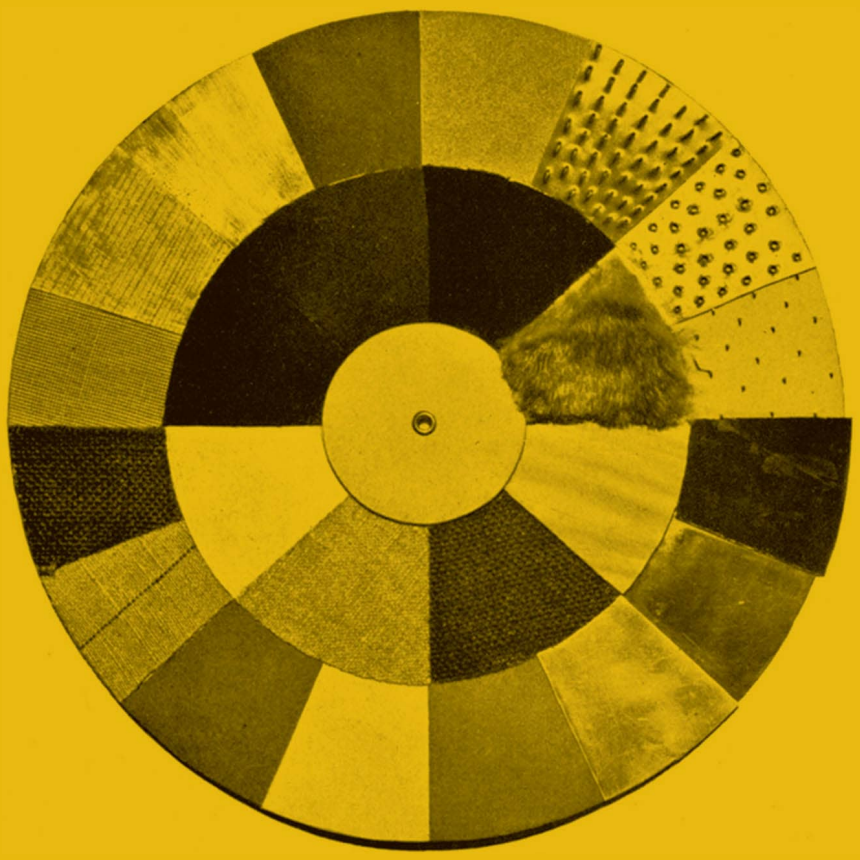
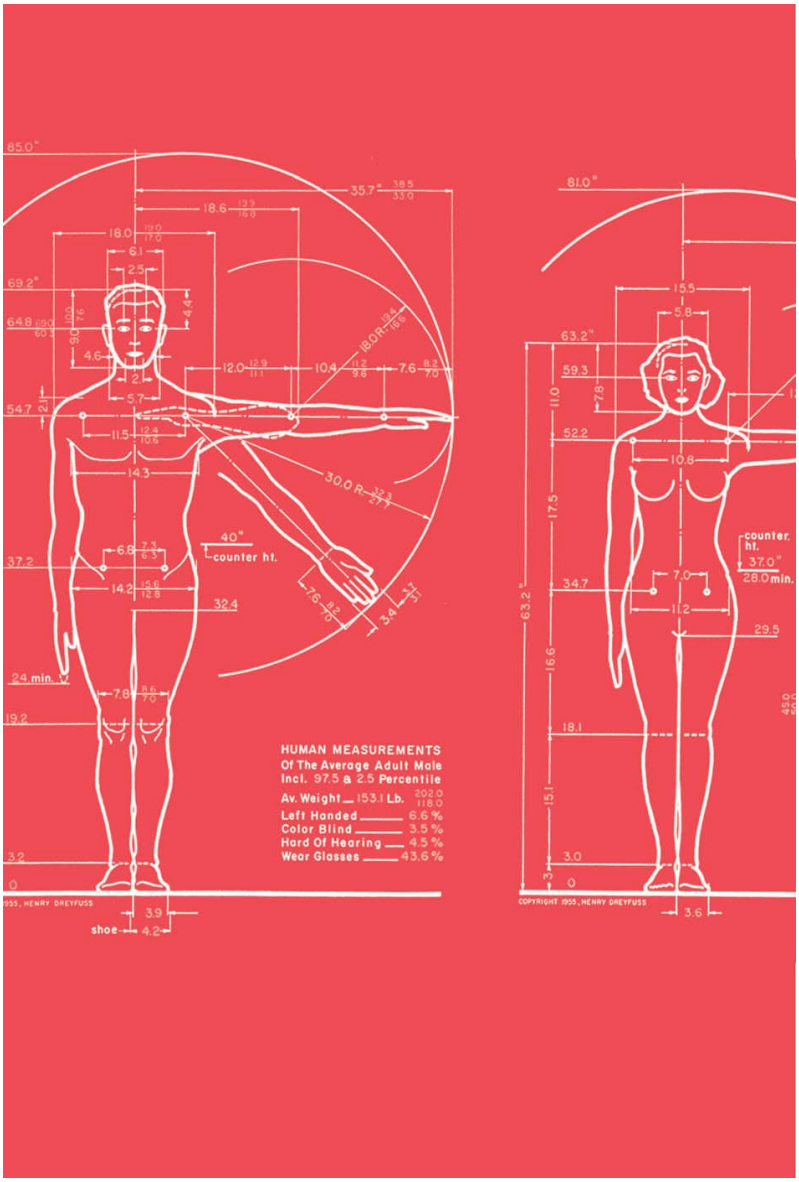


Fig. 5. Walter Kaminski (Bauhaus, second semester, 1927)
Revolving tactile table of two concentric circles with contrasting tactile values, from soft to hard, from smooth to rough.



To help guide design projects, Henry Dreyfuss personalized anatomical drawings such as these. They helped his studio to better understand the qualitative needs of end users, beyond simple anatomical factors.

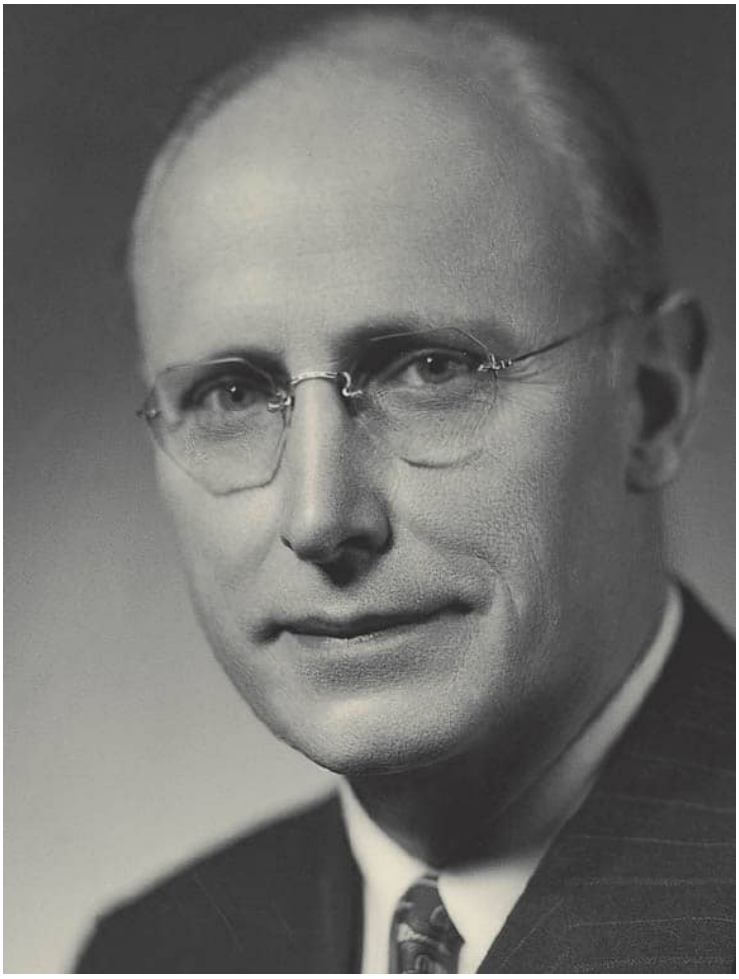
▶ Description

The Perfect Couple

Industrial designer Henry Dreyfuss dedicates an entire chapter to Joe and Josephine in his groundbreaking book *Designing for People*, first published in 1955.[2] The fictional couple originally appeared on the walls of Dreyfuss' studio as anatomical drawings of average men and women and were used to gain an understanding of human factors in product design. Dreyfuss explains that through the years Joe and Josephine developed "numerous allergies, inhibitions, and obsessions . . . disturbed by glaring light and by offensive coloring; they are sensitive to noise, and they shrink from a disagreeable odor." Beyond their original purpose as physical references, these insights into the feelings and needs of Joe and Josephine — user icons — gave the studio more information on which to base design decisions. This knowledge was used in the creation of everything from bicycles to tractor controls to the interiors of airplanes.

We've Been Watching You

The study of marketing research was pioneered by Arthur C. Nielsen Sr., founder of the ACNielsen company, in the late 1920s. Probably most famous for television's Nielsen ratings, Nielsen developed many innovative tools that provided clients with objective information about the effects of marketing. Using random sampling techniques, Nielsen was also able to quantify market share, making it a key indicator of financial performance. In 1939 the company expanded its operations to the U.K., with western Europe following shortly thereafter. Today they have offices across the globe, from Azerbaijan to the Ukraine, and are recognized as a world leader in consumer research.[3]



Most famous for television ratings, A.C. Nielsen pioneered marketing research in the 1920s.

Don't Tell Me, Show Me

Most of us think of computers as something that revolutionized the last decades of the 20th century, but early computing was underway before World War II. Since the introduction of these machines, people have been looking for betters ways to interact with them.

In early configurations, computers were complex and cumbersome tools, used primarily by scientific, engineering, and military communities. The machines themselves were huge, and programmers dictated functions through physical punch cards. As advancements were made in scale and availability, command line interfaces streamlined the programming process, allowing for commands to be typed directly through a keyboard. Still, entering these lines of code required an understanding of programming languages alien to the uninitiated.

The digital world we experience today — touch screens at mass transit platforms and interactive devices in the hands of toddlers — would not have been possible if not for the practical application of a graphical user interface (GUI, sometimes referred to as 'gooey'). GUI interfaces bring computer interaction to the masses, providing simple visualizations and easy analogy with the physical world.

One of the first interfaces of this kind was developed in the early 1970s at Xerox's Palo Alto Research Center (or PARC) for the experimental Alto computer. The team at Xerox knew that several factors were critical to widespread consumer adoption of personal computers, including availability and price. But the most crucial element was creating an interface that people actually understood.

Design was the key.

And to get the design right, the team at Xerox PARC knew that they had to create a system that reflected the world of regular people. They spent years engaging in user research, employing an iterative

process of prototyping and testing that allowed for the creation of design standards that still feel relevant decades later.



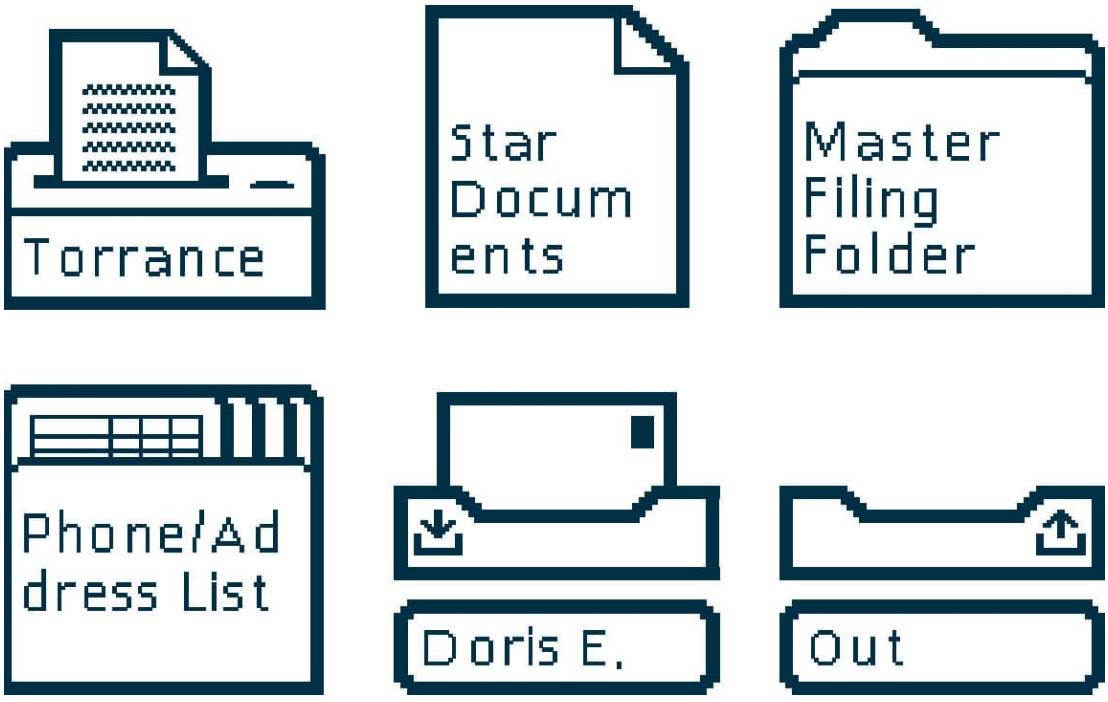
This vintage marketing photo from Xerox shows a 8010 Star Information System, the first publicly available personal computer using a graphical user interface (GUI), desktop metaphor, and mouse. These simple user experience innovations revolutionized human computer interaction and set a design precedent still resonant today.

Alto, the in-house prototype, paved the way for the Xerox 8010 Star Information System,[4] the first publicly available personal computer using a graphical user interface, desktop metaphor, and mouse. Xerox PARC's user-centered approach resulted in an icon-based operating system for the machine. People using the computer would

see a picture of a desk, open a folder, and physically move a file to another location — the screen, instead of blinking code, would function in familiar visual contexts. The Star system was even capable of networking, allowing for an early form of email, represented by simple icons of in and out boxes.

As ubiquitous as electricity and running water to today's digital natives, this simple visual metaphor was a revolution in its time. One that continues to influence our interactions with technology.

Many frame the rise of personal computers as a story of engineering, but the technology is only half of the narrative. Without the value created by this early user-centered design approach, public acceptance of personal computers might have been an uphill struggle. The graphical user interface was a cornerstone of the Apple Lisa and Microsoft Windows, and the foundation for every laptop, smartphone, and tablet since — a communication innovation that has become a default for integrating technology into everyday life.



Xerox 8010 desktop icons underwent user testing to determine if they would reflect commonly understood actions: a piece of paper representing an electronic document, an illustration of a folder as a place to store electronic documents, just like a real desk. These visualizations became analogies, shorthand for a transitioning digital workforce.

EMERGING OPPORTUNITIES IN DESIGN RESEARCH

Design is an evolving and dynamic field where change is constant. As design has matured as a discipline, research has moved from a specialized skill to a core competency.

Designers today work on complex challenges — from business innovation to social impact — that require deep understanding of human behavior, cultural context, and systems thinking.

The ability to conduct research and integrate findings into design work has become as fundamental as visual craft. If you're interested in research-driven design practice, here are established career paths where research skills are essential.

Experience Design (UX/UI)

Organizations need designers who can create useful, usable, and engaging interactions across digital and physical touchpoints. Experience designers combine user research, design thinking, and technical understanding to craft interfaces and services that meet real needs. This work requires empathy, systems thinking, and the ability to translate research insights into design decisions. Experience designers work across platforms — websites, apps, physical spaces, and emerging technologies — making research skills essential for understanding context and validating solutions.

User Research + Research Operations

User research has evolved into a distinct discipline with its own career paths. User researchers conduct qualitative and quantitative studies to understand behavior, needs, and motivations. They work closely with design and product teams to ensure decisions are grounded in evidence rather than assumption.

As research teams have grown, a new role has emerged: Research Operations (ResearchOps). ResearchOps professionals build the systems, tools, and processes that make research scalable and sustainable across organizations. They manage participant recruitment, research repositories, and ethical compliance, allowing researchers to focus on insight generation rather than logistics.

Service Design

Service design takes a systems-level view, examining how organizations deliver value across multiple touchpoints and over time. Service designers map customer journeys, identify pain points, and redesign experiences that span digital interfaces, physical environments, and human interactions. This work requires research methods that capture experience over time — diary studies, journey mapping, and stakeholder interviews.

Design Strategy

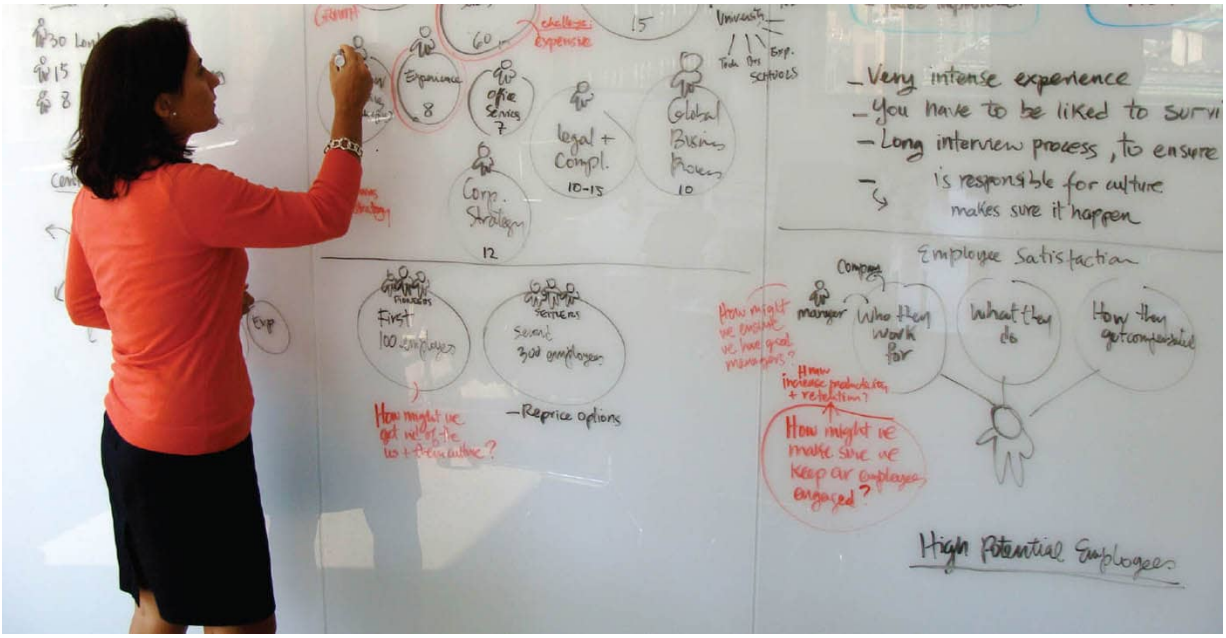
Design strategists combine research, business acumen, and design thinking to address organizational challenges. They help companies identify opportunities, define problems worth solving, and align design work with business goals. This role requires fluency in both qualitative research (understanding people and culture) and quantitative analysis (understanding markets and metrics). Design strategists often work with teams from different departments, translating between business stakeholders and creative practitioners.

Accessibility + Inclusive Design

Accessibility specialists ensure digital products and services work for people with diverse abilities. This role combines technical knowledge (web accessibility standards, understanding of assistive technologies like screen readers, etc.) with research skills testing with disabled users and understanding cognitive or physical barriers. As legal requirements and ethical expectations around accessibility have grown, so has demand for specialists who can embed inclusive design into creative practice.

The Common Thread

What connects these paths is research. Whether you're designing interfaces, conducting studies, or shaping strategy, the ability to ask good questions, gather meaningful data, and translate findings into action is foundational. These roles require both creative and analytical thinking — combining empathy with evidence to create work that serves real human needs.



Combining design thinking, strategic problem solving, and information visualization, cross disciplinary teams at Humantific engage in a term they've coined "visual sense-making."



Equal.is shows how experience designers apply their skills to social challenges, using research-driven design to combat misinformation and rebuild trust through clear, purposeful communication.

EXPERT **VOICE**



Rich Hollant
Founder
CO:LAB + Free Center

FREE CENTER: COMMUNITY PARTNERSHIPS + CREATIVE INFRASTRUCTURE

Space creates access, and access creates power. Access becomes confidence, and confidence becomes participation.

Free Center began with a simple observation about Connecticut's civic landscape: there is very little organizing infrastructure available to underserved communities.

Foundations are often hesitant to fund community organizing directly, and many residents — particularly in Black and Brown neighborhoods — have grown skeptical that their voices truly matter in institutional conversations. The result is an access problem. Communities most affected by decisions often have the least access to the spaces, networks, and resources where those decisions are shaped.

The idea behind Free Center was to address that gap by rethinking how space and partnership could work. Many businesses — including my design studio CO:LAB — have underutilized space: conference rooms, offices, reception areas that sit empty much of the time. What if those spaces were opened to the community when they weren't in use? What if the same marketing and communications skills used in professional work could help community groups organize meaningful gatherings? And what if arts and culture — something people are naturally drawn to — could become the entry point for civic participation and community organizing?

The first major partnership demonstrated how the model could work. Hartford Public Library faced a difficult decision during a budget crisis: closing

neighborhood branches in order to preserve the main branch downtown. Rather than allowing those resources to disappear entirely from the neighborhood, the library partnered with us in a public–private model. CO:LAB moved into a building nearly twice the size of our previous office, and the additional space was opened to the community. Meeting rooms, gathering areas, and nearly two acres of surrounding land — including a community garden — became shared civic infrastructure. The guiding principle was simple: space creates access, and access creates power.



Free Center's shared space hosted artists, organizers, youth programs, and community advocates — it was open to anyone with something to build.

▶ Description

Once the doors opened, the partnerships multiplied quickly. Arts organizations, grassroots cultural groups, individual artists, youth programs, neighborhood organizers, food-distribution initiatives, and community advocates began using the space. Public officials and civic leaders also took notice — Senator Chris Murphy held community conversations there — and what began as an experiment gradually became a thriving cultural and civic hub.

Within that ecosystem, one initiative became particularly illustrative of Free Center's approach: the Independent Artists Fund. The reality of arts funding is that the system often favors those who already know how to navigate it. Artists who have received grants before are far more likely to receive them again, while many talented artists in underserved communities are excluded simply because they lack the time, networks, or institutional familiarity required to compete.

Free Center approached the problem differently. Working with the Hartford Foundation and its advisory group Artists of Color Unite, we distributed $350,000 directly to Black and Brown artists across Greater Hartford. Instead of asking artists to write lengthy grant proposals, applicants answered five simple questions describing themselves and the project they wanted to pursue. From there, Free Center paired them with what we called "fund advisors," who helped translate their ideas into practical plans — budgets, timelines, and partnerships — while advocating on their behalf. In effect, we used our own institutional literacy — our understanding of how foundations evaluate outcomes — to remove barriers so artists could focus on the work itself.

The response revealed the scale of interest and creative energy in the community. Where arts grant programs in the region often received fewer than fifty applications, the Independent Artists Fund received more than three hundred. The projects ranged from films and music albums to murals, dance performances, storytelling initiatives, fashion design, metal sculpture, culinary events, and large community festivals. Some of those projects quickly opened new doors: one young sculptor leveraged his project into a scholarship at the Rhode Island School of Design, while a sitcom pilot episode titled *Beige*, exploring Black men's mental health, was later picked up for development by a television network.

The data generated through the program also helped shift conversations among foundations about how creative work in underserved communities could be supported. The scale of participation demonstrated how much talent and ambition had been waiting outside traditional funding pipelines. While many factors contributed to the region, ultimately directing more than $6 million toward arts and culture initiatives, the Independent Artists Fund helped illustrate the value of simplifying access and trusting artists directly. In particular, the program contributed to conversations about making funding processes more accessible to artists who may not have the time, networks, or institutional familiarity required to navigate traditional grant systems.

Free Center was never meant to be simply an arts venue. It was an experiment in how creative practice, civic partnerships, and community infrastructure might reinforce one another.

One moment captured that spirit perfectly. During a Make Music Day event, a shy sixteen-year-old girl showed up with a karaoke tape and asked if she could sing. Everyone stopped what they were doing and listened. The room cheered her through the entire performance. The next day, she returned with a plan for a solo concert, printed flyers, bought a gown, and performed to a packed house. For a moment, she was the queen of the room — and everyone knew it.

That moment says a lot about what Free Center was doing. When people who rarely feel seen or supported discover that the space, the community, and the opportunity truly belong to them, something shifts. Access becomes confidence, and confidence becomes participation.

In 2025, as major policy changes at the federal level began to threaten funding streams connected to DEI and community arts initiatives, I made the decision to dissolve Free Center as a nonprofit and free the concept from what had become an over dependency on philanthropy. Instead, the model is continuing to evolve toward a structure that encourages the community itself to become more directly invested in — and responsible for — the creative and civic infrastructure it helped build. This next chapter remains an experiment in how creative practice, civic infrastructure, and community ownership can grow together.

DESIGN
CREATES
VALUE

As professional practitioners, we understand that good design creates value.

We've seen how design can visually differentiate one business from another in a crowded marketplace.

We've used it to simplify complex ideas and advance understanding. We've shaped stories out of data, making the abstract tangible. We've crafted emotional connections between people and the products they buy, the services they use, and the organizations, ideas, and communities they support. Design creates value by making a meaningful connection with individuals, and research is the tool we use to foster that connection.

However, to an untrained eye, design can be viewed as a subjective pursuit — one mired in individual style, trend, or seemingly superficial decoration. Many clients understand design as a "point of differentiation" but remain unfamiliar with the complexity of the creative process, or unclear on the difference between audience appropriateness and personal taste. To that outsider, design can represent risk. As budgets tighten and market cycles accelerate, clients want more assurance of projected successes and return on investment (ROI). Proving design's value — especially hard calculations such as ROI — can be difficult on a per-project basis. Smaller firms often lack the time, resources, and expertise to gather this proof.[5]

Luckily, professional organizations around the world have marshalled their resources to investigate the link between design and financial success, helping our profession articulate its worth in language that

resonates. The studies listed here are especially important because of their scope, proving the power of design beyond a single project or agency's body of work. They also highlight the value of research-driven practices — when design strategy is embedded into corporate culture, success occurs exponentially. Use these resources as general examples when discussing the value of your own creative services.

Design + Investment

Design Council is an industry advocate with decades of experience advising the UK government and investigating the link between financial performance and design. Their longitudinal Design Index[6] linked the strategic use of design to stock performance, discovering that companies investing in design performed up to 200% better than the FTSE 100 (the 100 largest companies listed on the London Stock Exchange) — and were more stable, falling less sharply when markets dipped into negative territory. Building on that evidence, the Design Management Institute partnered with Motiv Strategies to conduct similar research in the United States. Their Design Value Index[7] yielded consistent patterns: design-led businesses outperformed the S&P 500 (500 stocks grouped to measure the economic health of the nation) by up to 219%, including during the economic crisis of 2008 — mirroring the market stability Design Council had identified.

Expanding on their stock index investigation, and compiling several initiatives documenting the many ways design strengthens financial performance, Design Council generated a more expansive study, resulting in "The Value of Design Factfinder."[8] This document is a must read for designers everywhere, clearly demonstrating the old adage that "good design is good business." After interviewing 1,500 UK businesses, the research team discovered that sales and revenue growth are more likely to occur for companies that increase their investments in design. Money spent on design yielded products sold and customers acquired. Companies that viewed design as an essential tool for developing new products and services, rather than

only as a tool used to market existing ones, saw significantly increased revenue.

Design Council identified 250 study participants that utilized design in unique ways. Classified as Design Alert businesses, these companies were studied in more detail, providing even more evidence to support the link between design spending and positive business outcomes. Design Alert businesses saw a significant 125% return on investment for every British Pound spent on design. They also saw an average of 6.5% increase in market share. In certain cases, design was used to reveal new opportunities and identify new markets. The Design Alert businesses were also less likely to compete on price, indicating design played a key role in influencing customer perceptions of value.

In 2018, McKinsey & Company published an expansive study tracking the design practices of 300 publicly listed companies across multiple countries and industries, over a five-year period.[9] Using their McKinsey Design Index (MDI), researchers measured not just whether companies invested in design but also how deeply it was embedded into their operations and culture. Companies scoring in the top quartile of the MDI achieved substantially higher revenue growth and returns to shareholders than their industry counterparts — and the results held across physical goods, digital products, and services alike. Perhaps most useful for practitioners, the McKinsey study shifted the conversation from whether design matters to what design-driven organizations actually do differently, identifying four practices shared by top performers:

- Make design a leadership priority, held to the same standards as any other business metric.
- Map the full customer journey across physical, digital, and service touchpoints.
- Embed designers across teams so that user-centered thinking informs every decision.
- Test and iterate with real users early and often, not just at the end of development.

RETURN ON **INVESTMENT**



Design Council's "The Value of Design Factfinder" found that design-led businesses yielded a 225% return on investment for every British Pound spent on design.

The Design Staircase

Established in the 1970s with the intent to boost exports and promote business and industry, The Danish Design Center (DDC) initially focused on the practice of industrial design. Their efforts have since expanded to include diverse design disciplines with an emphasis on value generation. The DDC created a framework for understanding how design creates value for business, called The Design Staircase. They then used that framework to survey 1,000 Danish companies, presenting their findings in "The Economic Effects of Design" report.[10]

The Design Staircase has four levels, or stages:

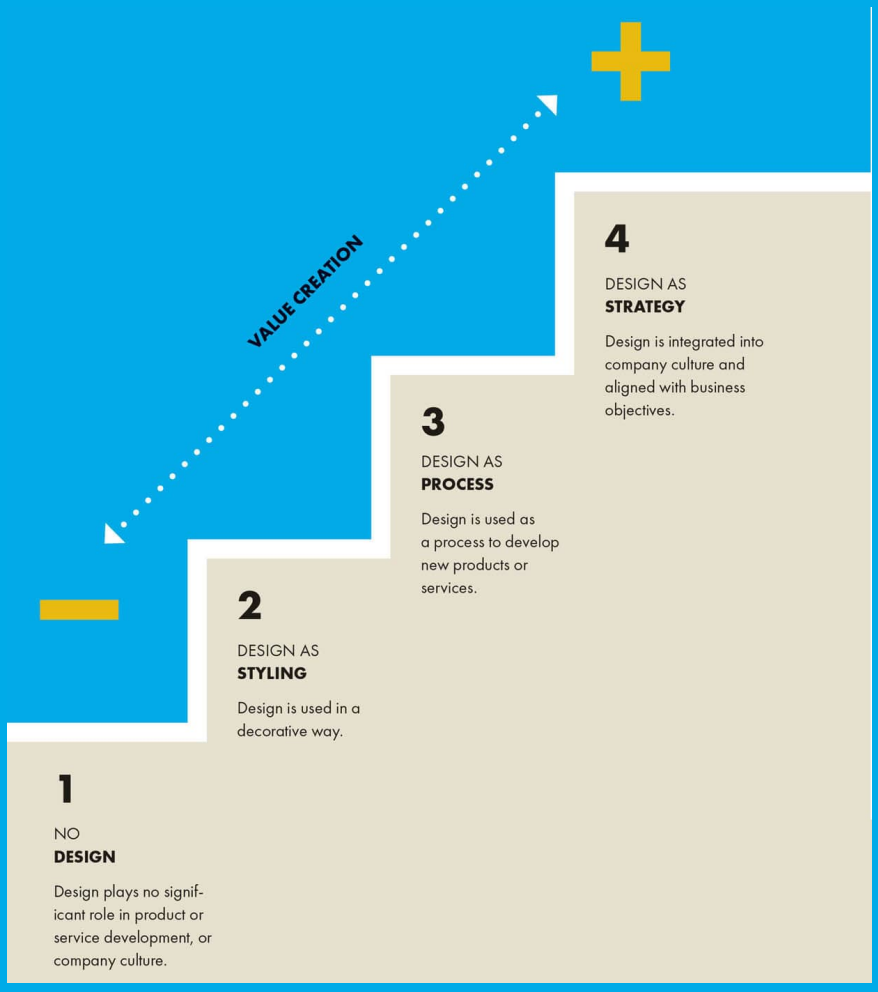
- **Stage One: No Design**
  Design plays no significant role in product or service development, or company culture.
- **Stage Two: Design as Styling**
  Design is used in a decorative way.
- **Stage Three: Design as Process**
  Design is used as a process to develop new products or services.
- **Stage Four: Design as Strategy**
  Design is integrated into company culture and aligned with business objectives.

The DDC discovered that companies that were operating at the top of the model (stages three and four) saw significant returns on design investment and had up to 20% more growth in revenue. These companies also had increased exports.

The methodology used in The Design Staircase was embraced by the Centre for Design Innovation in Ireland,[11] where the study was replicated with a focus on Irish businesses. Adding validity to the DDC's findings, despite market variances, the Irish survey yielded similar results. In their study, the Centre for Design Innovation found that companies operating on the top two levels of the Staircase were more than twice as likely to see increased demand for products and services, while companies operating at the bottom were much more likely to remain stagnant.

Both studies illustrate that design, when integrated as a part of corporate culture, becomes a tool for innovation and a predictor of success.

THE DESIGN **STAIRCASE**



The Design Staircase, developed by The Danish Design Center, provides a framework for analyzing the relationship between design and value creation. As an organization moves up the staircase, integrating design into its culture of practice, more value is achieved. This includes higher returns on investment, exposure to new markets, and increased brand loyalty and customer satisfaction.

▶ Description

QUICK
TIPS

You're looking for insight, not evidence.

As you begin to consider what research can do for your design practice, also try to understand what it can't do. You're undertaking these actions to generate better, more effective problem-solving. You're not trying to definitively prove that your solution is the best or only answer.

Shift your orbit.

Put people at the center of your process. Aesthetics absolutely matter, but not at the expense of audience. Understand what's important or resonant to the user and you can impact their lives (and the project's success).

There is nothing new under the sun.

(Very little, anyway.) Don't let clients balk at research as a newfangled service, add-on, or extra. There's ample historical precedent for the success and importance of research-driven design. Use these stories as evidence for your own intentions. Remember, you're positioning yourself as a strategist and partner, not a take-out menu of à la carte creative services.

What's next?

Adding new skills to your creative arsenal helps you solve communication challenges. It can also increase career opportunities. Familiarity with the research practices covered in this book will serve the graphic design generalist well; fluency is the minimum expectation in aligned fields. If you like what you're learning, dig

deeper, and expand your options. (There's a resources section in the back of the book to get you started.)

CHAPTER 2

RESEARCH STRATEGIES + TACTICS

Though the power of design may not always be easily measured, there are many steps that practitioners can undertake to ensure that they are making informed communication choices, rather than producing artifacts rooted solely in aesthetics.

BIG CONCEPTS
IN RESEARCH

Research findings can help the designer in a variety of ways. From supporting great concepts to measuring the effectiveness of finished projects, a research-driven approach can help define the way problems are solved and illustrate the value of those solutions.

This section provides an overview of traditional research methods and a discussion of their application to the field of graphic design. Because design artifacts (websites, brand collateral, annual reports, mobile applications, etc.) are generally visual vessels for the application of research findings, it is important to begin with a survey of methods (theory), strategies (planning), and tactics (action).

Quantitative + Qualitative Research

When discussing research methods, there are two distinct categories into which most data-gathering exercises fall: quantitative and qualitative.

Measuring sets of variables or quantities and their relationship to one another produces quantitative research. This form of research is built around numbers, logic, and objective data. For example, a person studying the effects of global warming may take measurements of temperature over a given amount of time to determine the rate in which the climate is changing. Though well suited to scientific pursuits, applying these metrics to creative inquiry is less successful. Instead, designers look to the social sciences for a model that better suits our specific needs. Also incorporating statistical methods, quantitative marketing research is a social research technique focused around the development of questionnaires, the responses to which can be scored and measured. For example, if a designer wanted to determine the relationship between a user interface and user satisfaction, the designer could ask

a population of users to fill out a questionnaire. The information gathered would then be scored and measured. The resulting information could be useful in developing further iterations of alternate structures, measure the success of the current design, or even inform future projects.

QUANTITATIVE	QUALITATIVE
He is 6 feet 7 inches tall.	He is tall.
They eat 6 meals a day.	They eat all the time.
The president's approval rating is at 60 percent.	The president is well liked.
The cruise ship served 3,000 passengers.	The cruise ship was huge.
The cat weighs 20 lbs.	The cat is fat.

Quantitative research measures objective data, whereas qualitative research measures subjective data, such as the qualities surrounding an area of inquiry.

Whereas quantitative research deals with objective data such as numbers and logic, qualitative research deals with subjective material such as words and images. This research approach strives to understand the qualities of a specific field of inquiry. This form of investigation uses tools such as individual or group interviews, literature reviews, and participant observation to understand and explain social behavior. For example, if a researcher wanted to gain insight regarding the shopping habits of teenagers, she might spend several days on location watching the subjects at a mall or shopping center, documenting her observations. Reviewing the resulting documentation, the researcher might be able to find commonalities and thus formulate a theory on teenage purchasing behavior. In visual communication design, the majority of research practices fall under the qualitative umbrella. As designers continually develop new objects for diverse audiences, they must strive to understand the detailed needs of those consumers. Human behavior is not easily quantified; hence qualitative research strategies, born of the social sciences, are often a better fit for creative pursuits.

Primary + Secondary Research

The terms "primary research" and "secondary research" might imply they happen in succession. However, they instead refer to proximity and specificity of source. Primary refers to original research that is conducted by an organization for its own use. For example, a cosmetics company in the United States might use observational research combined with surveys and questionnaires, targeted at middle-school-aged girls, to determine preteen purchasing habits. They would then use the resulting data to inform their packaging, product placement, and other marketing and design elements.

Secondary research refers to the practice of reviewing a collection of data or findings that have previously been published by an outside party, for an alternative function. For example, if a record label in the United Kingdom could obtain a copy of the research produced by the cosmetics firm we've just mentioned, they might be able to use that information to aid their marketing strategies for music sales to teenage girls. Chances are that reviewing the cosmetics firm's brief would be much less expensive and faster than commissioning a focus group or conducting individual interviews or surveys. The information certainly would be relevant to those planning a campaign directed at the discretionary income of an adolescent. However, lipstick and music are vastly different products. Additionally, though the subjects of both inquiries share gender and age commonality, they may well vary from a cultural perspective. Secondary investigation, though less expensive, may or may not fit the exact needs of the researcher.

Formative + Summative Research

Formative or exploratory research is used to gain insight into an area of study or to help define a question. This kind of research is especially useful for design applications, because in the business of innovation, identifying and then clarifying communication issues is essential. Formative research aids in problem identification and problem solving. There are a number of research tactics that could be considered formative, including (but not limited to) literature reviews, trend forecasting, video ethnography, surveys and questionnaires, demographics, and user testing.

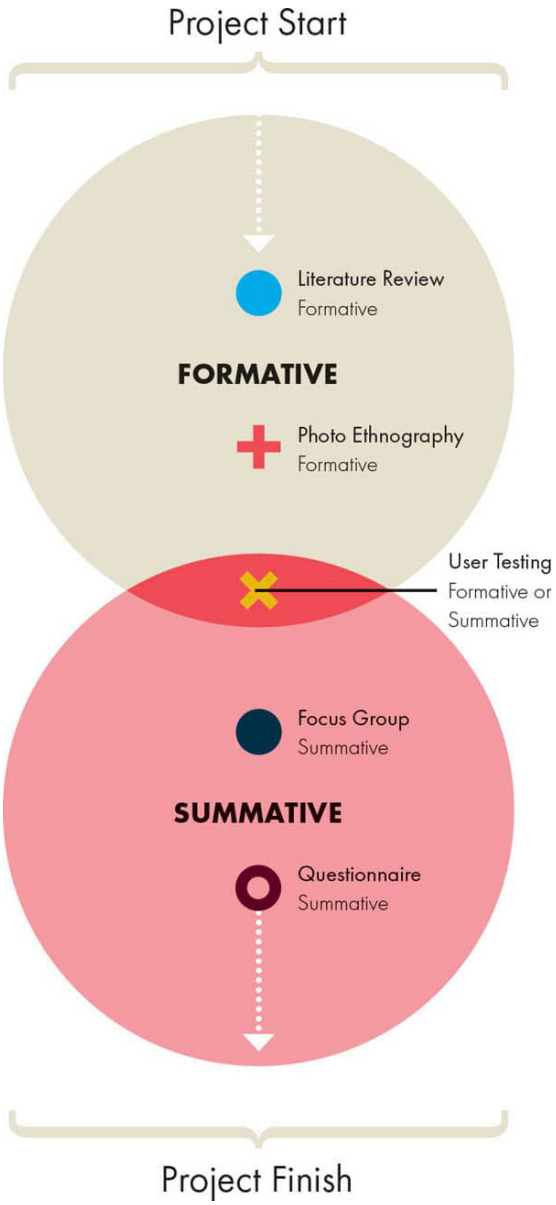
Summative or conclusive research is used to frame and decipher the outcome of an investigative process. It confirms that the original hypothesis is correct or illustrates that it is flawed. Summative research can answer questions such as, "Did I do it correctly? Did I make it better? Is it more successful?" There are many research tactics than can be summative, including (but not limited to) focus groups, user testing, surveys and questionnaires, and analytics.

PRIMARY	SECONDARY
Commission a focus group of skateboarders, aged 12–18	Read skateboard magazines to familiarize with youth subcultures
Hire a marketing research firm to collect data about BMW owners' mean income	Purchase previously published demographic data about the luxury car market
Engage octogenarians in a photo-ethnographic study at a nursing care facility	Surf stock photography websites for images representative of seniors in nursing care facilities

Primary research is conducted specifically for an individual commission. Secondary research has already been completed for a different project but may apply in some way to the current investigation.

Most research tactics can be either formative or summative, depending where and when they are employed during the cycle of a project. For example, user testing might be performed before beginning the design of a new project by having test subjects navigate selected URLs while tracking their responses. The data collected in those sessions would then inform navigational structures

developed for the new site. A focus group could be used to determine a target audience or to evaluate a newly designed magazine cover. Observational research might be employed to assess information architecture at a library — both before new systems are implemented and afterward. The possibilities and combinations are as limitless as creativity, time, and resources will allow.



Formative research is conducted at the start of a project to help frame the design problem. Summative research is used to evaluate prototypes or finished products, measuring them against pre-established project goals.

Basic + Applied Research

Basic research may sound like something elementary or easy, but the term actually refers to research conducted to gain new knowledge within a specific area, or research undertaken to satisfy the curiosity or personal interest of the researcher. A defining factor for basic research is that the activity isn't initiated with intent for commercial application.

In a design context, basic research may take the form of personal creative exploration through things such as drawing, painting, or photography. Experiments with form, composition, and color might then influence design decisions on future projects undertaken for clients. Designers may also experiment with new programming languages or software to add skill sets and learn new tools. While each of these scenarios may have indirect commercial application, the motivation and resulting creative outputs have not been commissioned by clients. They have been undertaken to explore ideas or techniques that add to the individual researcher's toolbox, or provide a safe creative outlet to experiment with new concepts.

For designers, basic research supports the growth of the individual or creative team. Experiments conducted through basic research might later lead to new service offerings, client acquisitions, or entrepreneurial opportunities.

Alternatively, applied research is the term for any research activity commissioned specifically for a project, or with the intent of commercial or public use. Applied research efforts are focused on developing new products, experiences or services, serving commercial and/or social needs.

Applied research is an increasingly expected component of design practice, conducted to identify and clarify issues related to project goals; influence aesthetic choices; meet the business problems of the of the client; and serve the needs of an audience.

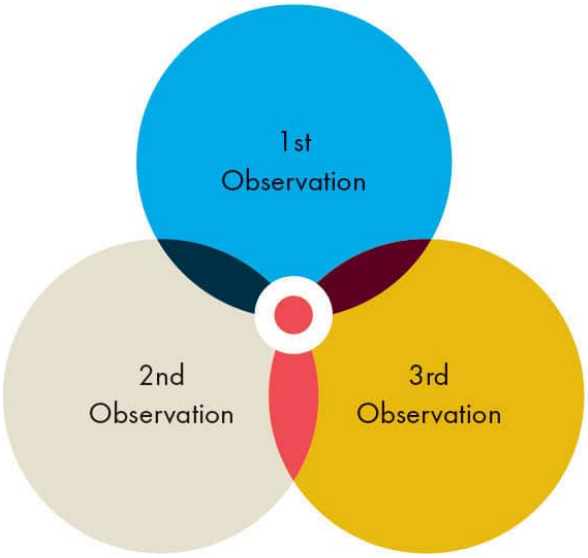
TRIANGULATION

Confirm Research Findings

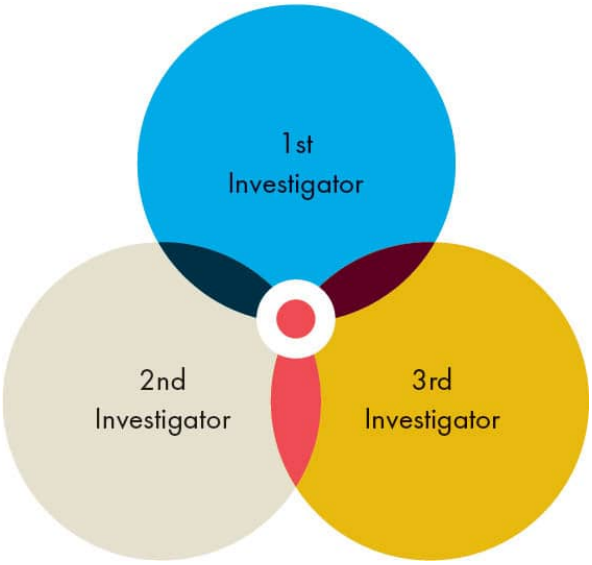
Triangulation is the process of combining several different research methods to illuminate one area of study, in other words using several research tools to examine the same thing. Triangulation is commonly used by the social sciences and adds credibility to qualitative research. By incorporating different tactics, the researcher can overcome issues of validity inherent with many singular qualitative approaches. The goal of triangulation is to confirm the findings of each individual tactic by focusing on where the collected information overlaps. This area of overlap, called convergence, is considered to be the most accurate representation of truth.

Research findings can be triangulated in a number of ways. For example, secondary research triangulation would compare a variety of previously published data (perhaps aggregated via articles, books, journals, and reports). Method triangulation would compare the findings of multiple and varied research tactics (perhaps collected via focus groups, user testing, and observational research). Investigator triangulation would compare the findings of multiple researchers (perhaps collected over a period of time, or from multiple sessions in the field). To be unequivocally thorough a researcher might employ multiple variations of triangulation, comparing areas of convergence.

TRIANGULATION OF **OBSERVATIONS**

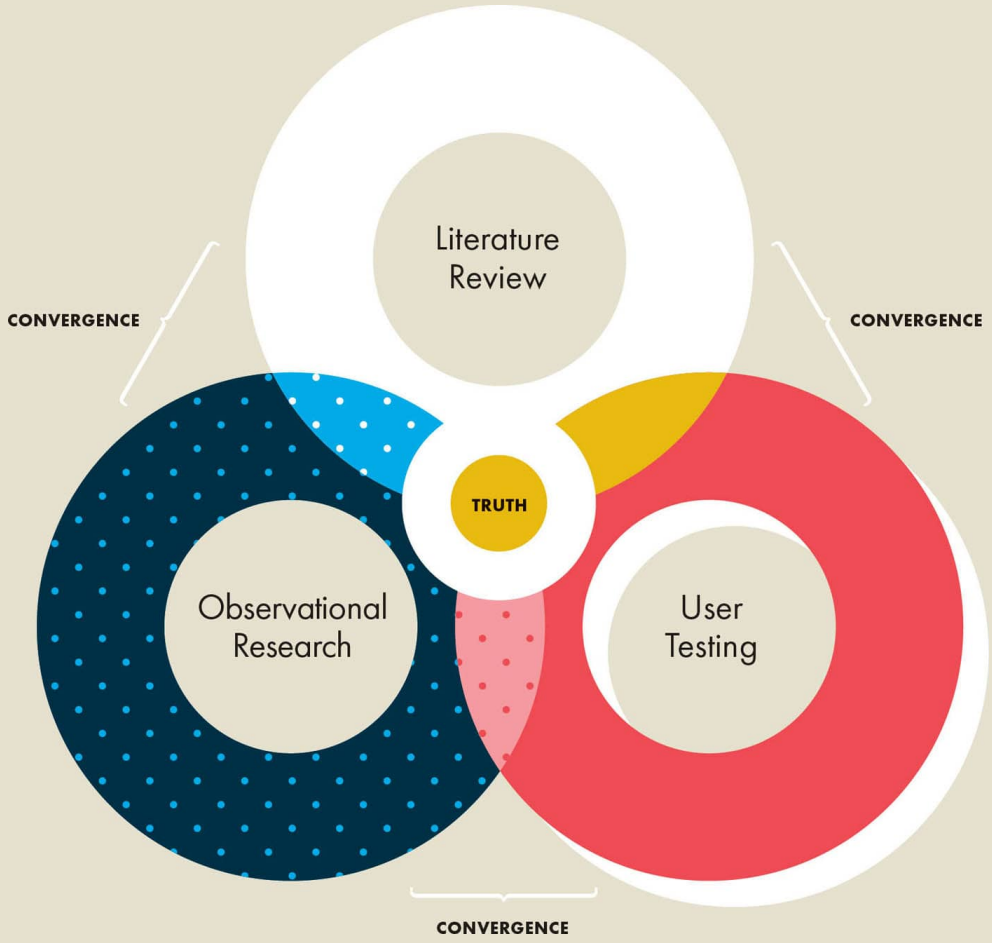


TRIANGULATION OF **INVESTIGATORS**



The concept of triangulation doesn't just apply to the use of multiple research methods. You can also triangulate results from observations collected over a span of time, or use the process to compare notes from multiple investigators.

TRIANGULATION OF **METHODS**



Triangulation is a process that compares and validates findings from qualitative methods by looking for overlapping and common results. Where findings begin to overlap is called convergence, which is the best representation of truth in the information gathered.

STRATEGY:
LITERATURE REVIEW

Literature reviews are undertaken as a starting point for all other research strategies. A literature review is a comprehensive investigation of all documents, publications, articles, websites, and books regarding a specific area of study. This first step in the research process can also include a client's corporate communications, as well as those of their competitors, in which case it is often referred to as a communications audit.

TACTICS COVERED:

Communication Audit
Competitor Profiling

RELATED:

Visual Anthropology
Demographics + Psychographics

A literature review is an important initial step, allowing the researcher to become familiar with historical references and parallel associations, as well as current market conditions. Literature reviews can also clarify research problems and be influential in the

development of investigation strategies during later phases of the creative process.

Literature reviews help save time by enabling the design team to frame their problem and understand how similar communication problems may have been approached in the past. A comprehensive literature review will ensure that the researcher does not redouble efforts undertaken during previous investigations of the same subject.

Literature reviews are a formative tactic, used to orient the researcher to the current body of knowledge in a given area. In client/designer relationships, a literature review can be undertaken to gain insight into corporate culture, competitor analysis, and market trends. It can even influence search engine optimization, use of social media, and media buying practices.

Artificial intelligence tools can assist with literature reviews by quickly summarizing research papers, identifying themes across multiple sources, and suggesting related materials. However, AI has significant limitations: it may generate inaccurate citations, miss recent publications, or present information confidently even when incorrect. AI tools should be used to help organize and explore research, not as substitutes for reading original sources or evaluating credibility. The researcher remains responsible for verifying all information, assessing source quality, and drawing informed conclusions. AI can accelerate parts of the research process, but it cannot replace critical thinking and professional judgment.

Literature reviews are a relatively easy task compared to many of the other forms of investigation discussed in this chapter. Literature reviews require a strategy for finding and extracting relevant information, which can be aided by the help of a librarian or other research professional. Librarians, whether at community or university institutions, are trained professionals who have extensive knowledge of and access to proprietary research tools unavailable to average Internet users. They can help guide a search and may also assist in

locating credible source materials directly or tangentially related to the area under study.

TACTIC:
COMMUNICATION AUDIT

What is it?

A communication audit is a comprehensive review of an organization's marketing materials and an assessment of the channels they use to communicate with clients, customers, or constituents. The goal is to better understand what a company is saying about itself, to whom, and how.

What can it do?

Communication audits outline the messaging an organization intends to project, and analyze how it actually resonates with an audience. These audits determine if those messages are being received and understood. This undertaking builds on the information gathered in literature reviews by engaging with the audience through actions such as interviews, focus groups, surveys, and questionnaires. A communication audit can tell you if internal perspectives of an organization match external perspectives — and if not, where the messaging breaks down.

How is it used?

Communication audits are used to illustrate how an organization's internal image and external image overlap, and identify contradictions. This assessment can help reveal which components of current communication strategies are working, where there are disconnects, or even new or missed opportunities. Design teams can analyze the results of a communication audit, looking for holes, and then propose actions aimed at filling the gaps.

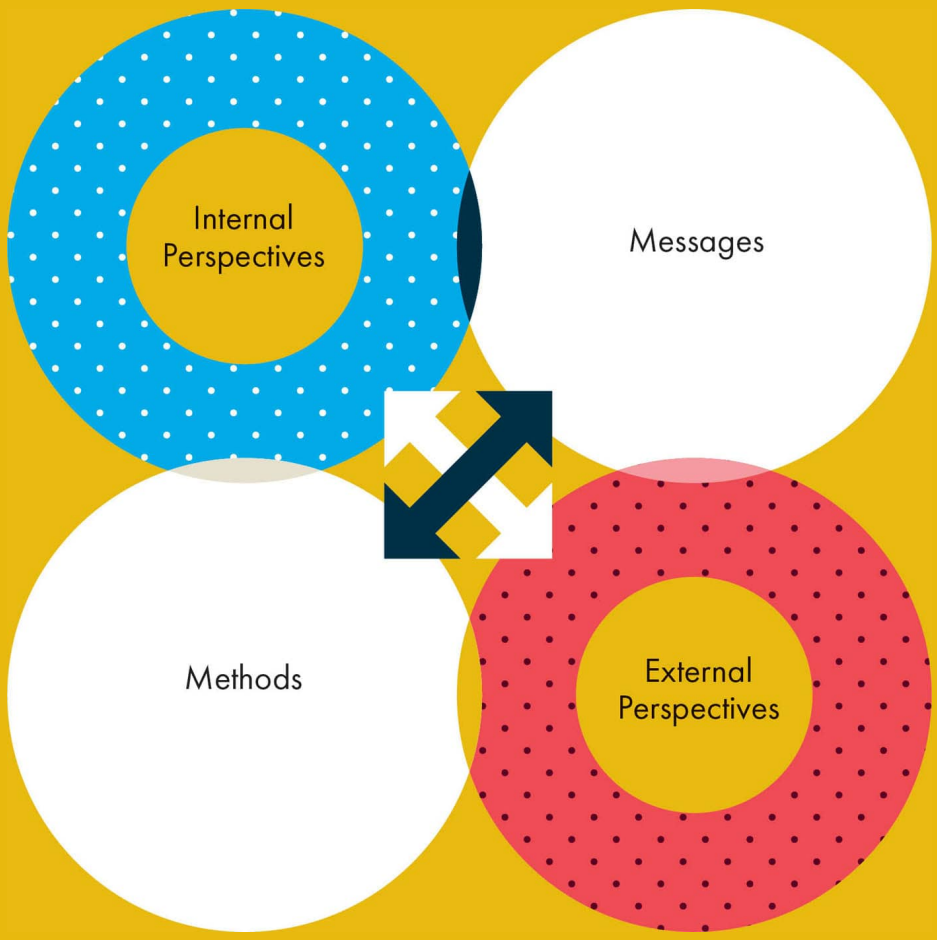
When is it used?

Communication audits should be undertaken early in the research process to help diagnose breakdowns in existing messaging. Data collected through this exercise can inform which media channels to use, influence project messaging and approach, and support aesthetic rationale.

Level of difficulty/complexity?

Communication audits are approachable. Most designers already collect information from new clients to establish a better understanding of history, brand, and audience. This extends the basic literature review process by assessing how those communication materials were received. In addition to basic business acumen and secondary research experience, interviewing know-how and strong interpersonal communication skills will help establish dialog and moderate discussions.

COMMUNICATION **AUDIT**



Communication audits investigate how an organization views itself, and how it is viewed by others. Designers use communication audits to see if a client's messaging matches their internal vision, and if it resonates with their intended audience. Alignment of these criteria indicate that communication programs are successful. Gaps may indicate that communication efforts are breaking down.

▶ Description

TACTIC:
COMPETITOR PROFILING

What is it?

Competitor profiling is the process of evaluating the strengths and weaknesses of an organization's competition. It uses open-source intelligence — information published in the public domain (secondary sources) — to determine competitive advantages.

What can it do?

Competitor profiling helps differentiate. This information can be used to enhance brand position, adjust or confirm mission, and focus communication strategies — revealing unique qualities that help a product, service, or organization stand out in a crowd.

Competitor profiling provides the designer with a broad understanding of their client's market conditions. This knowledge can help a creative team communicate empathy for the factors influencing a company's bottom line, the shared understanding mitigating perceptions of risk in new designer/client relationships.

How is it used?

Think of competitor profiling as a communication audit of the competition. The goal is to draft approachable summaries of companies or organizations practicing in the same market (read more about communication audits on this page).

Competitor profiling requires the collection of open source information. Assembled profiles may include details about competitive companies' history, finances, products, markets, facilities, personnel, brand positions, and marketing strategies. The facts, stats, and observations gathered are assembled into reports, used to determine the following about industry peers:

- What does Competitor A say about itself, to whom and how (social media presence, advertising, press releases, corporate communications pieces)?
- What do external audiences (customers and strategic partners) say about Competitor A?
- What are Competitor A's discernible strengths and weaknesses?

When is it used?

Competitor profiling is a formative tool; use it at the beginning of a research plan to help the creative team understand market conditions and history. Combine with a communication audit and identify a client's unique strengths and assets by comparing those of peer companies. This exercise is part of a comprehensive literature review strategy, not a standalone method.

Level of difficulty/complexity?

Competitor profiling is a feasible research strategy for many designers. While careful investigations may be time intensive, they can prove beneficial when applied to a larger communication campaign. The information gathered can help determine messaging, media buys, target audiences, and other factors, and is essential to differentiating a client from other companies in their marketplace.

When discussing competitor profiling, the term "competitive intelligence" can arise. Competitive intelligence combines the secondary source tools of competitor profiling with primary research. The goal of both strategies is the same, but competitive intelligence often employs much more aggressive tactics. Some corporations have gone as far as hiring "informants" on their competitor's staff, or releasing — and then rehiring — an employee after he or she has worked for the competition. Many businesses now use no-compete clauses and confidentiality agreements in an effort to prevent such practices. For the purposes of this discussion of research techniques and how they aid design practice, competitor profiling is a useful and ethical strategy when compiled from previously published material.

PRIMARY USE OF **COLOR**		PRIMARY USE OF **FORM**	
Red	••	Square	••••••
Orange	•	Circle	••••
Yellow	•••	Triangle	•
Green	••••	Pictographic	•••
Blue	•••••	Organic	••
Purple	••	Typographic	••••••
Neutral	••	Combination	•••••••

Matchstic, a brand identity firm in Atlanta, shared a unique technique employed before designing corporate identity programs. They catalog the use of shapes, colors, even typography in competitors' logos (similar to the chart shown here). The resulting report outlines that market's aesthetic culture, providing easy points of differentiation for their client's new mark.

EXPERT **VOICE**



Justin Ahrens
President + Chief Creative Officer
Rule29 Creative Agency

HOW AI IS TRANSFORMING COMPETITIVE + SECONDARY RESEARCH

AI lets us spend less time collecting and more time connecting — between data and meaning, between what people say and what they truly feel.

Good design starts with understanding. The clearer you can see your client's world, their market, competitors, and audience, the stronger your creative decisions become.

For most of us, that clarity starts with secondary research and competitive analysis. It's also where time, budget, and access tend to run out.

AI has changed that.

On my team, we use AI every day to extend our reach in research and discovery. It doesn't replace strategy or judgment; it expands them. Think of it as a research partner that helps you go deeper in less time.

Scanning the Landscape

Traditional competitive analysis often meant hours of manual searching: gathering brand materials, reviewing social channels, downloading reports, and summarizing notes. AI now handles much of that first layer, quickly identifying

competitors, summarizing positioning, and extracting patterns in tone and messaging.

When we begin a rebrand, we ask an AI model to gather and summarize how ten competitors describe their value propositions and customer experience. Within minutes, we have an organized view of what's consistent in the category and where white space exists. That shapes what to question in interviews, which angles to test, and where differentiation might live.

Synthesizing What Matters

The hardest part of research is making sense of too much data. AI helps translate findings into usable patterns. We feed in notes, articles, transcripts, and reports; AI clusters recurring ideas, flags contradictions, and drafts opportunity statements.

One useful feature is that it detects emotional tone — how audiences talk about a brand, not just what they say. That saves days of manual coding.

Validating Insights

AI helps test whether findings are unique or noise. We ask it to check claims against market data or surface counterexamples from credible sources.

If we think a brand's sustainability promise is a differentiator, we'll ask AI to identify how many competitors make similar claims and what proof they show. That clarity helps craft messaging that feels authentic rather than generic.

Connecting the Dots

AI links insights across silos — marketing data, social listening, reviews, trend reports — into a single, searchable view. We're building living research libraries that inform future work, like an institutional brain for design strategy.

What It Makes Possible

AI doesn't make creative research less human; it removes the friction that used to limit it. Smaller teams can work with the rigor of large ones. Large teams can move with startup speed.

Used thoughtfully, AI strengthens every stage of design thinking by giving teams more time to listen, interpret, and imagine.

As AI evolves, knowing how to ask, interpret, and apply it responsibly will define the next generation of creative leaders.

AI lets us spend less time collecting and more time connecting — between data and meaning, between what people say and what they truly feel.

The designer's job hasn't changed. We still ask questions, find patterns, and translate insights into form and experience. What's changed is how quickly and deeply we can do it.

AI gives us the scale to see the whole landscape and the time to focus on the people within it.

STRATEGY:
ETHNOGRAPHIC RESEARCH

In a design context, ethnographic research endeavors help the creative team understand what it's like to be a member of their project's target audience (*Who is it for?*). Immersing in the user's perspective provides insight on how a design piece needs to perform (*What will they do with it?*). The empathy gained by being immersed in the user's perspective may also expose new opportunities for design (*How can we make this better?*).

TACTICS COVERED:

Contextual Inquiry
Observational Research
Photo Ethnography
Self Ethnography
Unstructured Interviews
Visual Anthropology

RELATED:

Focus Groups
Surveys + Questionnaires
A/B Testing
Card Sorting

Personas
Color Psychology

Ethnography is a research strategy, created by anthropologists, that focuses on the link between human behaviors and culture.

Ethnographers strive to understand and separate the emic perspective (pronounced *ee-mik*) from the etic perspective (pronounced *eh-tik*). Emic investigations define cultural phenomena through the perspective of the community under study. For example, to develop an emic understanding of graphic designers, one might conduct individual interviews directly with practicing design professionals. Etic investigations define cultural phenomena from the perspective of an individual who is not a participant in the community under study. So an etic view of graphic designers might be found by interviewing their clients or family members. Ethnographic researchers try to focus their efforts on understanding the internal perspective of the community, using outside perspectives only to augment the data gathered.

When choosing subjects for ethnographic study, geographic clusters, interests, ages, or a variety of other segmentation criteria can be used. Macro-ethnography studies large populations of people, whereas micro-ethnography conversely focuses on smaller populations. When a community has been chosen, the ethnographer — sometimes called a field-worker, or field researcher — will conduct background research and identify a specific question to be examined. Immersion into the chosen culture is sometimes necessary for the researcher to gain credibility from participants (subjects won't act "naturally" if they are uncomfortable or anxious about observation). The researcher may identify key "informants," who then lead to other informants, using a snowball sampling method to conduct interviews and re-interviews over an extended period of time. These interviews use open-ended questions to draw more details from the subject. Documentation of interviews, copious field notes, photography, and video can provide valuable information in

understanding end users in context. After researchers have developed a theory, they may return to the group to test that assumption.

Though ethnography is qualitative research, the subjective observations made by the researcher are considered to be as much, if not more, valuable than any quantitative or objective data that may exist about the chosen community. This research strategy is considered subjective for several reasons:

- Some researchers may have previous experience with the group they are studying, while others may have no prior exposure at all. Therefore, observations collected by multiple researchers may occasionally conflict.
- Because ethnographic research involves humans in a specific context, time and place, ethnographic research experiments can never be exactly replicated.
- No matter how objective the researcher tries to be, it is impossible to separate one's personal worldview from interpretive observations.
- The researchers cultural background and personal history may influence their observations and interactions with the group being studied.

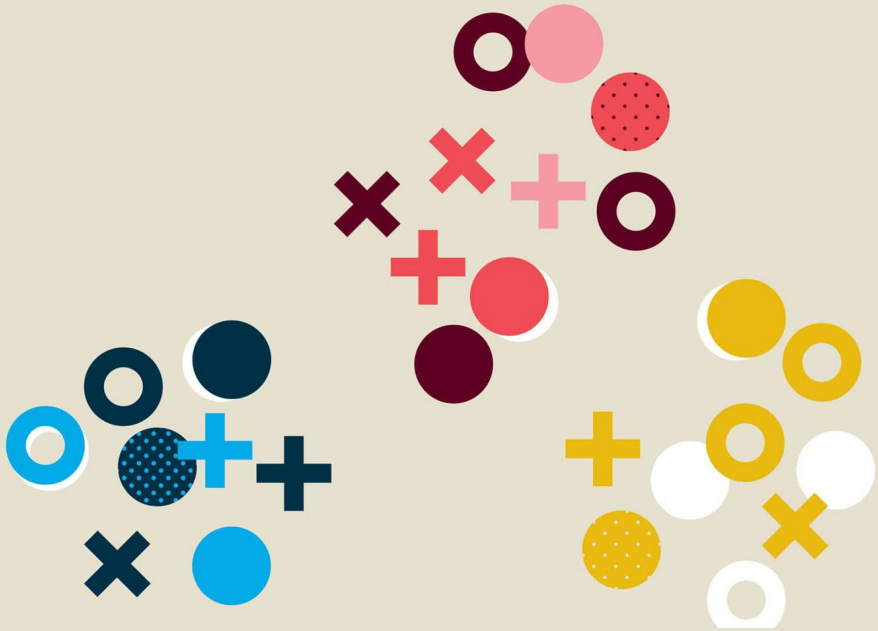
Good researchers will also use several different tools to document the experiences leading up to their conclusions. This triangulation of interviews, recordings, field notes, and photographs helps confirm the researcher's distilled observations. Additionally, many ethnographic inquiries occur over an extended period of time, and the deep immersion of the researcher adds to the validity of the study.

Because ethnographic research involves the study of and interaction with human beings, researchers must make certain ethical considerations before engaging in fieldwork. With rare exceptions, the community under investigation must be made aware of the intentions of the study and must agree to participate. The American Anthropological Association's statement on professional ethics is a good resource for ethical guidelines. If working at or in partnership with a hospital, laboratory, or university, you should consult with its Institutional Review Board (IRB) — an entity created to ensure the ethical treatment of human subjects — before undertaking any ethnographic study. IRBs can provide best practice guidelines and

assistance drafting consent forms and other legal documentation that may be relevant to (or required for) the human subject components of your research program.

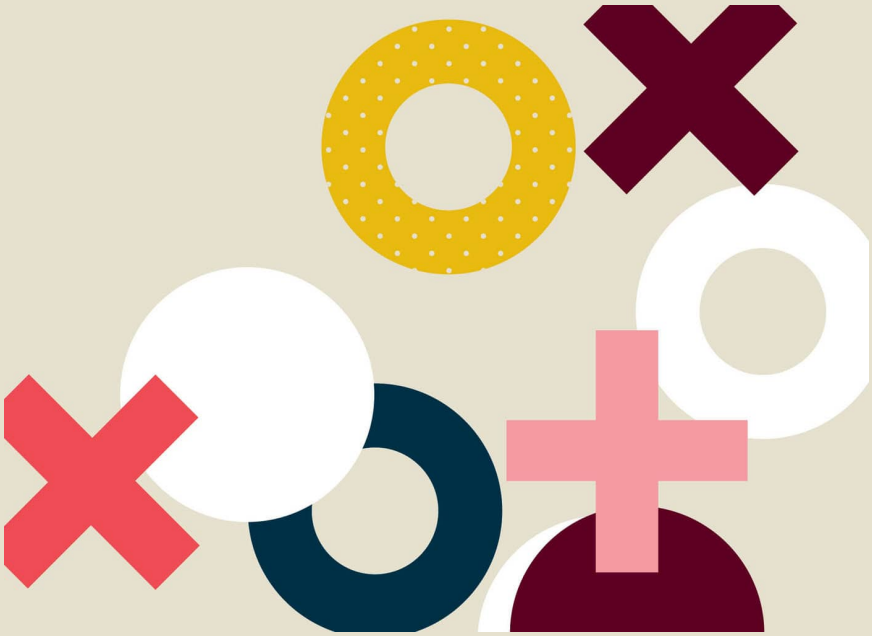
Note: For more information on how to triangulate research, see here.

MACRO-**ETHNOGRAPHY**



Market segments are often defined by standard demographic categories such as age, sex, and race. That view alone may lead to the false assumption that certain individuals have little in common.

MICRO-**ETHNOGRAPHY**



Mapping micro-ethnographic groups around a variety of categories and specializations (personal interests, geography, career pathways, and so much more) can help researchers discover patterns of behavior that expand past traditional macro-enthnographic boundaries.

TACTIC:
CONTEXTUAL INQUIRY

What is it?

When unstructured interviews are conducted in a location related to how a person will use a design piece, the process is called contextual inquiry. For example, if working on a new self-checkout interface, the researcher might conduct interviews at a grocery store, rather than bringing shoppers to a neutral setting, such as a conference room or lab.

What can it do?

Contextual inquiry gives the researcher an opportunity to document what the subject actually does, instead of what they claim to do. This process places the user and their activities in context, permitting them to be the expert who demonstrates how tools, products, and services integrate into their daily experience.

Contextual inquiry allows the design team to consider influencers such as physical space, objects in the environment, and expected time-on-task. It also provides an opportunity for the researcher to take cues from facial expressions, body language, and interpersonal interactions.

How is it used?

Contextual inquiry reveals the real-world user issues that might go undiscovered in a more sterile lab setting. This tool is especially important in design endeavors that strive to modify or change behavior. Contextual inquiry grants direct access to the user's environment, highlighting the ways it may affect their activities. This provides a baseline for behavior, and allows the researcher to see firsthand where design might influence change.

Insights collected from contextual inquiry can be aggregated into experience maps, which document the action from start to finish. These can chart a single user's experience, or those of multiple participants. Multi-user maps can demonstrate continuity of experience, or identify gaps, and either result might reveal opportunities for design. The maps also become effective tools for sharing research analysis with team members and clients (read more about experience maps on this page).

When is it used?

Contextual inquiry is used as a formative tool, helping creative teams frame their assignment. Interviewing and observing the people using a product or service in the environment where it exists (or will exist), provides a critical understanding of use.

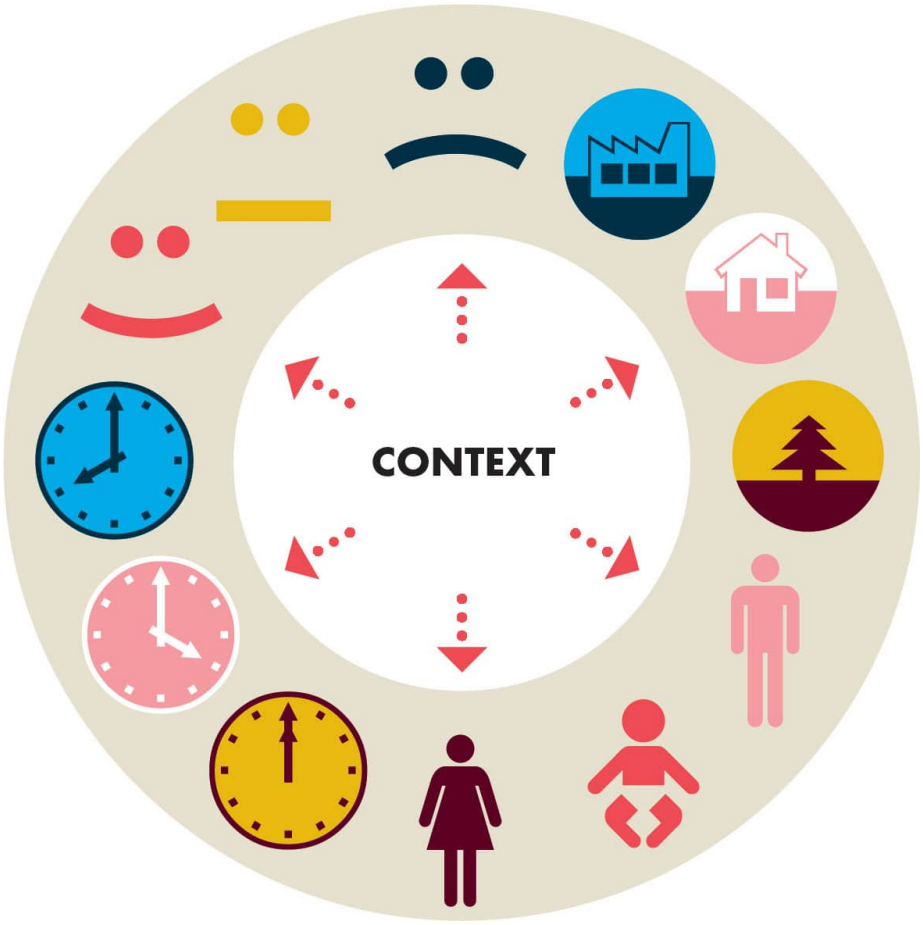
Level of difficulty/complexity?

Contextual inquiry is a blend of observational research and unstructured interviews, so basic interpersonal and interview skills are essential. Since the researcher is trying to perform two separate tasks at the same time, conducting an interview and making observations, working in teams results in more accurate information gathering. Assign one researcher to engage in conversation with the participant, while another is taking field notes, photos, or video.

Having help in the field also provides a second perspective on the events witnessed, affording more observational validity. Follow-up immediately after information gathering to compare thoughts while the experience is still fresh.

Whenever possible, record audio. This ensures your interpretation of the events remains accurate, and allows for sharing of research with team members and stakeholders not present during the original observation. They may hear things essential to the project that seemed unimportant at the time.

CONTEXTUAL **INQUIRY**



Contextual inquiry requires the researcher/observer to consider all the factors that might influence a person performing an activity, including things such as physical space, time-on-task, and other people or objects in the environment.

▶ Description

TACTIC:
OBSERVATIONAL RESEARCH

What is it?

Observational research is the systematic process of viewing and recording human behavior and cultural phenomena without questioning, communicating with, or interacting with the group being studied.

What can it do?

Simply observing people and phenomena, rather than conducting interviews, may provide a great deal of useful information. Through the resulting documentation of social behavior, researchers learn many things about attitudes and perspectives without influencing group behavior. This tactic allows for greater observational validity because the group under study is unaware of the researcher. The researcher is able to record and analyze what the subjects are actually doing, rather than what they *say* they are doing.

How is it used?

There are several keys to conducting successful observational research. The investigator must remain quiet and observant and try to understand the behaviors exhibited. It is important to remain objective, and therefore not interact with subjects. In this case, the researcher does not ask questions or solicit opinions — the focus, instead, is to watch and closely examine group behavior.

Observational research can be conducted in different ways. Researchers can go into the field and record their observations, or they can record images mechanically with video cameras (for example, to study human traffic patterns in an airport). Of course, if images are recorded with cameras, it is important to the anonymous

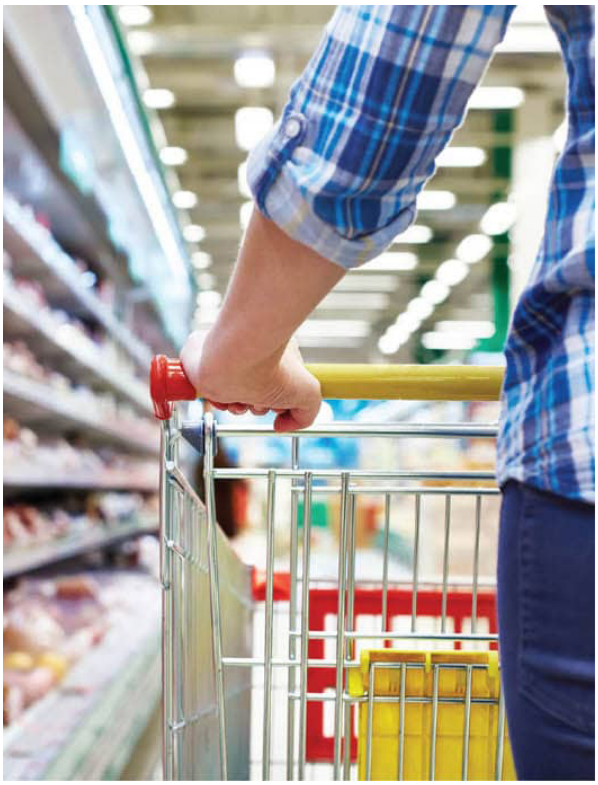
nature of the study that those devices be concealed. This kind of research can also be conducted in controlled laboratory settings — as is done in purchase labs, artificial environments in which research participants buy products. The use of purchase labs does, however, stray somewhat from tenets of traditional observational research, since participants do know that they are part of a study, which may influence their behavior.

When is it used?

Observational research can be used in a formative fashion before a hypothesis is established. Notations from this process provide valuable insight into the behaviors of the target audience. Assumptions derived from observational research should be used as part of a multilateral process of discovery. They can also be used to support design decisions, as a form of evidence.

Level of difficulty/complexity?

To be reliable and fulfill project objectives, the investigator must be trained to document his or her observations and must have a strong understanding of research goals. Observational validity may be higher in this case (compared with visual anthropology), as the researcher is not influenced by the subject's opinions. However, the investigator's personal bias still can skew the documentation. Another problem with this tactic is that only public behavior is visible. Individuals often behave differently in solitary or smaller group settings, and ethical considerations prevent hidden cameras from intruding into private scenarios. Observational research also rarely gives an indication of the true motivations driving the behavior being witnessed.





Observational research can be conducted in the subjects' normal environment or in specially constructed labs. For example, observation of consumers in retail environments may help provide insights into their shopping experience. However, when dealing with a rights protected group, such as children, laboratory settings may be more appropriate.

TACTIC:
PHOTO ETHNOGRAPHY

What is it?

Photo ethnography is a field exercise in which subjects are asked to record their daily experiences with still or video cameras. Participants capture their own behaviors, motivations, and attitudes by documenting them with images over an extended period of time. Researchers then combine individual case studies to form a larger understanding of the community being studied. This practice is similar to visual anthropology because both use visual media for interpreting cultural human behavior. Visual anthropology differs by placing the camera in the hand of the researcher rather than in the hand of the subject.

What can it do?

Photo ethnography can help illuminate the emic, or internal, perspective of the community or individual under study ("How do the elderly view themselves?"). Analysis of the collected images can provide the researcher with insight into the lives, needs, and motivations of the subject(s) and may also help identify ways to communicate with them.

How is it used?

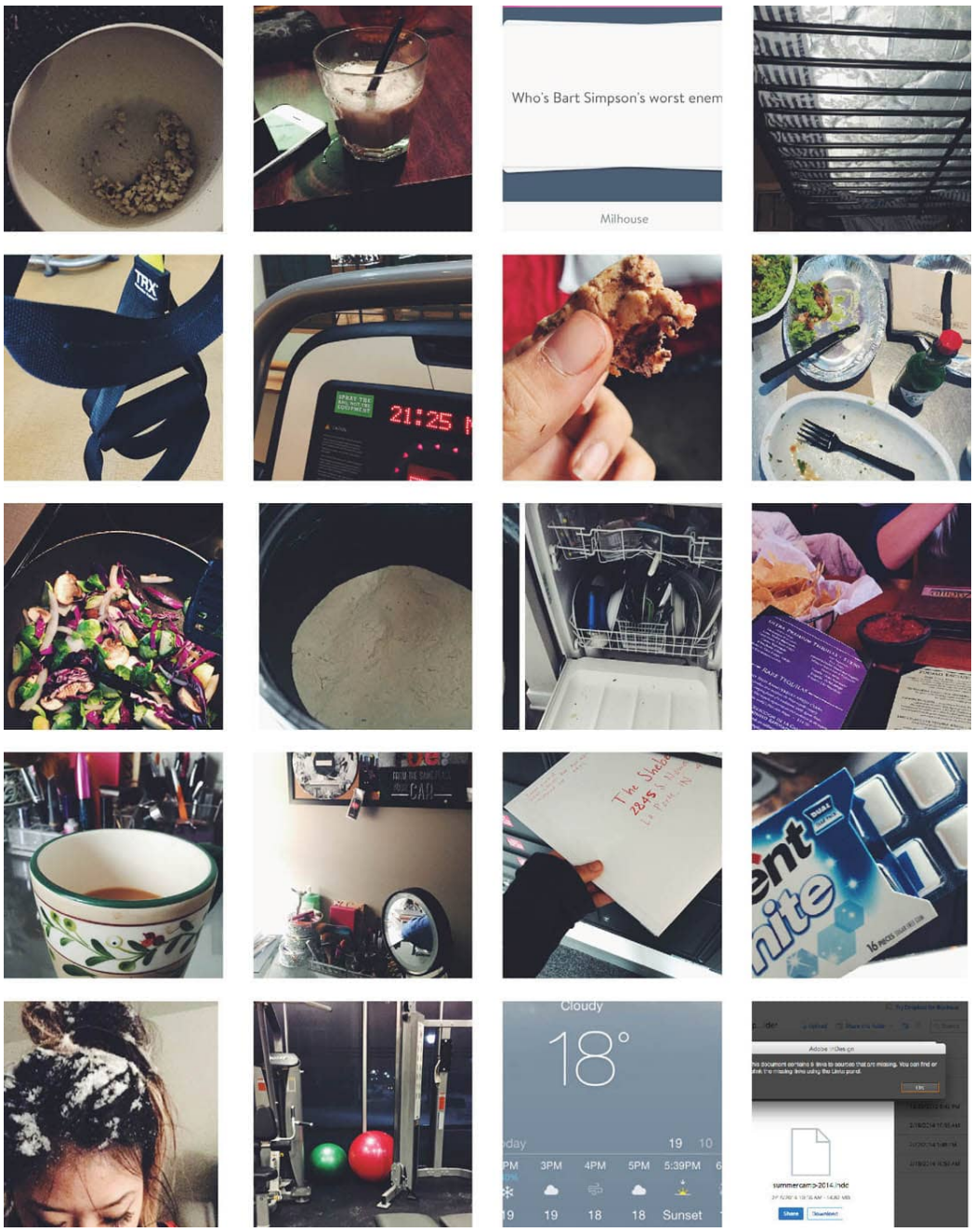
Photo ethnography should be a part of a larger research strategy and not a standalone exercise. As stated previously, ethnography is subjective and cannot be replicated, so other methods of data collection should be used to qualify the researcher's position.

When is it used?

Photo ethnography is often used as formative research, to help gain better understanding of the intended audience's needs and behaviors. This kind of study can be used as a method in problem solving or in problem identification.

Level of difficulty/complexity?

Before undertaking a photo ethnographic study, the researcher must first complete investigations to identify participants (also called informants) representative of the larger community. Some time will then be spent training those participants on image-capturing skills. (Training time will vary depending on skill; for example, operating a digital camera and uploading the collected files can prove complex for some participants.) Photo ethnography can be relatively inexpensive and places control in the hands of the subjects, essentially making them self-ethnographers. An added benefit of this tactic is the psychological buy-in created by involving the subject directly in the investigation. Conversely, problems with observational validity may occur because the participants are actively aware of what they are supposed to be cataloging and therefore may alter their "normal" behavior. Additional issues may arise if participants are not able to objectively select or capture images that accurately represent their larger community.



Students in Professor Sarah Rutherford's Human-Centered Graphic Design course at Cleveland State University conduct photo ethnography as part of a 48-hour self ethnography project. After research is complete, they must identify a problem or need in their lives and suggest a design-led solution.

▶ Description

TACTIC:
SELF ETHNOGRAPHY

What is it?

Self ethnography (also referred to as auto ethnography) is an investigative method where an individual documents his or her own experience, acting as both researcher and participant. In a design context, the researcher/participant engages in an activity specific to the intended audience in an effort to better understand the users' experience firsthand.

What can it do?

Self ethnography provides a personal lens into the world of the user. It allows the design team to familiarize itself with issues relevant to its audience, gained through primary interaction with the activities, products, or services under investigation. It is used to gain a deep understanding of specific experiences, and to look for ways to enhance or improve them. This first-person participation establishes a depth of empathy, revealing issues that may have gone unnoticed in other information collecting methods. Because the researcher is directed to be hyper-aware and document every detail, self ethnography can even reveal new insights in commonplace situations.

Self ethnography is a useful tool to kick-start the primary research phase of a project. It doesn't require the recruitment of prospective research participants, and the associated screening, scheduling and coordination related to other types of field research.

How is it used?

Information collected during self ethnography can take the form of field notes, user diaries, photography, and video, that can then be shared with the creative team for analysis.

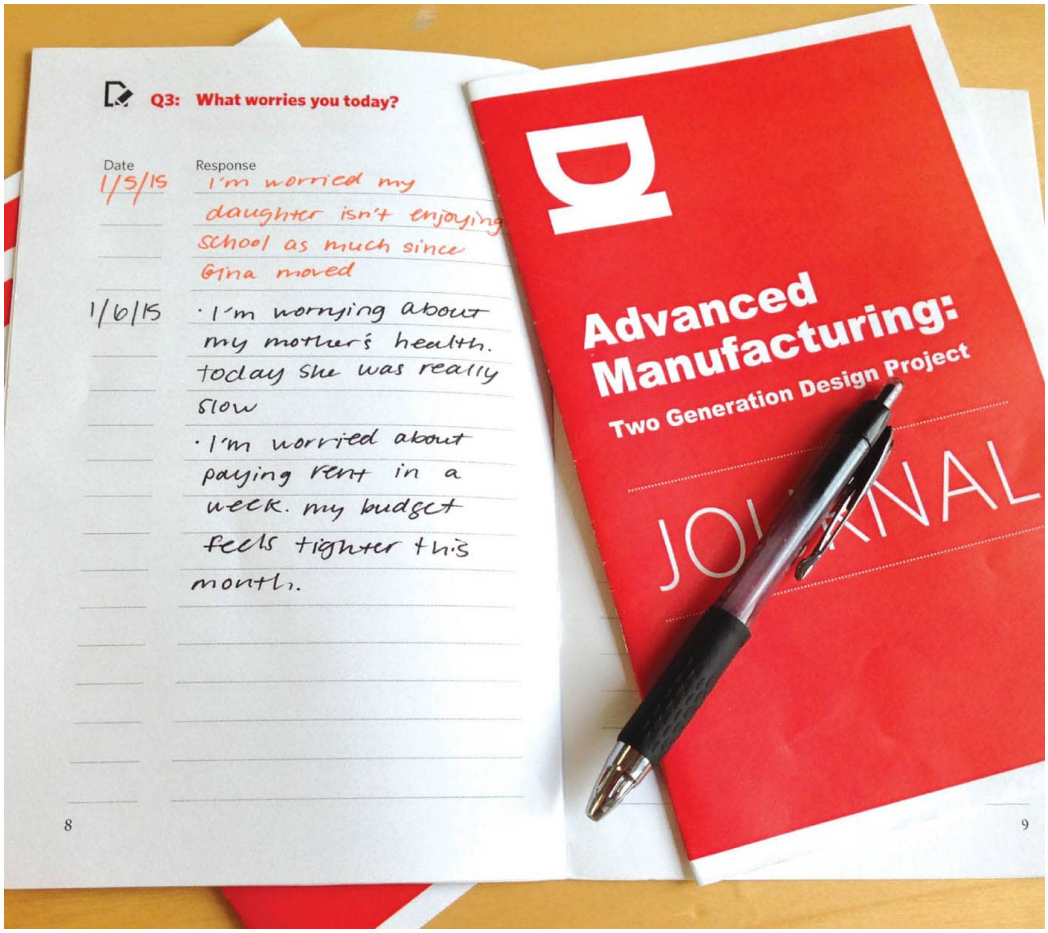
Like contextual inquiry, insights collected from self ethnography can be aggregated into experience maps, which document the activity from start to finish. Research gathered from multiple participants can be cross-referenced to reveal opportunities for design intervention. The assembled findings can be shared with project stakeholders and used to provide rationale for future decision making. (Read more about contextual inquiry on this page, and experience maps on this page.)

When is it used?

Self ethnography is used at the start of a project, helping to frame the design problem. Insights gained through the personal experience of self ethnography can formulate additional research questions and help plan subsequent research activities.

Level of difficulty/complexity?

Self ethnographic studies can be immersive, and require the researcher/participant to be reflective and honest about the experience. Repeating the experience, recording multiple rounds of observation and reflection, will provide more observational validity. Because self ethnography relies on an individual's perspective, if possible, assign more than one researcher/participant to collect data. Sending more than one person into the field provides a broader perspective of the experience being studied and accounts for personal biases.



Design Impact in Cincinnati, OH, uses ethnographic journaling as a tool for self-reflection. The journal shown here was part of a project focusing on removing employment barriers for women in manufacturing.

TACTIC:
UNSTRUCTURED INTERVIEWS

What are they?

Unstructured interviews are an information gathering tactic where the researcher allows the participant to guide the direction of the interview.

That is not to say that the interviewer doesn't do extensive secondary research on the area to be discussed! A list of topics to cover and a set of questions are prepared in advance. The goal of this tactic is to foster a comfortable rapport with the research participants, letting them openly describe their understandings, feelings, and interpretations in their own words.

What can they do?

Unstructured interviews allow the researcher to see through the eyes of the respondent, uncovering relevant information specific to that individual or group. They can reveal primary knowledge of the participant's beliefs, interests, and opinions. Often the information gathered was known only to the participant, so an unstructured interview may also reveal areas of opportunity for the project not previously imagined by the designer.

How are they used?

Use unstructured interviews to help frame a problem. The information gathered can determine project objectives or priorities. Here are some tips for successful interviews using this tactic:

- **Craft a plan.** Before the interview determine what kind of information you want to collect, and draft the questions that you want to cover — but be adaptable should the conversation go in different directions. Adhering to a list of questions too closely can impede the organic nature of the dialog.

- **Ask open-ended questions.** The structure of your questions should allow participants to answer in their own words. Avoid yes/no questions, or questions that can be answered in a single word.
- **Be persistent.** If a participant doesn't provide adequate feedback to a particular question, come back to it from another direction later in the session. If an answer is unclear, ask for clarification. When applicable, ask the participant to show you or teach you how to do something (even if you're already familiar with the task).
- **Use human nature to your advantage.** We're all uncomfortable with pauses in conversation. If you feel participants are not providing adequate feedback to your questions, don't say anything after their response. Be sure to look them in the eye and smile, but wait. Forcing them to fill the empty space can lead to richer answers.
- **Bring a friend.** Often, taking field notes while conducting the interview can be difficult because you're focused on two things at once. Bring along a partner to take notes and pay attention to body language so you can focus on the conversation. Afterward you and your colleague can compare impressions; two opinions provide more observational validity.

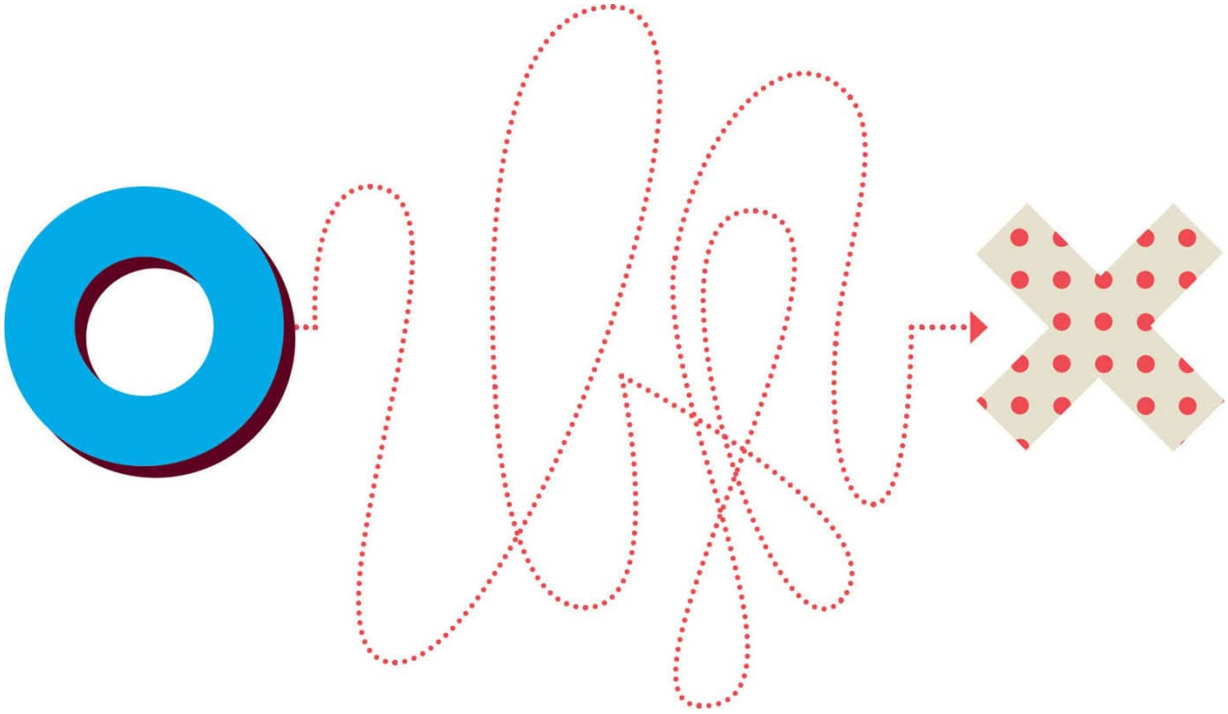
When are they used?

Unstructured interviews are a formative activity, generally scheduled at the beginning of a project to help establish context, confirm, or invalidate assumptions from secondary research, and reveal concerns relevant to the user. This tactic is particularly useful when engaging with a new experience, problem, or group of people.

Level of difficulty/complexity?

Conducting unstructured interviews is relatively easy, but does require some practice on the part of the interviewer. People skills are essential. The researcher needs to be comfortable with letting the participant lead the dialog. This may mean multiple interviews will be necessary to cover all areas relevant to your study.

UNSTRUCTURED **INTERVIEW**



Unstructured interviews allow the participant to drive the conversation, sometimes meandering into unknown areas. While more time consuming, the unstructured approach allows for deeper exploration of participants' unique perspectives — in their own words.

TACTIC:
VISUAL ANTHROPOLOGY

What is it?

Visual anthropology is another field research tactic that uses visual media to aid interpretations of cultural behavior. Visual anthropology differs from photo ethnography by placing the camera in the trained hands of the researcher rather than in the untrained hands of a subject. These investigations can help to illuminate an etic, or external, perspective of the community under study ("How are the elderly viewed by others?"). Visual anthropology may also include a review of cultural representation in areas such as performance, museums and cultural institutions, art, film, and mass media. In these cases the investigation provides a secondary emic perspective, answering a question such as "How do the elderly view themselves?" by reviewing artwork created by octogenarians, or films directed by Clint Eastwood when in his eighties.

What can it do?

Visual anthropology provides a collection of discernible samples that help the researcher gain insight into the common cultural understandings of the community being studied.

How is it used?

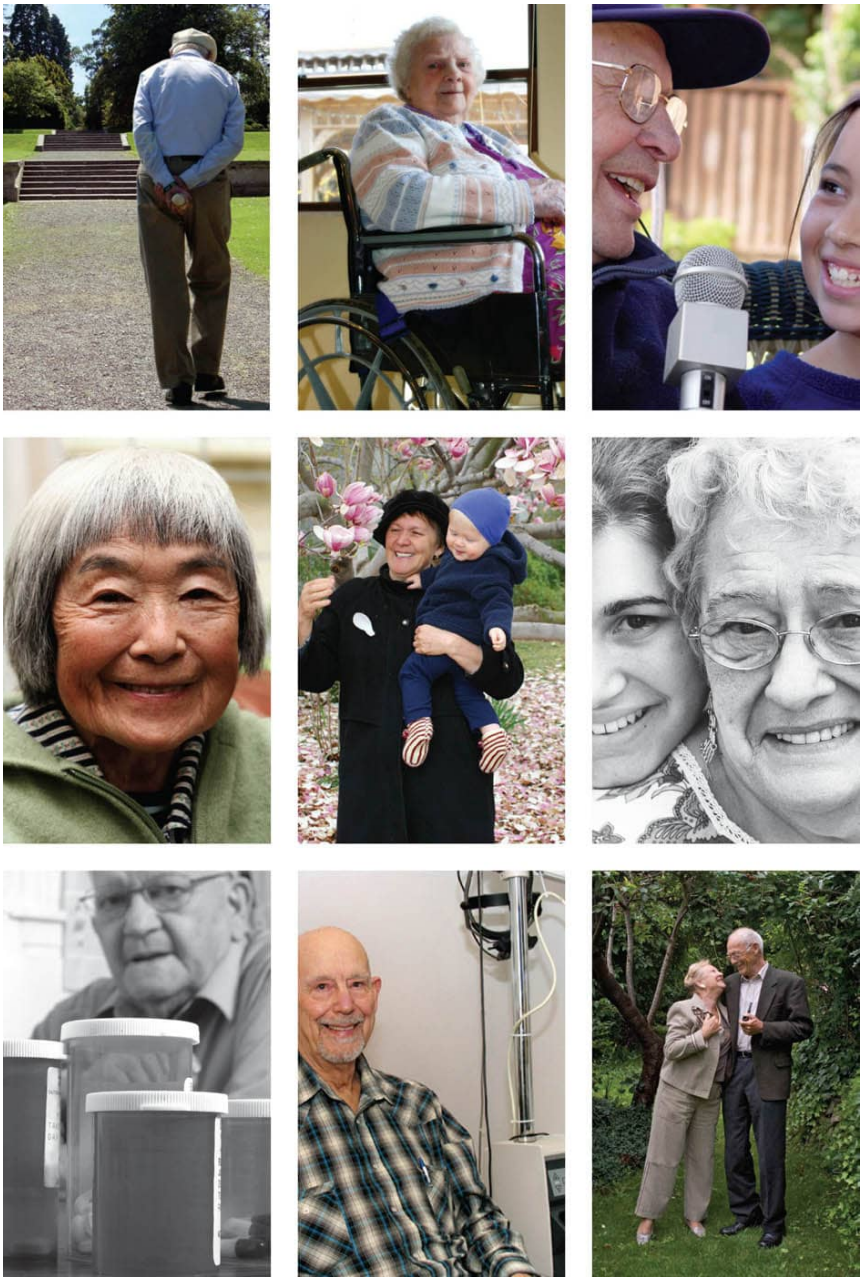
Use visual anthropology studies as a method of documentation, augmenting other ethnographic research practices to illuminate understanding of a target group.

When is it used?

Visual anthropology, similar to photo ethnography, is suited to formative research. Visual anthropology can help determine the behaviors, attitudes, and preferences of the target audience. Using visual anthropology as a tool may help the designer discover previously unknown factors. Information attained using this tactic can help define a problem or formulate a hypothesis.

Level of difficulty/complexity?

This method of documentation addresses the problems inherent in photo ethnography by placing the lens in the hands of a trained researcher, through whose objective vantage point the relevance of events and symbols are cataloged. However, issues of observational validity still occur because the subject is aware of being under observation and thus may not behave in a truly candid fashion.



Visual anthropologists can assess an external view of a specific group by examining how that group is represented in the media. For example, a quick scan of these images might indicate that perceived concerns of the elderly are retirement, grandchildren, and health care.

▶ Description

STRATEGY:
MARKETING RESEARCH

Marketing research and market analysis are two frequently confused terms. Marketing research is a form of sociology that focuses on the understanding of human behavior as it applies to a market-based economy. The term does not refer to a singular research method but rather a multilateral strategy used to describe a broad sampling of research practices surrounding consumer preferences.

TACTICS COVERED:

Demographics + Psychographics
Focus Groups
Surveys + Questionnaires

RELATED:

Contextual Inquiry
Observational Research
Unstructured Interviews
A/B Testing
Card Sorting
Personas

Market analysis, in contrast, is a quantitative business tool that measures the growth and composition of markets or business sectors. Market analysis considers elements such as interest rates, stock performance, price movements, and other measurable statistics that define the financial climate in which a business operates.

For example, a manufacturing company might commission a market analysis to determine trends in outsourcing fabrication to foreign countries to help advise an appropriate location for its next assembly plant. In this instance, that same manufacturing company might commission marketing research to determine the opinions of consumers regarding the need for a new version of a classic product. Would a new version be covetable? Would a new version replace the classic model, or is there enough consumer loyalty to support both?

Marketing research can be used to gather information about any number of marking related issues, including new product launches, brand equity, consumer decision-making processes, the effectiveness of advertising, and even leveraging against competitors.

Depending on the question being asked or the issue under investigation, marketing research can be either qualitative or quantitative as well as formative or summative. Qualitative practices may include such tactics as focus groups, interviews, or other observational techniques. This approach often samples randomly from a large population, conducting surveys or distributing questionnaires that are then statistically scored. In an exploratory (formative) role, marketing research can be used to determine an area in need of investigation: Would the market support an offshoot of this brand specifically targeted at teenagers? In a conclusive (summative) role, marketing research can be used to better understand such things as the effectiveness of an advertising campaign or consumers' opinions regarding new or existing brands

and products: What were teenagers' new brand perceptions, and did they prefer the original?

As with all well-designed research plans, the results yielded by marketing research are the most accurate when several different tactics are used to inform a conclusion, rather than depending on one tool to determine the results.

TACTIC:
DEMOGRAPHICS

What are they?

Demographics are collections of statistical data that describe a group of people or a market segment. Demographics generally include information on a variety of quantifiable cultural, economic, and social characteristics.

What can they do?

By grouping people into segments based on demographic variables, researchers can use the collected data to create hypothetical profiles. This research tactic can provide insight regarding what groups of people are doing, thinking, or buying. Common demographic variables include age, gender, sexual orientation, household size, personal income and family income, education, race, and religion.

How are they used?

Researchers study demographic data to clarify their understanding of the needs and motivations of individual market segments.

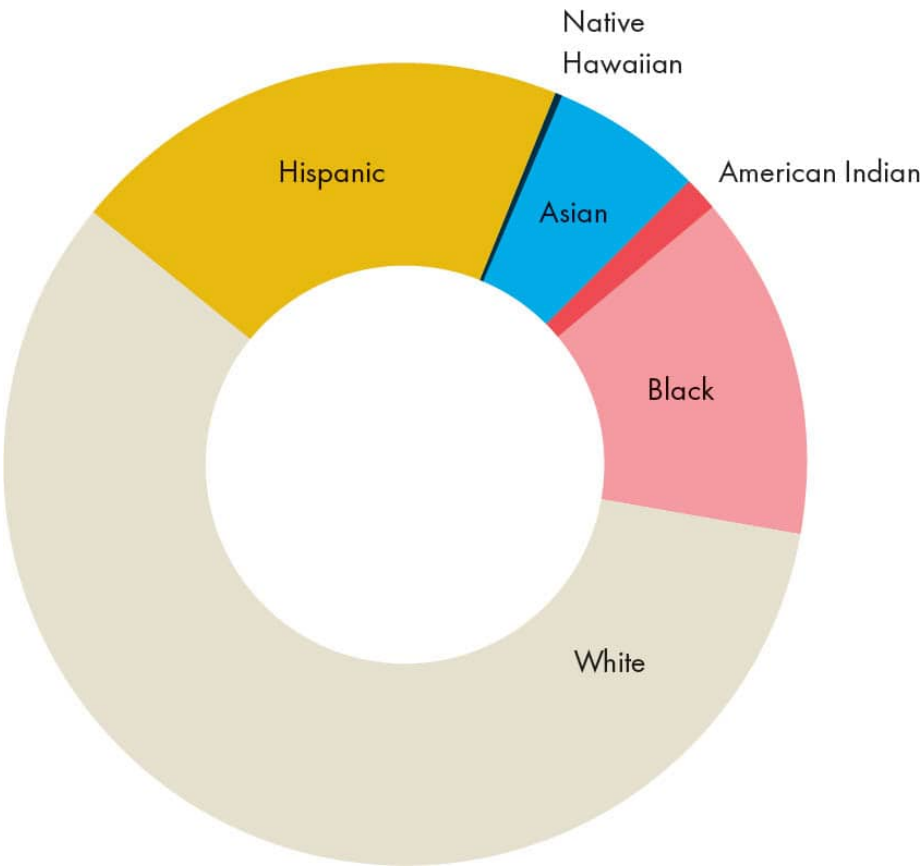
When are they used?

Demographics provide formative information and therefore should be used at the start of a project to define an audience.

Level of difficulty/complexity?

Marketing research firms can be hired to conduct primary demographics using proprietary resources and software. In addition, access to demographic information collected by both for-profit and nonprofit organizations is widely available as a form of secondary research. It is important to note that demographic profiling often makes broad generalizations about groups of people that do not account for the unique qualities of individuals — who may not always behave in the predicted fashion.

U.S. **RACE + ORIGIN**



Demographics collects information from objective data. For example, this chart shows the macro breakdown of race and origin of the U.S. population from information collected by the 2020 U.S. Census.

▶ Description

TACTIC:
PSYCHOGRAPHICS

What is it?

Psychographics are a quantitative tactic used to measure subjective beliefs, opinions, and interests. In other words, this tactic is a quantitative tool for measuring qualitative information. Similar to demographic research, which gathers data on age, gender, race, and other factors, it instead counts information about opinions, religious beliefs, music tastes, personality traits, and lifestyles.

What can it do?

Psychographics can help the researcher gain valuable insight into the opinions and preferences of the groups being studied.

How is it used?

Use psychographics in a manner similar to the way you'd use demographics, keeping in mind that psychographics measure inherently subjective data. This research tactic, whether employed in a primary or secondary fashion, will help you clarify a creative approach by illuminating a target market's opinions and preferences.

When is it used?

Psychographics can be used for problem identification or problem solving. It is best used in the early phases of the design process in conjunction with demographic research, ethnographic research, and personas.

Level of difficulty/complexity?

Most designers outsource primary psychographic studies to marketing research firms who specialize in the process. Often these are undertaken in conjunction with demographic investigations of the same group. Secondary psychographic data may be more readily available and thus more cost effective, but, as previously noted, will not be customized to the target market.

DEMOGRAPHIC	PSYCHOGRAPHIC
Age	Values
Gender	Lifestyle
Race	Attitudes
Location	Beliefs
Income	Interests
Education	Opinions

Though demographic and psychographic research may seem similar, psychographic research attempts to quantify subjective information, such as opinions, beliefs and lifestyle choices.

TACTIC:
FOCUS GROUPS

What are they?

Focus groups are a social science tool used prevalently to conduct market research. Focus groups are organized discussions with a limited number of participants, led by a moderator. The goal of these discussions is to gain insight into the participants' views about a given topic. Unlike survey research, which is primarily quantitative, focus groups are qualitative exercises because they allow the researcher to understand the opinions and attitudes of the respondents. This type of research is different from the similar methods of one-on-one interviewing and group interviews, as it allows for interaction among the participants.

What can they do?

Focus groups allow for interpersonal communication and interaction between participants. This kind of dialogue can lead to new topics of discussion originally unforeseen by the researcher. Additionally, participants know that their opinions are valued, or that they are considered experts — leading them to feel ownership of the process and provide possible solutions. Also, focus group research can be done relatively quickly without huge demands on time and fiscal resources. Qualitative in nature, focus groups don't require the same number of participants/responders as survey or poll research and can therefore be assembled and evaluated in a more timely fashion.

How are they used?

Moderating the session well is key to collecting viable data. It is important to make sure that participants stay focused on the questions asked, while giving them room to deviate should new issues arise. All participants must also feel that they are being engaged by the group and feel comfortable enough to participate in the discussion. Most important, the moderator must stay neutral so that he or she does not ask leading questions that might skew participant responses.

Focus groups usually consist of six to ten people. If the group is too small, the conversation may lag or be dominated by a few individuals. Conversely, if the group is too large, discourse may become too difficult for the moderator to facilitate. Large groups may also lead to distracting side discussions among respondents or cause some participants not to engage in the dialogue at all.

Individual background is an important consideration when selecting participants. It is essential to choose people with similar characteristics, backgrounds, or interests so that they feel comfortable talking to one another. If respondents are on the opposite ends of an issue, the conversation can become heated, preventing a free exchange of ideas. Depending on the subject, several focus groups may have to be held in order to get a representative view of the issue. People also feel more comfortable sharing their opinions with people they don't know, so limit focus groups to individuals that have no prior history with one another.

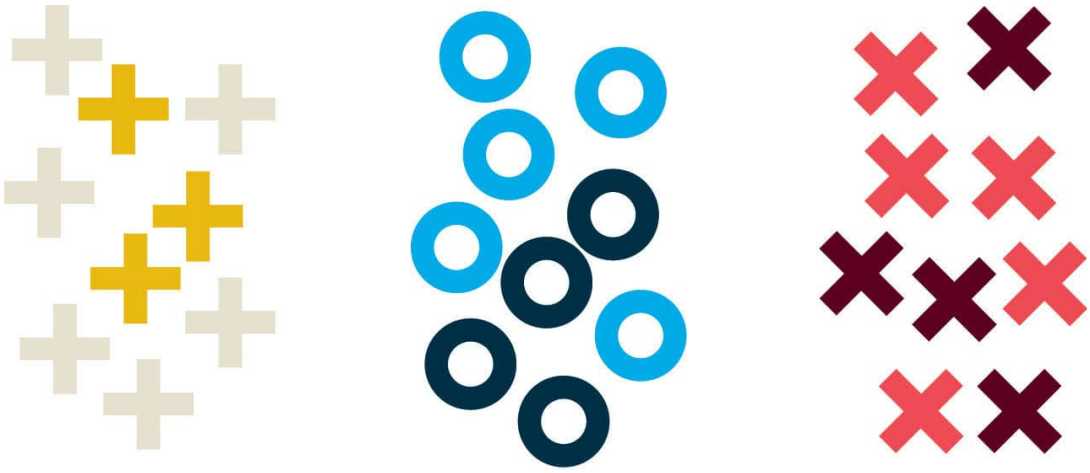
When are they used?

Focus groups can be formative or summative depending on the nature of the design problem that they are addressing. This research tactic can be used to collect new information before a project starts. Or at key points during an iterative creative process to get feedback from potential users in order to refine prototypes. (More on iterative design). As summative evaluation, focus groups can be used to assess the acceptance of a new campaign or gauge customer satisfaction levels.

Level of difficulty/complexity?

Though focus group research has many benefits, there are a couple of potential conflicts to take into consideration. As with most group dynamics, dominant personalities may sway the opinions being expressed in a certain direction. Careful selection and good facilitation on the part of the moderator can help circumvent this issue; therefore hiring or assigning trained moderators is a good investment in the success of the survey. Additionally, the results of focus groups are based entirely on the assumption that the people participating are being totally honest. Often, what people say they do is radically different from what is really happening. Preparing for these scenarios, and supplementing focus group research with other forms of information gathering, will lead to more accurate results.

FOCUS GROUP **DYNAMICS**



Group 1 Group 2 Group 3

While diversity of opinion is essential to focus group research, to ensure a free-flowing dialogue among participants, be sure to group together 6–9 people who have similar experience. Radically divergent opinions can create conflict. To ensure validity of your findings, conduct more than one focus group, each representing a different type of end user.

TACTIC:
SURVEYS + QUESTIONNAIRES

What are they?

Survey research is a tactic for collecting quantitative information by asking participants a set of questions in specific order. Questions are administered to a sample of individuals, representative of a larger population. If a researcher administers the questions, it is called a survey or structured interview. If participants answer questions on their own, either online or by filling out a piece of paper, it is called a questionnaire.

What can they do?

Surveys and questionnaires can be used to collect information about the opinions and preferences of a defined group, or to collect factual information, such as a census report. These investigations give the researcher the ability to collect large amounts of information from a wide population in a relatively short amount of time. Questions should be written and structured in ways to increase the reliability of valid findings; therefore, trained experts are the best resources for developing this content.

How are they used?

Use surveys and questionnaires to gather demographic (fact-based) or psychographic (opinion-based) data.

When are they used?

Use surveys as formative research, to gain insight into the opinions and desires of the target audience. This information can then be used to guide design decisions during project development. It can also be used as summative research, to support or confirm creative solutions, or to understand the effects of a creative campaign. For example, a group of frequent online shoppers may be asked to fill out a questionnaire regarding new features just added to the website they are using. Responses can be used to determine whether users are satisfied with or confused by the new tools.

Level of difficulty/complexity?

Survey research can be a cost-effective tool for gathering information from a large population, and there are many companies and organizations that can be retained to help construct and administer questions. Because of the complex structure, writing, and scoring inherent in survey research, working with a specialist will help increase accuracy — missteps along the way can lead to invalid results. However, if there is no budget for outsourcing, tremendous amounts of information are available in the public domain to help guide the process.



Survey research transforms individual responses into actionable insights. Patterns in the data help designers understand user preferences and make evidence-based decisions.

STRATEGY:
USER EXPERIENCE

User experience employs a broad range of techniques designed to measure a product's ability to satisfy the needs of the end user (accessibility, functionality, ease of use) while also meeting project requirements (budget, timeline, technical constraints).

TACTICS COVERED:

A/B Testing
Analytics
Card Sorting
Eye Tracking
Paper Prototyping
Personas

RELATED:

Contextual Inquiry
Observational Research
Unstructured Interviews
Focus Groups
Surveys + Questionnaires

The research methods employed in UX are most commonly used when designing digital products, apps, and websites, but many of the

concepts can apply to any product intended for human use — whether physical or digital.

Usability in interactive and web design has been linked to several key performance indicators:

- **Staying under budget:** User testing in the early stages of development, as formative research in an iterative design process (more on iterative design), helps ensure that usability issues are identified before the project moves to production. Correcting problems after launch can cost significant time and money.
- **Better outcomes:** Products designed with user-testing practices provide positive experiences, leading to higher customer satisfaction, increased engagement, and stronger brand associations. For commercial projects, this can translate to increased sales and lower support costs.
- **Reduced risk:** Testing with real users reveals problems that internal teams might miss, reducing the risk of launching a product that doesn't meet user needs.

Testing Environments

Many corporations and universities have labs designed specifically for usability testing. User participants are asked to complete a set of "tasks" — for example, find specific information, complete a purchase, or navigate to a particular feature. They are not given step-by-step instructions, so the environment mimics a typical user experience. Participants may be timed throughout the process and observed through one-way mirrors. Some labs use eye-tracking technology that records, in real time, where a user's eyes focus as they navigate content on screen. This data reveals which elements attract attention and which are overlooked, providing insights that mouse-tracking alone cannot capture. Though detailed lab studies can be expensive, they often provide invaluable insights for complex products.

Remote + Informal Testing

Not all usability testing requires specialized labs. Remote-testing tools allow researchers to observe users in their natural environments, often at lower cost and with greater geographic diversity. Informal "guerrilla" testing — quick sessions conducted in public spaces or through existing networks — can provide rapid feedback during iterative design. The method chosen depends on project scope, budget, and the questions being asked.

TACTIC:
A/B TESTING

What is it?

A/B testing evaluates two different design solutions, testing each with a unique group of users to measure feedback and responses. Subsequent comparison of the feedback collected from both groups helps determine which iteration is more successful.

What can it do?

A/B testing allows for comparative analysis of design solutions. In some scenarios, testing proposed designs against existing collateral allows the creative team to gauge the effectiveness of new aesthetics or concepts. It can also be used to evaluate or update specific components of a design, such as changing navigation, or adding new features or tools. For web and app projects, A/B testing can be done while a site is live, redirecting some users to option A and others to option B, collecting actual user data over a period time for analysis.

How is it used?

A/B testing can be used as part of any research plan, but is most commonly associated with user experience design projects. This process can help evaluate the success of design iterations or address specific, documented usability issues. In these instances it's important to test incremental change, to determine how minor variations in design influence user feedback. It is difficult to determine which variable a user is responding to when radical changes are shown. Feedback is only valid if the test group resembles the intended target audience.

When is it used?

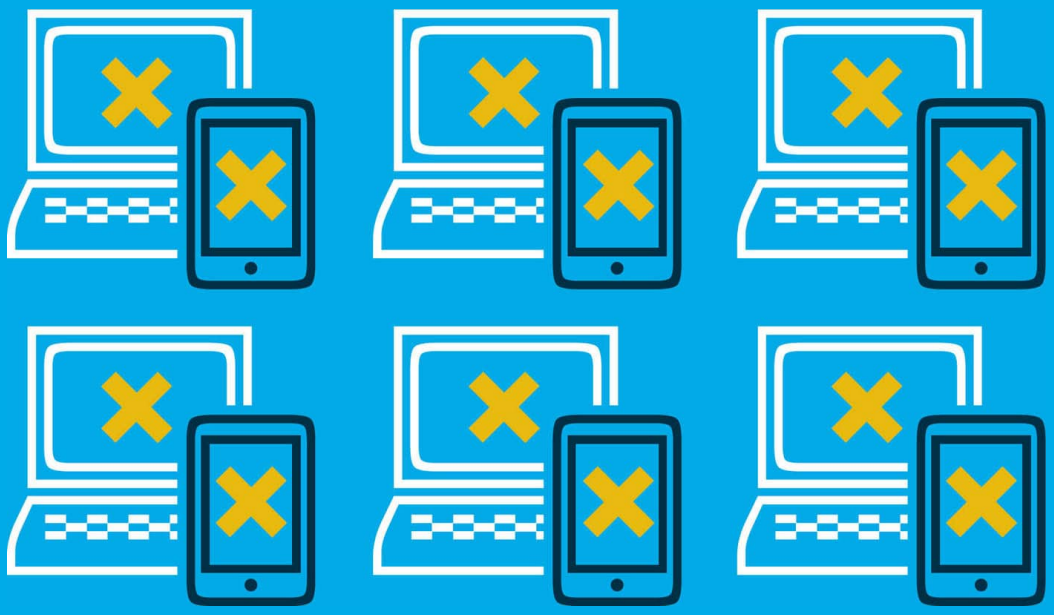
Use A/B testing to evaluate new concepts, address existing problem areas, or assess proposed changes. The process produces insights before costly, time-intensive development phases begin.

Level of difficulty/complexity?

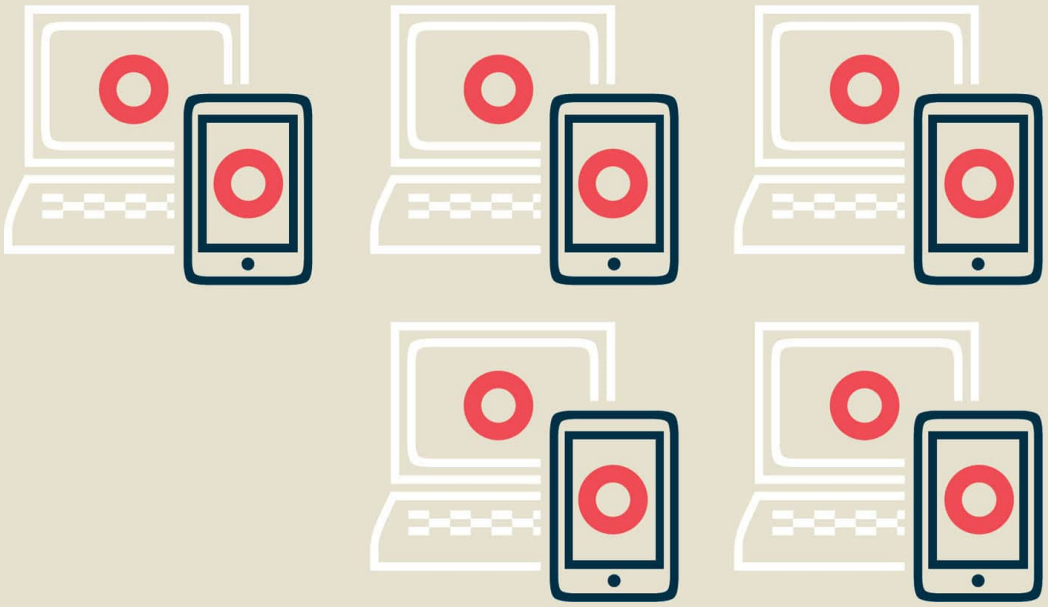
On a basic level, A/B testing can be done quickly and inexpensively on any type of design project by establishing a "control" to test against (often an existing design), and developing the parameters for assessment (ex: Does new photography improve the experience?). When A/B testing, it is essential to establish a clear, specific question that can be answered through the testing process. If this is not defined, iterations might continue indefinitely.

Digital tools can help plan and execute A/B testing, measuring actual behavior — task completion, engagement — not just opinions. Multivariate testing can evaluate multiple changes simultaneously, though it requires larger sample sizes and more analysis.

TESTING GROUP **A**



TESTING GROUP **B**



During AB testing two different design solutions are tested, each with a unique group of users. The research team then performs a comparative analysis of the results to determine which design is more successful, relative to project goals.

TACTIC:
ANALYTICS

What are they?

Analytics, sometimes referred to as web statistics or usage metrics, are a form of quantitative analysis that uses concrete metrics to track user behavior online. A designer can gain valuable insight into the users' needs and interests by measuring key variables through the course of a user visit.

What can they do?

Analytics can provide the designer with a lot of information about users' viewing habits. For example, a designer can tell where users have come from (both via geographic location and via referring web domains); which pages are being visited most; how long users are staying on those pages; how long they stay at the site as a whole; at which times of day people are looking; and the bandwidths they are using to connect. These statistics may help the designer when thinking about where and when to run ads, whether the site is being viewed at work or at home, and can also help inform future technical considerations such as the use of video or complex interactive features.

How are they used?

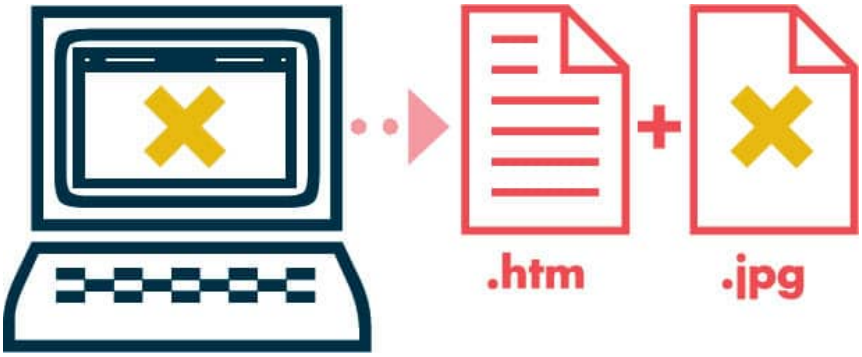
Looking at technographic data for the first time can be daunting. Listed below are some of the basics to get you started:

- **Page Views:** Page views indicate how many individual pages users have requested. This metric helps designers understand which content attracts the most attention and where users spend their time.
- **Visits/Sessions:** A visit, or session, is the period of time that a user spends on a website during a single browsing period. When the number of visits are totaled over time, the amount of traffic to the site can be determined.
- **Unique Visitors:** This term refers to individual users who visit a website within a specified period of time. Analytics platforms can differentiate between onetime visitors and

returning visitors. This information helps designers understand whether content attracts new audiences or builds loyalty with existing ones.

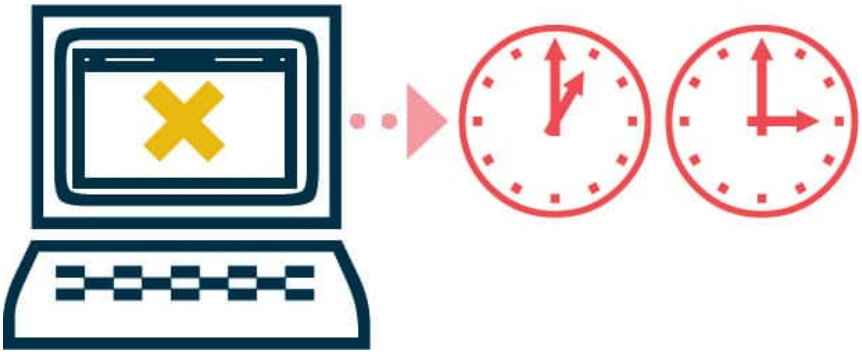
- **Traffic Sources:** Analytics can show how users found the site — through search engines, social media, direct links, or other websites. Understanding traffic sources helps designers and marketers determine which channels are most effective.
- **Device Type:** Analytics reveal whether users are accessing content on desktop computers, mobile phones, or tablets. This information is critical for responsive design decisions and mobile optimization.
- **Engagement Metrics:** Beyond simple page views, analytics can track how users interact with content — how far they scroll, which elements they click, and where they abandon the experience. These metrics reveal what captures attention and what causes frustration.

PAGE **VIEWS**



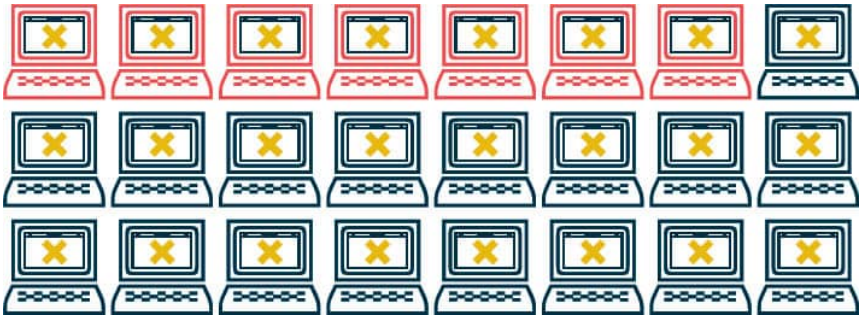
Page Views: A measure of how many times a single "page" has been viewed.

VISITS/**SESSIONS**



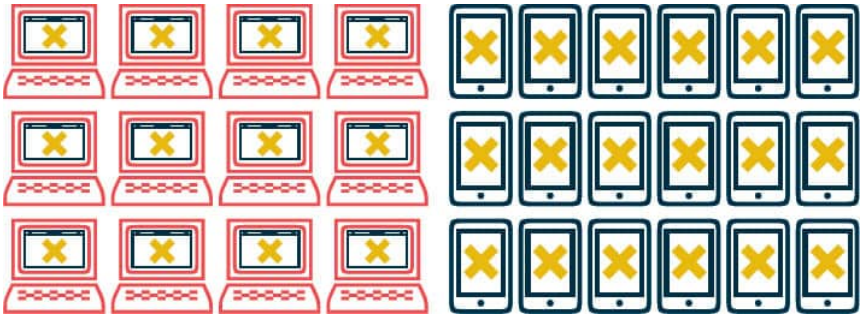
Sessions: The amount of time a user spends looking at a single page.

VISITORS/**UNIQUE VISITORS**



Visitors: Differentiating new users from those who frequent regularly.

DEVICE **TYPE**



Device Type: Shows what device users are using to access content.

When are they used?

Web analytics can produce formative and summative data. In a formative role, they can help the designer understand which features or content users find valuable in a current design. This information can then direct future iterations. In a summative role, they can tell the designer whether a redesign has increased visits, or whether a new feature is being used.

Analytics raises important privacy questions. Many regions now require user consent before collecting data. Designers should use privacy-focused approaches that respect user autonomy while still gathering valuable insights.

Level of difficulty/complexity?

Hosting providers for websites often supply web analytics software. Often the tools provided go far beyond these basic functions and include features that indicate the user's platform, bandwidth, peak usage hours, and even location. More comprehensive web analytic studies can be outsourced to companies that specialize in evaluating this type of data. Those firms have developed proprietary tools that go beyond what a web hosting company can provide. While this information may seem to be web-centric, the information gathered from web metrics can also help inform broader campaigns by indicating which types of information interest users and where users are geographically clustered.

TACTIC:
CARD SORTING

What is it?

Card sorting collects feedback about information architecture by allowing participants to organize content in hierarchies that make the most sense to them. Subjects are given numbered cards, representing content, and asked to structure that information in a logical sequence. Each sort can be recorded, providing measurable data for the design team. While the sorts are scored, they measure subjective opinions, making it a qualitative exercise. Card sorts can reveal audience preference for different types of content, methods of communication, features, tools, or even ideas.

What can it do?

Card sorting helps establish logical hierarchies of information, and identify user preferences and priorities. It's also a simple way to engage an audience, allowing them to create structures that are meaningful and relevant to them. That's why this method is also useful when engaging new clients or starting new projects. Performing sorts with key stakeholders can help everyone agree on the relative importance of project goals. In this context, card sorting is used as a communication tool and consensus builder between designer and client.

How is it used?

There are three ways to approach card sorting:

Open Sort — Subjects are presented with randomized cards then asked to organize them into representative groups, labeling the resulting clusters in their own words. Participants are asked to group like cards and structure hierarchies. In some cases, blank cards are provided for adding information to the deck. Open card sorts tell researchers how people organize and label information, and/or how they prioritize content, functions, and features.

Closed Sort — Subjects are given cards and asked to place them in categories predetermined by the design team. Closed sorts confirm the findings of previous open sorts and other research methods. They can also be helpful integrating new content or tools into existing designs.

Hybrid Sort — Subjects are given some predetermined categories but can also create their own. This approach combines the structure of closed sorts with the flexibility of open sorts, and it can be useful when expanding existing information architecture.

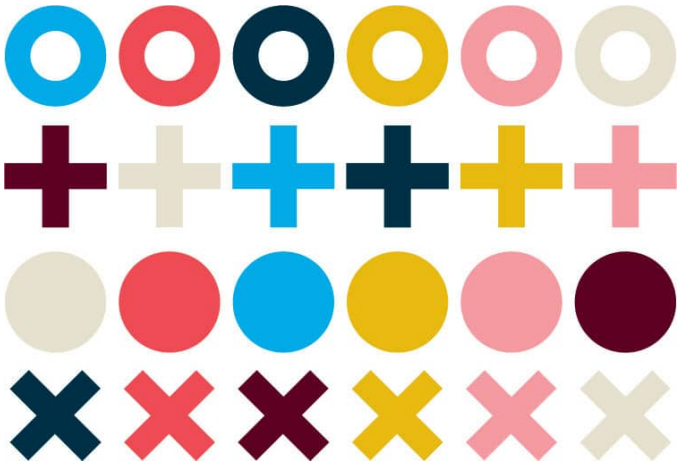
When is it used?

Card sorting is a formative tool. Use it early in your process to clarify areas of uncertainty or confirm original assumptions. When conducted in person, this method is especially valuable because it helps begin a dialog between the creative team and their audience. Researchers can ask why decisions are being made, and encourage the participant to expand their discussion beyond the cards provided.

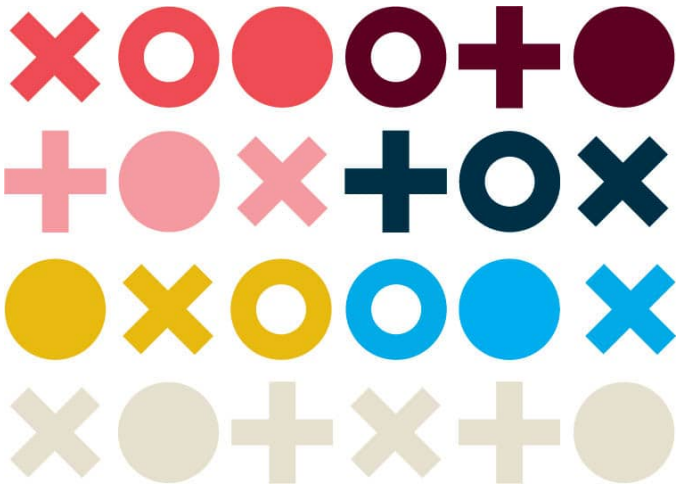
CARD **SORTING**



ARRANGEMENT BY **SHAPE**



ARRANGEMENT BY **COLOR**



Card sorts allow subjects to organize information into hierarchies based on their own views, preferences, or experiences. This simplified example shows a sort by color and shape. The key is to allow users to organize information in ways that are meaningful to them.

▶ Description

Level of difficulty/complexity?

Card sorting is approachable. It's often done by hand with simple tools like sticky notes or index cards. Digital platforms allow you to create virtual cards for users to manipulate, automatically tallying data and presenting visualizations. Digital tools also enable remote card sorting with geographically distributed subjects.

Card sorts require interpersonal communication skills, as you may need to engage participants similar to conducting interviews or facilitating focus groups. Bring another researcher to make observations and take field notes. Often the cards' content becomes a discussion prompt, and that partner can help make sense of unplanned interactions.

Card sorts typically require fifteen to thirty participants for meaningful patterns to emerge, though smaller numbers can provide valuable directional insights during early design phases.

TACTIC:
EYE TRACKING

What is it?

Eye tracking studies the movement, pattern, and duration of the human gaze.

Even when we feel like we're in a staring contest, our eyes are in a constant state of motion. These rapid micro-movements allow the brain to capture sensory data, seamlessly stitching innumerable images together to help us visualize the world around us. Behavioral scientists and psychologists divide these eye movement into three distinct activities: fixations, saccades, and scanpaths.

- **Fixations** occur when our eyes appear to pause,
- **Saccades** are the movement between two fixations,
- **Scanpaths** are the accumulation of a series of fixations and saccades.

Eye tracking research can be conducted using specialized equipment in laboratory settings or, increasingly, through webcam-based tools that make the technology more accessible. In traditional lab settings, a safe infrared light source is directed toward a subject's pupils while a high-speed camera captures the reflected light, recording eye movements across the screen. Webcam-based eye tracking uses similar principles but trades some precision for greater accessibility and lower cost.

What can it do?

Eye tracking equipment can determine the location and duration of each individual fixation, the subsequent saccades between them, and the length of the total scanpath. This allows the researcher to ascertain what participants are looking at, the order in which they view information, and how long their gaze lingers on specific details.

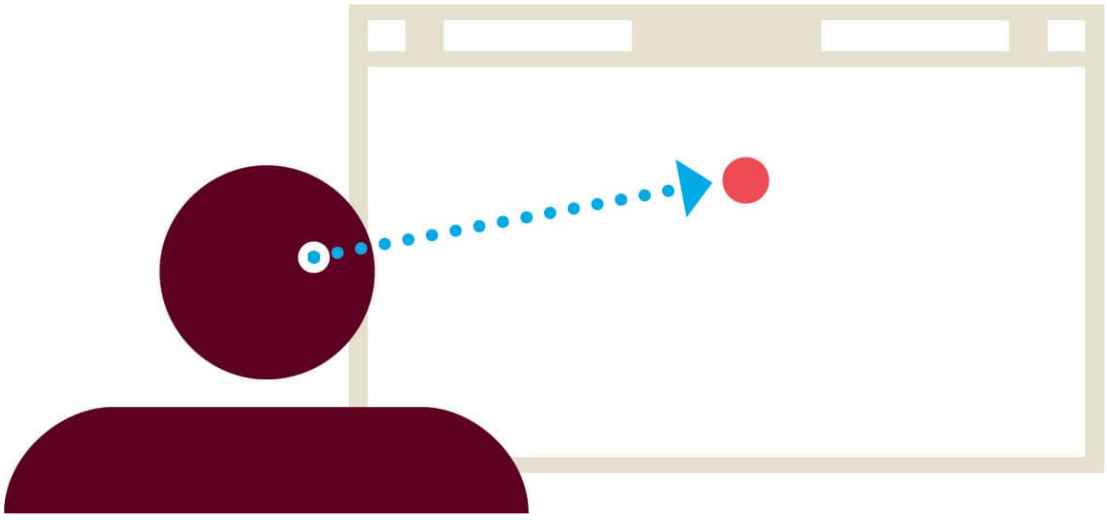
Each participant's test can be documented. The results of multiple tests are often compiled into visualizations such as heat maps, gaze

plots, or opacity maps. Heat maps use color gradients to show where multiple users looked most frequently and help triangulate multi-user data, removing the outliers and identifying common movements. Gaze plots show individual user paths through sequential numbered fixations. Opacity maps reveal what users didn't see by showing areas that received little or no attention.

How is it used?

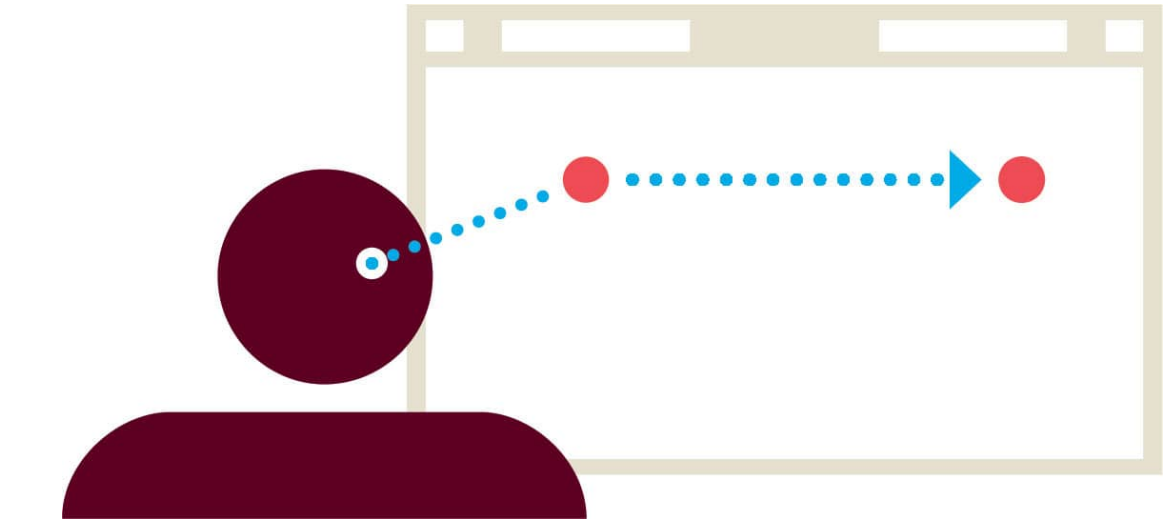
Eye tracking is a component of usability studies for digital interfaces, undertaken to evaluate page layout or interface design. Each participant's eye movements can be followed in real time. This means eye tracking can can help researchers understand the way users visually process hierarchies of information, how long it takes them to perform specific tasks or find distinct content.

FIXATION



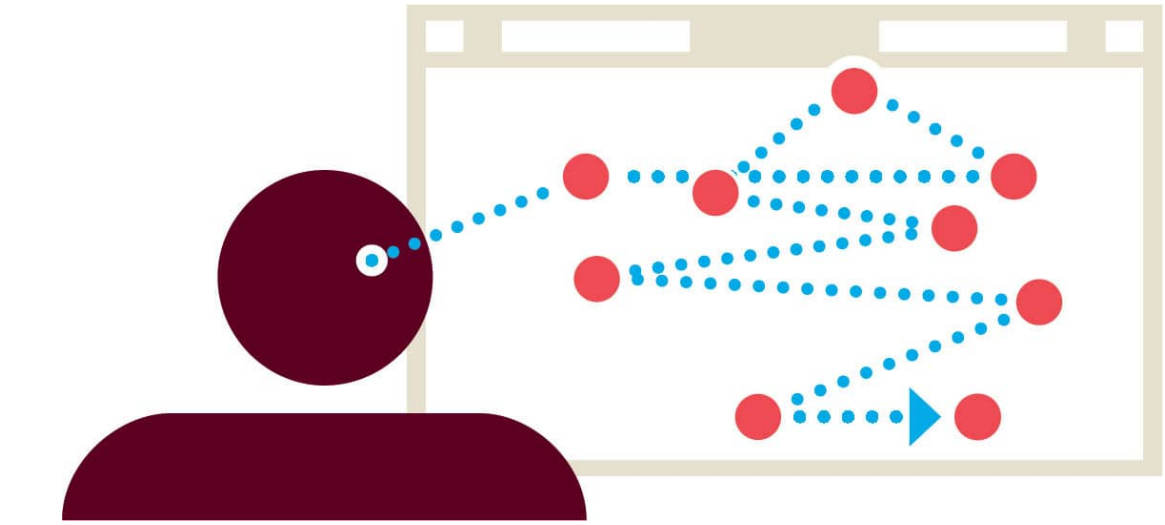
Fixations occur when the eye appears to stop or pause.

SACCADE



Saccades are the paths that connect two fixations together.

SCANPATH



Scanpaths are the total collections of a series of fixations and saccades.

Eye tracking allows the research and design team to literally see through the eyes of the user. It documents how much time they spend reading content or how rapidly they jump from one area to the next — ultimately determining the success, or failure, of page structure.

When is it used?

Eye tracking is often used as a part of the diagnostic process when usability issues arise. For example, if users are consistently having trouble performing a specific task, or they are overlooking key page elements or navigational items, eye tracking can tell us what they see and what they overlook. It can also tell us if fixations and saccades move in a logical way, mirroring page structure, or if they are scattered, potentially indicating that the user may be having difficulty with the layout of information. Measuring the length of scanpaths can help optimize productivity. Shorter and more direct scanpaths may indicate information sets are easy to navigate and hierarchies easily understood, where long scanpaths may imply a less efficient structure.

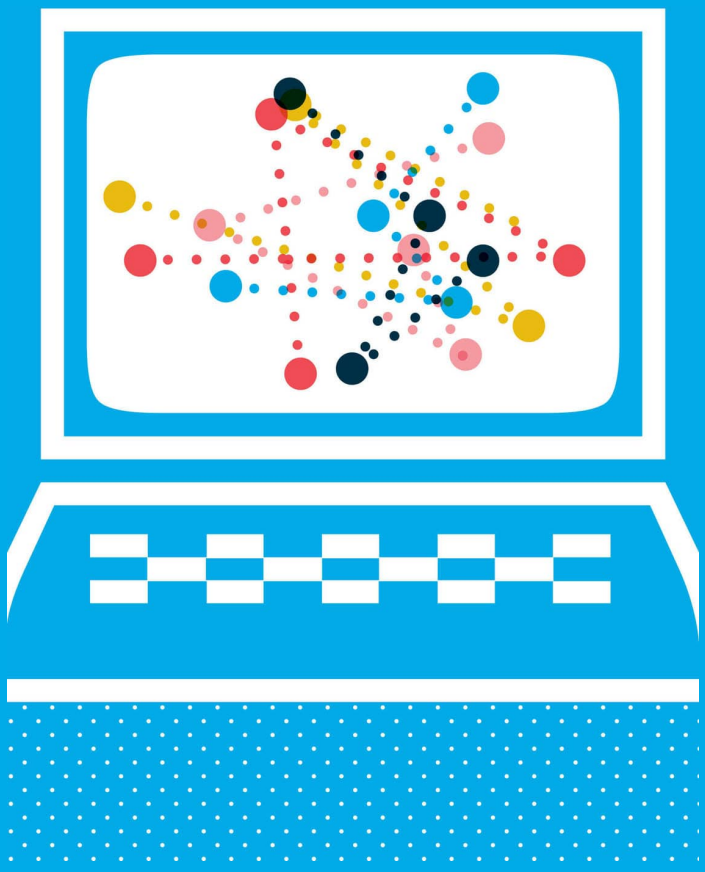
Level of difficulty/complexity?

Eye tracking ranges from accessible to specialized, depending on the precision required. Webcam-based tools have made basic gaze tracking available to smaller teams and tighter budgets, though they sacrifice some accuracy compared to laboratory equipment. More sophisticated studies requiring high precision may still need specialized equipment and outside resources, adding time and cost.

Eye tracking provides a quantitative analysis of user behavior, because each participant's experience is measured and recorded — but it may not always tell the whole story. One complication is that eye tracking only records the path of a participant's direct line of sight, not accounting for peripheral vision. And while the process can show us what the user has been looking at, it doesn't tell us why.

Eye tracking should be used in conjunction with other forms of qualitative testing, such as interviews and contextual inquiry, to establish a broader awareness what users see, value, and understand.

HEAT **MAPS**



Scanpaths from multiple users can be recorded and then superimposed to create heat maps, documenting the areas of the page most commonly viewed.

TACTIC:
PAPER PROTOTYPING

What is it?

Paper prototyping is a low tech — even no-tech! — process of testing digital and interactive experiences before programming or development occurs. Users are shown sketches and point to the options they'd pick, moving through drawn or printed sheets instead of finished, interactive digital presentations. While traditional paper prototyping uses physical materials, the same principles apply to low-fidelity digital wireframes that simulate interactions without full development.

What can it do?

Paper prototyping helps the design team work quickly and gather audience participation from real users. It can identify usability issues with navigation, architecture, or layout before costly investments in development. The low-fidelity nature encourages users to focus on functionality and flow rather than visual polish, leading to more substantive feedback.

How is it used?

Pages or screens are designed for every option (or button) represented in navigation. Users "press" interface elements, and are handed new pages for each option they select. Prototypes can be simple sketches or detailed design compositions. For the test to be valid, it is essential for each and every clickable option to have a subsequent page.

Testing typically involves a moderator who helps guide the user through the experience, handing them sheets related to the design elements they've selected and occasionally asking questions or

seeking clarification about specific choices. Other research team members may observe and take notes about the interaction between the user and page elements. Digital low-fidelity prototypes work similarly — users click through simple wireframes while researchers observe and ask questions.

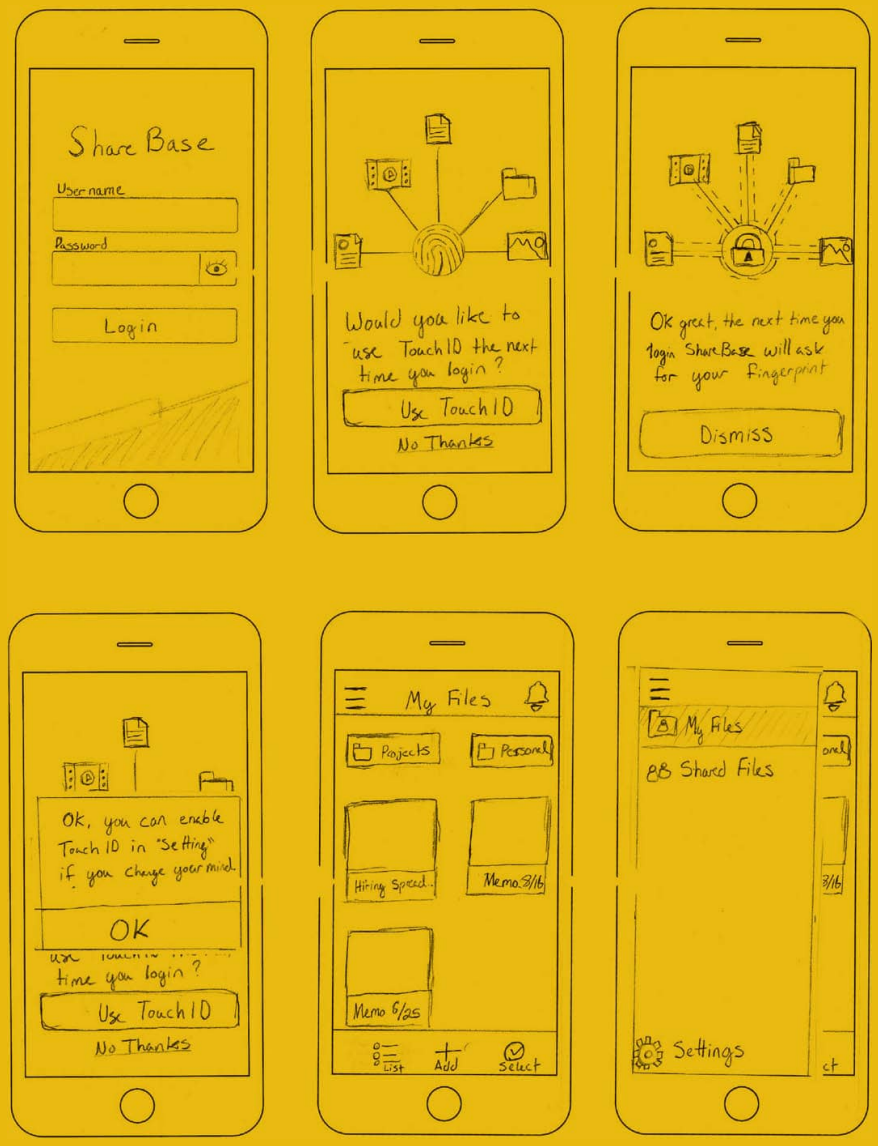
When is it used?

Paper prototyping can influence project development, testing initial assumptions on interface design and architecture. It can also be employed later in the design process, when high-fidelity layouts are complete, as a final assessment before development. Paper prototypes are particularly valuable in co-design sessions where participants can sketch directly on materials.

Level of difficulty/complexity?

Paper prototyping is a quick, approachable, and affordable way to validate design decisions while engaging actual users. Digital wireframing tools offer similar speed and low cost while enabling remote testing and easier iteration.

Because paper is a static medium, things such as sound, motion, and video cannot be easily expressed. As digital products become more rich, paper prototypes may be limited in their ability to accurately represent finished projects.



***This paper prototype was created by Hyland Software's UX team for their enterprise cloud-based file sharing application*, ShareBase.**

The interaction displayed is designed to persuade people to enable a fingerprint scanner on their device to protect their files.

Hyland's UX team tested this paper prototype during user interviews to gauge the features' appeal before investing in development.

▶ Description

TACTIC:
PERSONAS

What are they?

Personas are composite character models representing different user types. Based on real research data, personas identify user motivations, expectations, and goals. Think of a persona as a singular icon representative of an entire group. Conjecture regarding the persona's reaction in a variety of situations can help designers identify common needs.

In communication design, personas are most commonly associated with digital product design and user experience work. The American firm Cooper pioneered this technique in the 1990s, demonstrating that users experiencing a problem don't always know how to solve it — which is why designers must base personas on research, not assumptions.

Although personas are composite characters, they represent the needs of real users and are developed through traditional research processes. This formative research is critical to validating the characteristics of the persona and ensuring that they are not instead based on the designer's opinion.

What can they do?

Personas help guide the design process by shifting the focus directly to the user. Findings will help organize information, structure navigation, or even influence formal presentation and color choice.

Because design efforts are based on these carefully researched and developed personas, the users' goals and needs are more likely to be addressed. As agreed-upon identity benchmarks, personas can also help the creative team substantiate their decisions when presenting design rationale to clients.

How are they used?

Personas are created using several sources of information, including ethnographic research, focus groups, interviews, and demographic data. A brief description (maybe one to two pages long) is then created to flesh out individual attitudes, behaviors, environmental conditions, goals, personal details, and skill sets. It is important for the researcher to try to identify several different user types so that the goals of all users will be met. Keeping persona sets small ensures that the design process remains manageable, with one primary persona as a focal point.

In some cases, teams create "proto-personas" — quickly developed assumption-based characters meant to be validated through subsequent research. While less rigorous than research-based personas, proto-personas can help teams start user-centered conversations early in a project.

Personas should be used as a component to a larger research strategy, not as a singular research method. Combining personas with other tools, such as user testing and market analysis, can give the designer valuable insight into the user's needs.

Personas have limitations. They can oversimplify complex needs or reinforce biases if based on stereotypes rather than research. Treat personas as guides, not rigid rules — they represent patterns in data, not real individuals.

When are they used?

Personas can be used throughout the design process. In the planning or formative phases, they can be used to align project goals with audience needs. During the creative development phase, personas can be used as a standard to measure structural or aesthetic decisions.

Level of difficulty/complexity?

There is a lot of information available about the creation of personas, specifically regarding their use when designing digital products and experiences. However, creating well-researched composite characters takes time, so production schedules should be written accordingly. Quick proto-personas can be created in a few hours, while research-based personas may take weeks to develop properly.

PERSONA **RESEARCH**



PERSONA 1: KENNY

Would rather spend time riding his bike than shopping with his girlfriend.

Still buys new clothes during the "back to school" rush in the fall, even though he graduated from college 10 years ago.

Works as a graphic designer and aspiring art director.



PERSONA 2: DANA

Has a dedicated "clothing" category allocated in her monthly budget.

Shops both online and in retail stores, often on a biweekly basis.

Works as a research analyst for a venture capital firm that funds socially relevant entrepreneurial endeavors.



PERSONA 3: ABELINO

Frequently entertains clients in both casual and formal social settings.

Due to time constraints, does most of his shopping online, both personal items and gifts.

Works in biotech.

By creating detailed fictitious personas, designers can develop systems that meet the needs and goals of primary and secondary users. Personas help make research results more relatable because they use a singular icon to represent a group of individuals. Featured here are three proto-personas, created as user models for a theoretical online clothing retailer.

EXPERT **VOICE**



Winston Wang
VP of UX Design
Oracle

DESIGNING THE FUTURE OF WORK

The future is bright if you apply your curiosity and creativity, have the openness to learn, and have the willingness to grow beyond the traditional role of design.

Eight years ago, I took a job as a design leader at Oracle, one of the largest enterprise software companies in the world. My mission: to help create the user experiences of hyper-automated AI and now software-agent-powered enterprise software systems — the future of work in the agentic era.

What I would soon realize is that some lazy habits from my early career were not going to cut it for this depth and scope of innovation. Back then, I could just look at the current UX and UI design of a product, work with my product leadership to understand what needed to be improved, and get right to work making the UIs easier to use — incorporate some new features, improve productivity, or make the product generally more contemporary and attractive, a.k.a. "the usual."

But reimagining enterprise business functions and business processes to be hyper-automated is a totally different level of problem-solving. Why? Because it's not just making the experience of work for one or even a set of users a little better. It's about reimagining the end-to-end work of entire teams or departments, using AI and software agents to deliver leaps in business and operational performance with significant reduction in cost, all the while delivering the same, if not better, quality of results. This was going to be more complex and challenging than anything I had encountered from my past designing consumer UX or even professional tools UX.

So how do you approach something this daunting? You guessed it, with research!

A General Approach

How do you design the AI and agentic enterprise of the future? Here's how we approached redesigning work in three phases.

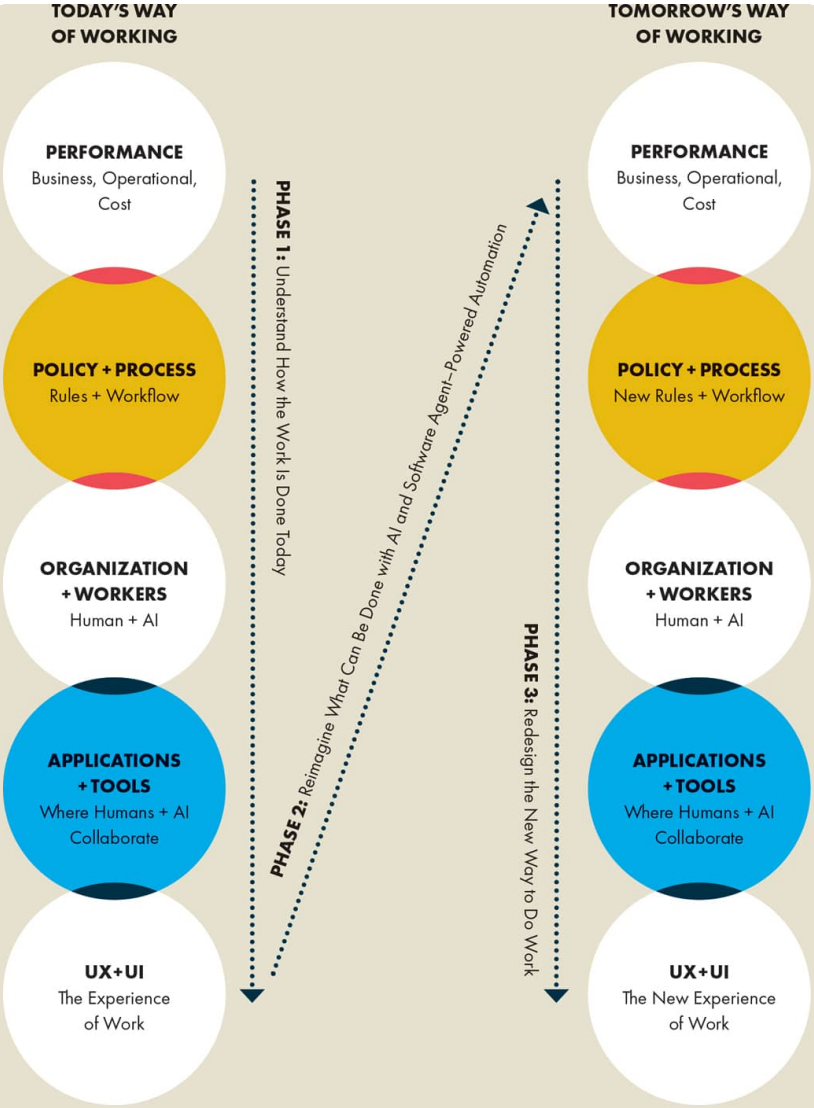
Phase 1 — Understand How the Work Is Done Today

Start by understanding it top-down. First, research and understand the business and operational performance that an enterprise function is currently achieving with the existing systems of work. For example, how much revenue is a company making in a quarter given the efficiency and cost of their sales team? That can be thought of as the outcome of how a company is currently organized, using their business processes and policies, undertaken by certain kinds of workers running their assigned workflow, using their existing applications and tools, with today's UX and UI. That's the research journey from the top down to the bottom or lower levels of how a company works. I cannot emphasize strongly enough that this Phase 1 research must happen. Because at enterprise levels, all these things are what work is actually made of. It's not just the user experience of humans doing work.

Along the way, you will create artifacts that capture what you have learned: organizational charts of teams and departments, user profiles and personas of different kinds of users or workers and their roles, policies that govern how work needs to get done, and more.

Some of the most important artifacts are the process and workflow diagrams that visually define the shape of work itself. This is one of the things I often skipped earlier in my career — designing flowcharts to define workflow. In enterprise work design, they are fundamental. With these diagrams, you can study how work is done now and by who or what, visually identify what can be improved, and redraw the new process of work. Doing so can bring your entire team together — executives, product managers, engineers, and UX professionals. Don't be lazy; draw the flow charts!

Tip: There are many kinds of flowcharts, but workflow diagrams with swim lanes show who or what is doing each step of the work. They are great to use. If you're lucky, a company's processes may already be captured and available for study as a Business Process Model (BPM) system that captures how a company runs at multiple levels of hierarchy, from whole departments down to task levels of detail of individual workers.



Follow this high-level three-phase approach to redesign work being transformed by AI software agents to deliver enterprise hyper-automation.

▶ Description

Phase 2 — Reimagine What Can Be Done With AI and Software Agent-Powered Automation

In this phase, work with your colleagues, especially the engineering and technically minded ones, to understand the capabilities of AI and software agents and how they could work with human users to do work in a new way. Expect massive and mind-numbing capabilities to come in this space. Exciting and interesting times ahead for sure.

Phase 3 — Redesign the New Way to Do Work

Start top-down once again. Define the new level of business and operational performance for the future system. Then define the new processes, policies, workflows, workers, tools, and finally, the new UX and UI for these applications and tools. Redesigning workflows, creating new human user profiles and now agent-user profiles and personas are key steps. Then define the applications and tools human-users will do that work with — potentially in new roles.

There Is No Short Cut

Designing the future UX and UI of a system you are transforming so fundamentally demands the full process. Making the old way of working a little easier, faster, and attractive will *not* deliver the leaps in business, operational performance, and cost reduction your customer is looking for.

One more thing: This process is not only the way to design the future of work. It may also be the future of a designer's work as well, especially for enterprise UX and UI designers. AI and agents are transforming our profession right now. But the future is bright if you apply your curiosity and creativity, have the openness to learn, and the willingness to grow beyond the traditional role of design. Remember, in all this, research will serve you well. Best of luck fellow "Work Designers!"

STRATEGY:
VISUAL EXPLORATION

Visual exploration is a method of primary research most commonly used by designers for solving problems of form and communication. Studies during this phase can include multiple variations of color, imagery, typography, and structure. Beginning with a series of thumbnail sketches and concluding with a realized prototype, this process is used to vet the most viable graphic solution.

TACTICS COVERED:

Color Psychology
Mood Boards
Sketching

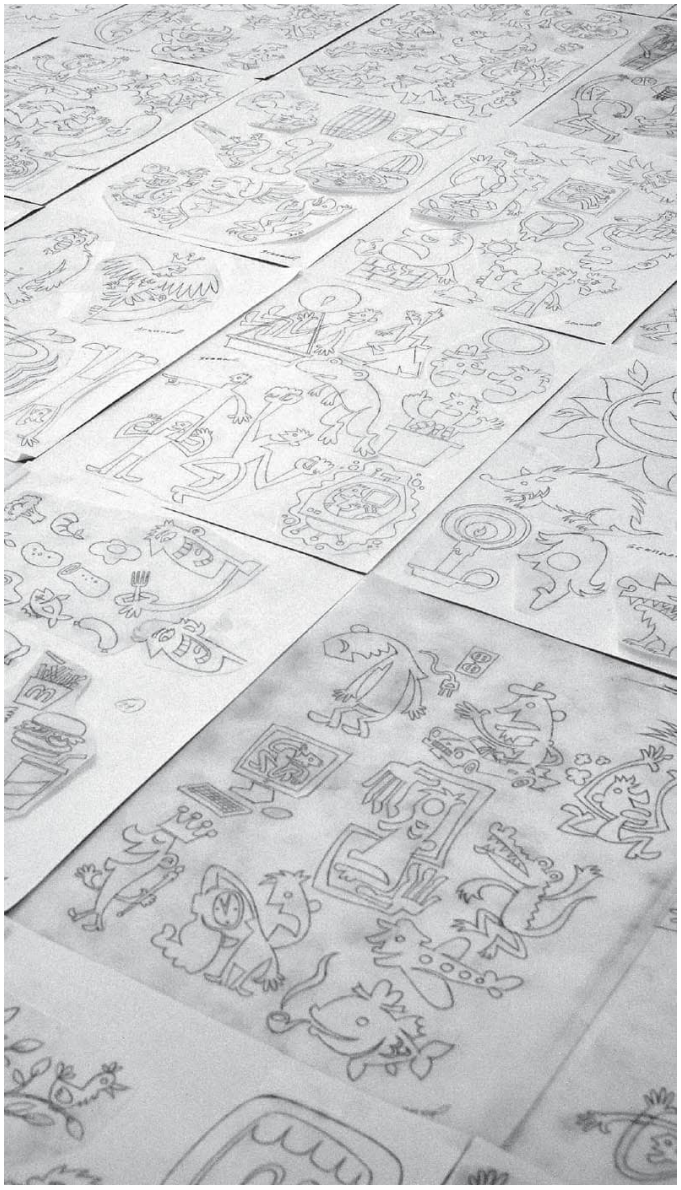
RELATED:

Contextual Inquiry
Observational Research
Unstructured Interviews
Focus Groups
Surveys + Questionnaires

The process of visual exploration forces creatives to move beyond initial concepts, often resulting in unique and innovative solutions.

Through the graphic testing of type and image in varying structural forms, the designer can prototype rapidly in either low- or high-tech fashion (traditional paper and pencil sketches or computer roughs). This rapid investigation allows the designer to develop grids and typographic systems that are appropriate for delivering concepts and content to the end user. This generation of multiple visual solutions allows for comparative analysis of a broad sample of possibilities, which enables the designer to see the most successful vehicle for communication. A spirit of experimentation, openness to new ideas, and rapid prototyping without fear of failure are key to this developmental process.

Visual exploration occurs after formative research has been completed. Using the information collected, the designer now focuses on creating visual prototypes engineered to meet the needs outlined during the research phase. Traditional sketching with pencil and paper remains the dominant form of rapid investigation, though designers develop their own methodology over time. Deadlines and budgets necessitate that these systematic visual development processes are executed fluidly.



***Designer and illustrator Von Glitschka prepared hundreds of sketches to refine content for his* Take and Make Art *vector illustration collection and book*.**

TACTIC:
COLOR PSYCHOLOGY

What is it?

Color psychology studies the effects that colors have on human behavior.

What can it do?

Color is a powerful nonverbal communication tool and can play an important role in the success of commercial projects. Color can evoke emotions, elicit feelings — even cause hunger (reds and oranges have been linked to inspiring hunger and even speeding up food consumption)! Color perceptions are frequently based on shared experience and cultural association. For example warm colors such as yellow and orange are colors linked with heat, fire, passion, love, and excitement. Cool colors such as blue, green, and violet are connected with the sea, sky, calmness, tranquility, and unity. Designers should be sensitive to the cultural perceptions of their target audience; for example, in many Western countries black is evocative of death, whereas in many non-Western countries death is represented by white. When branding a product for a global market, color selections require especially close consideration.

How is it used?

By studying cultural associations and trends designers can use color to help support their concepts. Pantone, Inc., provides free documentation on color forecasting every year and offers for-hire color specialization services for designers. Beyond supplying ink to printers, Pantone can help your team with color ideation and validation by doing research into target market, brand positioning, substrate suitability (web, paper, or textile), color meanings and association, trends, and psychology. Pantone can also provide guidance on achieving consistent reproduction across varying media.

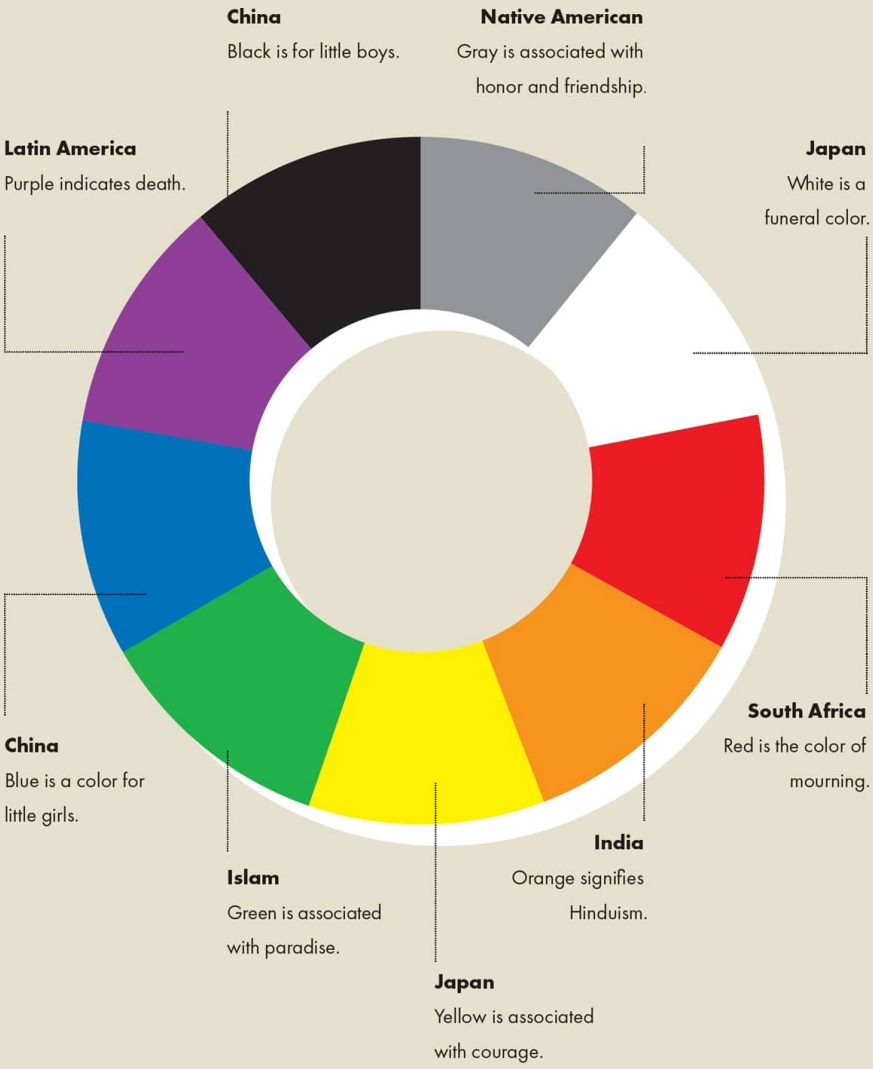
When is it used?

Decisions on the use of color are tested during visual explorations of form. Designers can choose the most appropriate color palette for a project based on preliminary research findings that illuminate the target market and color trends.

Level of difficulty/complexity?

Choosing the right color palette is essential to any design undertaking. In addition to Pantone, there are several organizations, including the Color Association of the United States and the Color Marketing Group, that can be helpful when forecasting and selecting appropriate color. In addition, there are numerous books available on color theory, psychology, and palettes.

CULTURAL INTERPRETATIONS
OF COLOR



Colors can have strong negative or positive emotional impact. This diagram outlines cultural color associations from cultures and countries around the world.

▶ Description

TACTIC:
MOOD BOARDS

What are they?

Mood boards are rapid visualization tools that aggregate imagery from numerous sources, helping the design team establish and convey an aesthetic tone.

What can they do?

Mood boards help communicate and clarify ideas, establishing a graphic approach. Assembling visual influences can combat the creative roadblock familiar at the start of new design endeavors. Mood boards can provide a tangible representation of design direction to non-designers, visually supporting concepts. They may also serve as a litmus test for a client's response to visualization, helping creative teams understand what's needed to achieve subsequent rounds of approval.

How are they used?

Mood boards get the ball rolling for the creative team. They assemble a tone that influences decisions about type, color, imagery, even editorial or narrative voice. They can provide historical reference for aesthetic choices and diagram current trends. Mood boards can be used to build consensus, internally or externally, around the visual direction of a project. They help overcome misunderstandings in the verbal descriptions of visual ideas.

When are they used?

Mood boards are formative. Like sketching or other forms of visualization, mood boards are most effective when crafted after initial audience/user research has been completed. Because mood boards convey concepts quickly, they can help the creative team bridge research and design, assembling imagery around ideas generated in the research phase.

Level of difficulty/complexity?

Assembling mood boards is fast, easy, inexpensive, and collaborative. Whether physically collaged or digitally collected, mood boards are an efficient and effective visual brainstorming method that can kick-start the creative process.



Agnes Studio's rebrand of the Cleveland Museum of Art's Education Art Collection began in the galleries themselves — mining the museum's collections for the visual language that would drive their mood boards and ultimately the new identity.









Agnes Studio's rebrand of the Cleveland Museum of Art's Education Art Collection began in the galleries themselves — mining the museum's collections for the visual language that would drive their mood boards and ultimately the new identity.

TACTIC:
SKETCHING

What is it?

Sketching, or visualization, is a rapid prototyping tool that designers use to make concepts easily understood. Visualization techniques help designers examine form, concepts, or even usability. Whether executed on paper or rendered in a three-dimensional modeling program, visualization helps turn abstract ideas into concrete tangible objects.

What can it do?

Sketching can help the designer/researcher avoid potential misconceptions with both clients and members of the design team. For example, presenting competing products, or storyboards, showing the client's product in context, provides others with a greater understanding of what a designer is trying to ultimately achieve. Using visualization as a part of an iterative design process allows for earlier testing and reduces the risk of going to market with a product that doesn't resonate with the public or meet the needs of the end user.

How is it used?

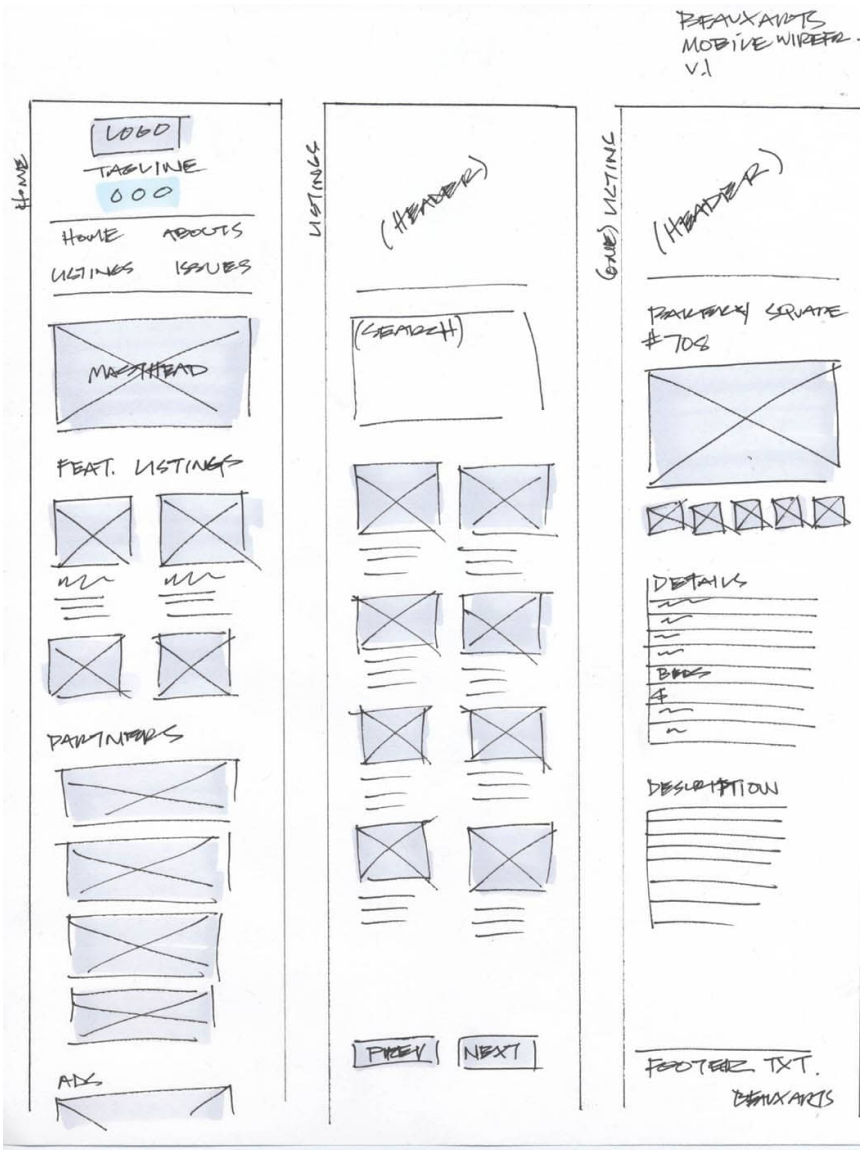
Designers can use a broad range of tools for sketching, including computer renderings, models, comps, wireframes, storyboards and mood boards to visually articulate their concepts. Computer renderings and prototypes help communicate three-dimensional objects and environments. Storyboards or visual narratives can show how the product can be used in context. Designers can also use visual thinking or graphic organizers such as mind maps, to communicate concepts.

When is it used?

Sketching is formative research. In the early phases of the design process, rough visualization techniques such as sketching wireframes or paper prototypes are quick, cheap, and easy to execute and update based on client feedback. During later stages of the design process, refining these prototypes ensures that research findings are reflected in the end product.

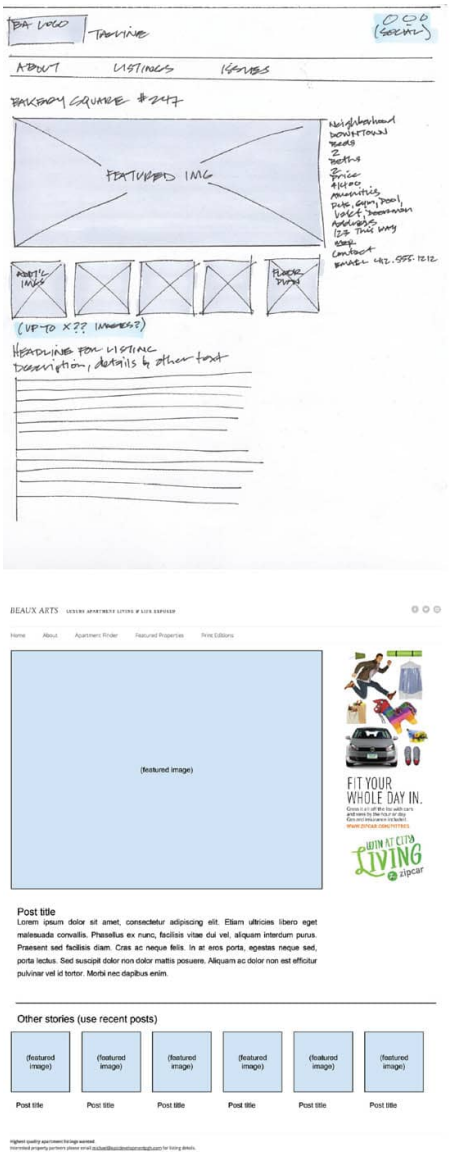
Level of difficulty/complexity?

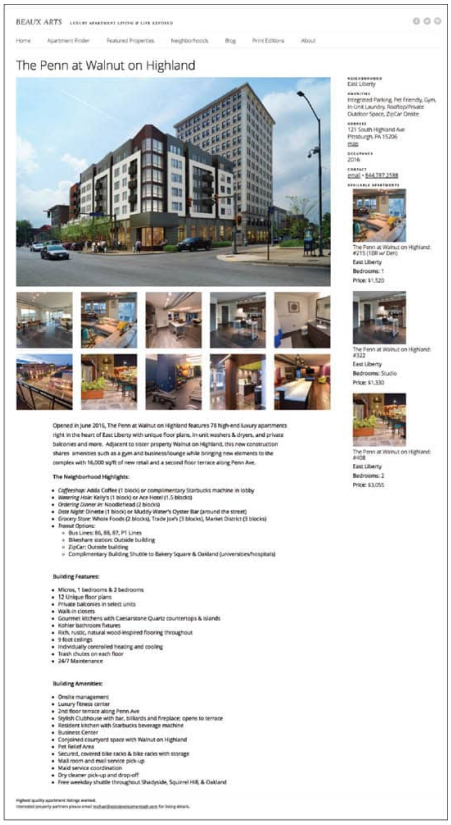
Designers are by nature visual learners, and this research tactic is a component of almost all design educations, making it the most commonly used form of design research.



Wire frames, like these by Andrew Twigg a UX Designer and Professor at the School of Design at Carnegie Mellon University, allow designers to quickly ideate and conduct comparative analysis between potential solutions. Wireframes can increase in fidelity from simple sketches to digital prototypes, accounting for complexity of features and interactions.

▶ Description





Wire framing helps designers explore and address usability issues before investing time in programming, or polishing aesthetic. Shown here is a progression from pencil sketched wire framing (top left), to a digital rough (bottom left), and finally the finished page (above).

▶ Description

QUICK **TIPS**

Get organized.

It may sound elementary, but in fact it's essential to clearly record, source, and organize your research. To get the most out of the investigative process take copious notes, organize the results into categories, and keep them in a job ticket of some kind (one that's shared if you're working as a team). Establish your filing system before you begin your investigations. Keep it simple to encourage consistent use. Proper documentation makes processing your findings more efficient and easier to share with your client or other members of the creative team.

There's always more than one side of the story.

Design research focuses on people, arguably making everything you do an ethnographic exercise with few absolutes. As such, never depend on a single data point. You won't have a clear picture. Triangulate your research, comparing commonalities, looking for outliers. Where you see convergence you're closest to the truth. Just as you shouldn't get all of your news from a single source, your research efforts are most legitimate when diversified.

Always use the buddy system.

Choose research methods that support each other. Pick a combination of exercises that serve different purposes, each designed to gather what another might miss. For example, surveys or demographic data rarely reveal user motivations; pair them with contextual inquiry or ethnographic investigations to build a deeper understanding of the subject.

Not sure where to begin?

Self ethnography is an approachable starting point for the researcher in-training. Want to know what it's like for your audience to navigate a museum, order a new product, or tour a college campus? Get out there, have the experience yourself, and begin documenting. The next chapter is filled with frameworks to help you become a good observer.

1. László Moholy-Nagy, *The New Vision: Fundamentals of Bauhaus Design, Painting, Sculpture, and Architecture* (New York: W.W. Norton & Company, 1938).
2. Henry Dreyfuss, *Designing for People* (NY: Allworth Press, 2003).
3. For more on the ACNielsen company, visit tinyurl.com/5695szw4
4. Read up on the amazing, historical happenings at Xerox PARC here: tinyurl.com/2js43rwk
5. Want a deeper discussion of value as it relates to design? Check out our other book, *Design Currency*: tinyurl.com/3nr8pctc
6. Read the whole report: "Design Index: The Impact of Design on Stock Market Performance Report to December 2004," London: UK Design Council, 2005, tinyurl.com/mvx53tsy
7. Read the whole report: "Good Design Drives Shareholder Value," Design Management Institute, May, 2015, tinyurl.com/3wbr6uw3
8. Read the whole report: "The Value of Design Factfinder," London: UK Design Council, 2007, tinyurl.com/vs4u5tn6
9. Read the whole report: "The Business Value of Design," McKinsey + Company, October 25, 2018, tinyurl.com/mr44cu43
10. Read the whole report: "The Economic Effects of Design," Denmark: National Agency for Enterprise, 2003, tinyurl.com/ysfbw4sz
11. Read the whole report: "Design-Driven Innovation: Why it Matters for SME Competitiveness," Dublin: Centre for Design Innovation, 2007, tinyurl.com/4vsva9be

CHAPTER 3

PRACTICING A RESEARCH-DRIVEN APPROACH

All designers are familiar with the creative process, but incorporating research methods into design practice, documenting findings, and articulating the value to both peers and clients can present new challenges.

MANAGING THE DESIGN PROCESS: **YOU NEED A PLAN**

All graphic designers and their respective studios move through an often complex process to create design collateral.

Whether the project is print, interactive, or three-dimensional in nature, designers use an established set of procedures to create innovative solutions to communication problems. Many studios offer their method as a proprietary service, noting the value that process adds in the otherwise intangible medium of creativity.

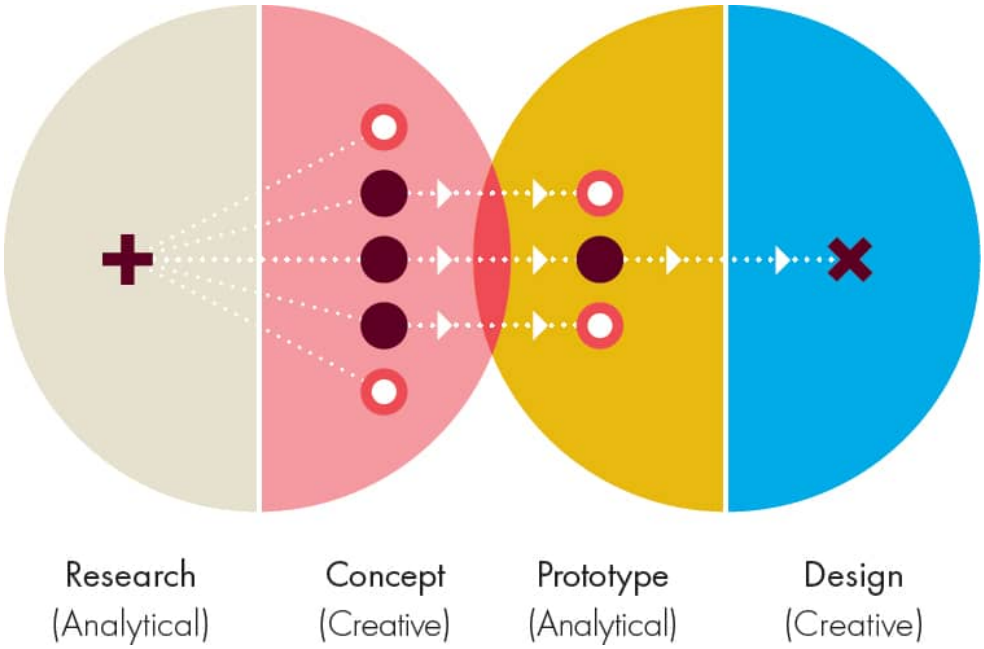
The graphic design process, as traditionally defined, is modeled around the physical creation of a single artifact: an annual report, a website, a poster, an app, and so on. As such, the process is inevitably project-oriented as well as linear — it starts with research and progresses through concept development, prototype, production, and delivery. Historically, the research phase begins with a review of a client's internal documents, interviews with key personnel or customers, and/or competitor analysis. These actions help a designer better understand an organization's goals and determine strategy and direction. While these forms of preliminary research are invaluable to a project's success, they are but an early step in its creation.

Research, as defined in this book, does not merely initiate the process, but rather augments it by integrating systematic investigation into each phase of a project's development. The research-driven design process also depends on assessment, or summative evaluation, which is undertaken throughout the course of (or even at the end of) a project. This allows the designer to reconsider assumptions gleaned from preliminary research. Using this data, the designer may opt to make adjustments to a design either before or, in certain situations, after production. This process

of reevaluation creates a culture of consultation. As a result, research-driven designers can engage in long-term relationships with their clients, acting as strategic business partners rather than service providers assigned to singular commissions.

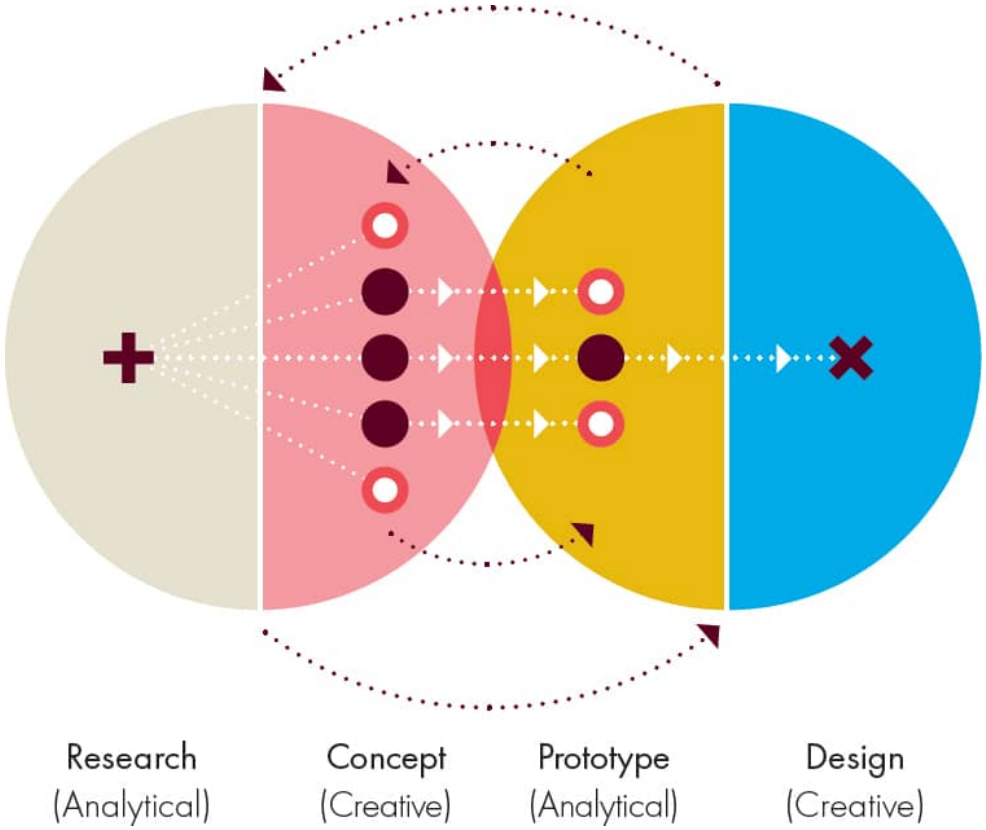
Graphic design researchers gather information, and use those findings to solve specific visual communication problems. Because each project or commission has a unique set of goals, requirements, and budget and time constraints, it is imperative to outline a plan before beginning the design process. Developing a plan creates a clear framework in which the designer can conduct and vet the investigation. Whether the tactics employed focus on market trends, consumer preferences, or brand perceptions, a comprehensive plan for gathering data will help clarify both the problem to be solved and the resources necessary to accomplish project goals.

LINEAR **PROCESS**



▶ Description

RESEARCH-DRIVEN **PROCESS**



Design is often viewed as a linear process. It begins with formative research — define the problem — then progresses through concept development, prototype, production, and delivery. Process, as depicted above, focuses on the creation of a singular artifact or campaign.

Applying research in multiple phases, an iterative process allows the designer to redefine early assumptions. While this model may involve more revision during development, better-informed design decisions often lead to more successful outcomes.

▶ Description

Many large design studios or advertising agencies are already billing their clients for research services, and have proprietary processes — the details of which they guard closely from the competition. Numerous small firms, sole proprietors, in-house teams, and freelancers have also outlined research patterns, customized to their resources. Creative processes, whether proprietary or public domain, allow the designer to pair the most appropriate research tools with project requirements — without reinventing the wheel for each assignment!

Furthermore, research indicates that studios that have an internally documented design process in place experience more successful project outcomes, with increased time-to-market and higher client and end-user satisfaction. Documenting and adhering to a standardized process — regardless of what that process may be — serves as a management tool, helping the creative team to work collaboratively, clearly delineate team roles, and manage client expectations.[1]

Individuals new to the concept of design research may find the established processes described on the following pages to be an invaluable foundation on which to base their own investigations. Adapt as needed.

ITERATIVE **DESIGN**

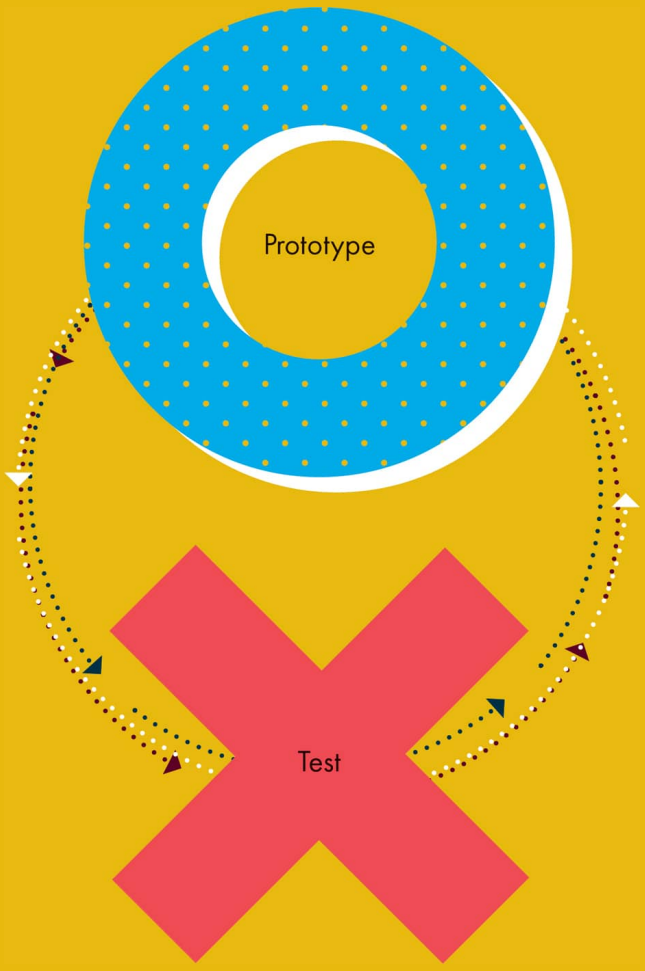
Iterative design is a cycle of prototyping, testing, analysis, and refinement. In this process the creative project is evaluated with user-based research methods, comparing successive versions, or iterations against project goals.

Interaction with the target audience can reveal complications, generate new questions, and sometimes uncover solutions. Any design commission can benefit from this process of collecting and integrating audience feedback. But, it is an especially beneficial practice for interactive and experience-based projects with multiple, interconnected components.

The complexity of an iterative process depends on which research tactics are chosen and how many iterations are intended. If working on the redesign of an existing system, or updating the functionality of existing tools, time should be allotted for benchmark testing of the original — before new iterative cycles begin. Understanding how well the original design functions in tests with audience members can provide the design team a baseline metric to work with when validating new designs.

Be aware that even when using accessible techniques, multiple iterations will increase production timelines and, consequently, budgets. Be certain to clearly define project testing goals, with client approval, at the start of a project. This helps avoid perpetual testing cycles which can result in ballooning project scope, delayed production, increased costs, and general frustration. Because most of design research is qualitative in nature, prototypes rarely make everyone happy. Stay focused on how test results relate to project goals. Testing is about informing, not paralyzing the process or predicting design outcomes.

ITERATIVE **PROCESS**



Using a sequence of prototyping and testing, an iterative process allows designers to collect audience feedback, informing their design direction.

DESIGN COUNCIL'S **DOUBLE DIAMOND PROCESS**

Seeking to better understand design's application in a corporate setting, Design Council, an industry advocate in the UK, studied the processes of eleven top design-led companies.[2] Those selected represented multiple business sectors, showing consistent and successful use of design related to business outcomes.

The research team wanted to find out how design was integrated organization-wide (beyond creative departments). They examined the development and execution of ideas, products, and services, distilling best practices in problem solving and design management that could be shared with the broader profession.

While each company varied in size, market, and product offering, Design Council was able to identify similarities in approach. They used this information to craft a model, The Double Diamond Design Process, outlining four stages that all designers must navigate when undertaking a commission: Discover, Define, Develop and Deliver. Research is integrated throughout, helping to define the problem and delineate the best possible design solutions, with iterative loops often occurring within or between each phase. The model is summarized here:

Discover: This initial step focuses on posing a question, analyzing a problem, or identifying a potential opportunity. In the Discover stage it's essential to remain open-minded to diverse concepts, ideas, and influences.

Define: This phase aligns ideas generated in the Discover stage with overall business objectives, potential return on investment, and feasibility. It concludes with a clearly articulated project brief, outlining goals, deliverables, scope, schedule, and budget. This

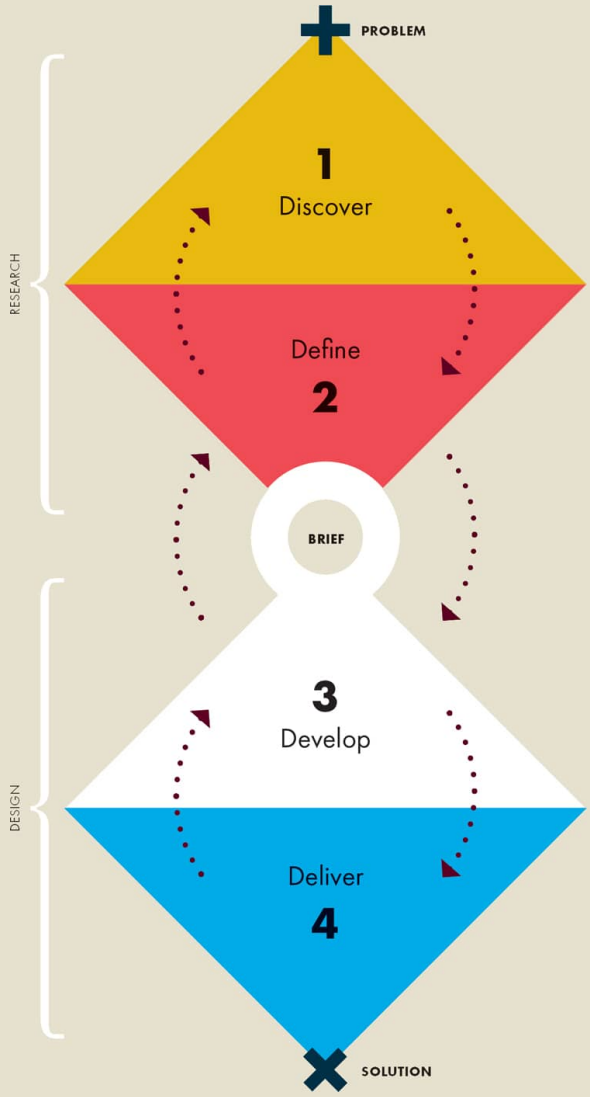
ensures that client and designer have a mutual understanding of project purpose, and that members of the creative team understand individual roles and responsibilities.

Develop: Design concepts transition into working prototypes, tested with users, ensuring they meet the objectives outlined in the previous Define stage.

Deliver: Final products, messaging, or designs are delivered to the audience. Summative evaluation may occur in this phase, confirming alignment with project goals or identifying areas for further development.

These project development steps can be applied by creative professionals working in any field. Use of the model doesn't guarantee project success, but it certainly helps manage the creative process. Amidst chaotic rounds of ideation and innovation, Double Diamond helps the designer stay on track. The model is most functional when there is active collaboration between creatives, clients and project partners, demystifying creative and showcasing the value it generates.

DESIGN COUNCIL'S **DOUBLE DIAMOND PROCESS**



Design Council's Double Diamond Process outlines four stages, each with opportunities for iteration, guiding the designer from problem assignment to finished solution.

INFORMATION LITERACY
THE BIG6 +
THE SUPER3

Information Literacy, a lifelong learning strategy, focuses on empowering individuals by instilling the ability to recognize when information is needed, and to have the skills to find, evaluate, analyze, and effectively use that information.

Designers will find that information literacy strategies coincide with their ability to find, harvest, and analyze complex content, creating a familiar environment for the practiced information architect. While there are numerous documented models for framing research problems, one that coalesces particularly well with the problem-solving skill sets of visual communication design is The Big6. The Big6 is an information literacy model, or information problem-solving strategy, developed by Dr. Mike Eisenberg and Bob Berkowitz (Dean of the University of Washington Information School, and School Library Media Specialist with the Wayne Central School District in Ontario Center, New York, respectively). This model, which provides the user with a formula for problem solving, has been widely used, from educational settings to corporate professional development programs to adult retraining. Because of its inherent flexibility, the Big6 can be used as a model for approaching any information-based problem, design projects included. Many designers will, in fact, find that they are already going through a number of the documented Big6 steps when working on creative communication projects. Eisenberg and Berkowitz say of the Big6: "It's not necessary to complete these stages in a linear order, and a given stage doesn't have to take a lot of time." This is especially welcome news to creatives with tight production schedules and modest budgets. The Big6 process uses these six steps to clarify an information-based problem. Try applying them to your next project.

1. **Task Definition**
    - 1.1 Define the information problem
    - 1.2 Identify information needed

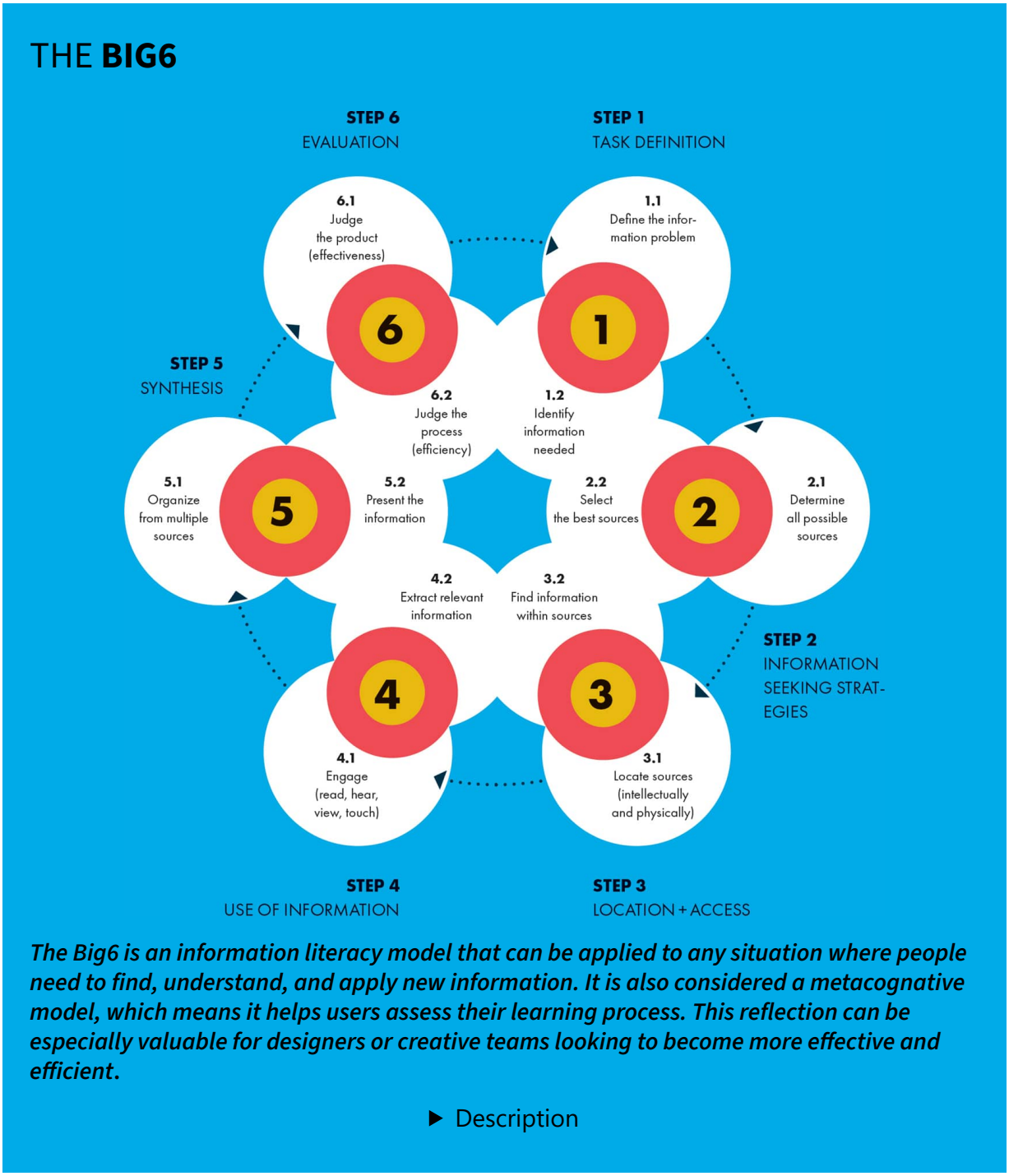
2. **Information Seeking Strategies**
    - 2.1 Determine all possible sources
    - 2.2 Select the best sources

3. **Location + Access**
    - 3.1 Locate sources
    - 3.2 Find information within sources

4. **Use of Information**
    - 4.1 Engage
    - 4.2 Extract relevant information

5. **Synthesis**
    - 5.1 Organize from multiple sources
    - 5.2 Present the information

6. **Evaluation**
    - 6.1 Judge the product (effectiveness)
    - 6.2 Judge the process (efficiency)



The Big6 is an information literacy model that can be applied to any situation where people need to find, understand, and apply new information. It is also considered a metacognative model, which means it helps users assess their learning process. This reflection can be especially valuable for designers or creative teams looking to become more effective and efficient.

▶ Description

The Super3 contains the same basic elements as the Big6, but was written for a younger audience, breaking up the steps into *Plan*, *Do*, *Review*. This simplified version provides an essential structure for developing and understanding your own creative process. You might think of the Super3 in a design context such as this:

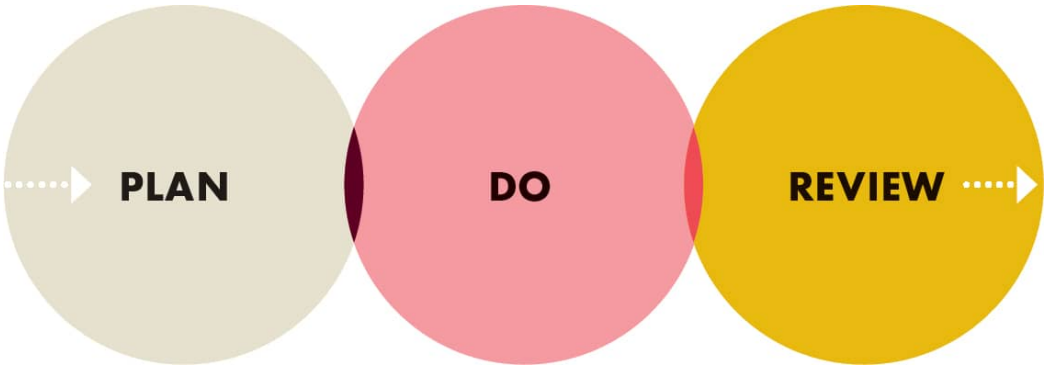
1. **Plan (Beginning):**
    1.1 What is the assignment?
    1.2 What does success look like?
    1.3 What information is needed to do the job?

2. **Do (Middle):**
    2.1 Conduct research
    2.2 Synthesize findings
    2.3 Design

3. **Review (End):**
    3.1 Were project goals accomplished?
    3.2 Are all stakeholders satisfied?
    3.3 Is there anything else left to do?

Note: Read more at big6.com

THE **SUPER3**



The Super3 breaks the Big6 down into smaller and easier to understand steps for younger users, or people who are new to the concept of information literacy.

RESEARCH **PLANNING**

With so many different research methods to choose from, integrating them into your practice can seem overwhelming. Which do you choose? How will they benefit the project? Where do they fit into your already established process? How can you communicate the value of research-driven design to your clients?

TOPICS COVERED:

KWHL Tables
Logic Models

RELATED:

Person-First Philosophies
Triangulation
Managing the Design Process
Research Summary Reports
Creative Briefs

Writing a research plan at the beginning of a project can help organize your thoughts, guide your team, and help you bring key stakeholders on board.

It outlines what you're going to do, and why you're doing it. It's an essential communication tool, describing each team member's roles

and assignments. This can provide transparency for the client, illustrating that creativity and innovation aren't magic — they're the results of hard work and informed decisions.

While every project is unique and requires customization around scope, timeline, and budget, there are some basics that can help you draft a research plan for any problem you're trying to solve. Consider the following sections of an adaptable general model:

Background: Outline project goals. Explain why the work was commissioned and what is to be achieved. Whenever possible, include information about audience. Background places the project in context. Putting it in writing also ensures that you and your client are on the same page. Perhaps some of this information has even been provided by them, when the project was initiated.

Assumptions: At the beginning of any new project, all members of the team have their own ideas regarding the assignment, the audience, possibly even the client. List those assumptions. They're essential for helping you ask the right questions later. Get them all out on the table early. It clears your head and simultaneously jump-starts your research. If appropriate, you may even involve stakeholders or constituents.

Research Questions: Draft questions relevant to project goals and what you've learned in the assumptions phase. Determine what you don't know, and what you'll need to have answered in order to move forward. Try to keep the list concise. Too many questions can mean that aspects of the project remain unclear, for you and the client. An unwieldy number of research questions is usually indicative of an unfocused project.

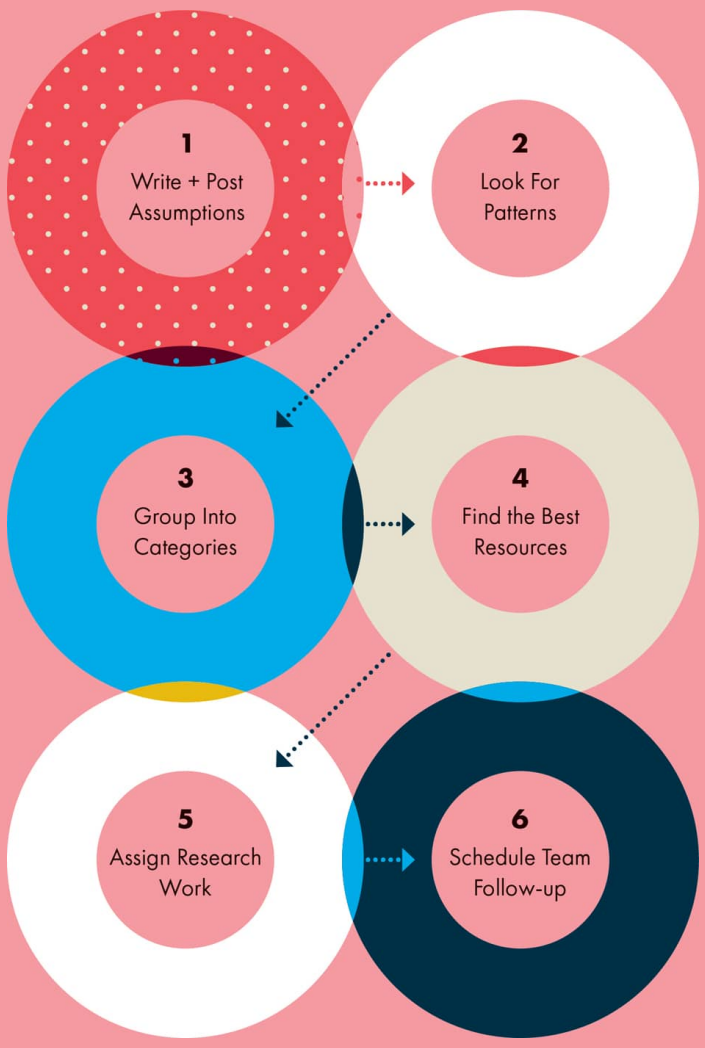
Methods: Once you have placed the project in context, and you know what questions need answered, select research methods appropriate to time frame and resources. Select tools that will give you the most valuable information as quickly and efficiently as possible.

Implications: Implications connect research methods back to project goals. This step outlines how the research contributes to a successful solution. Implications answer research questions and validate — or invalidate — assumptions. They also show your client the value of research, illustrating how doing the homework early can save money in the long run by avoiding costly missteps.

Resources: This part of the plan accounts for the impact of research on project time-line, budget, and staff. Integrating research exercises into project production schedules is helpful, providing a clear and shared understanding of who is responsible for what, and when. This also provides an estimate of time-on-task, accounting for research activities and their impact on project costs. It can reveal if the team will need outside assistance to help plan accordingly.

A research plan should be a living document. Treat it as a guide, not as dogma. Don't be afraid to adjust the plan as things evolve. Just make sure that your team and your client are in agreement when things start to shift. Regular updates on progress — both internal (to your team) and external (to your stakeholders) — keep the project on track, and that plan you've so carefully crafted from falling unused into an empty drawer.

ASSUMPTIONS **EXERCISE**



Outline project assumptions with this simple process: Ask participants to write each assumption on a single sticky note. Place them on a wall or community work space. Individuals can write as many assumptions as they'd like. When the writing or conversation starts to lag, it's time to start looking for patterns. Group like concepts into clusters, creating categories. Once you're satisfied with those categories, start thinking about the best resources to dig a little deeper into the related assumptions (books, articles, videos, people). As you come up with answers to, 'How can I find out more about . . . ?,' write them down and assign the work to team members. Give everyone time to investigate the assignments. Schedule a follow-up discussion to share what everyone has learned.

This exercise is intended to help the creative team focus, proving initial assumptions valid, or demonstrating that they are false. Either way, this step helps to clarify what to do next.

▶ Description

KWHL
TABLES

KWHL Tables are widely used graphic organizers that help you plan information seeking strategies and organize results. They are easy to use and broadly applicable, appropriate for both your professional queries and your kid's first big homework assignment.

Use KWHL tables to organize your assumptions and kick-start your research plan. The KWHL process forces participants to rapidly identify what they do — and do not — know. This structured approach to early ideation sessions can be done individually, with a creative team, or even collaboratively with clients and stakeholders. The basic steps are outlined here:

K: What do I know?

This step asks you to outline your understanding of facts and information related to the project/ audience/message. It also encourages you to list some of those assumptions you've just generated, what you think you know about those same subjects areas. It's a good idea to visually differentiate proven fact from assumption for clarity. If assessing multiple categories, such as project/audience/message, it may be helpful to build individual KWHL tables for each, or create a more complex master chart. (Hooray grids and color coding!)

W: What do I need to find out?

Groups of people working together are often more successful completing this step. Conversation around this question tends to generate more insights and queries than one person would working alone. Here it's your job to fill in the gaps between what you know for certain, and where you're less sure and have questions. What do you need to investigate and uncover in order to make the project a success?

H: How will I find the information I need?

Time to connect research methods to questions, and hand out assignments if you're working with a team. Be mindful of how much time you have to devote to this exercise and plan information seeking strategies that will deliver the most accurate, detailed information in the most efficient manner. For example, it's easy to turn to Internet searches, but equally easy to find false information or fall down digital rabbit holes of distraction. Perhaps interviewing people is a faster path to provide some perspective?

L: What have I learned?

After conducting preliminary research to investigate assumptions and questions, complete the chart, recording what you've learned. Add a meeting with the team, if you're working collectively, and discuss the group's discoveries. Don't forget to keep your sources well documented for future reference. Findings will either confirm assumptions and answer questions, or raise new areas of investigation.

Use this tool at the beginning of the research process. It's useful for taking inventory of a new commission and crafting a more precise research plan. While KWHL tables are intended as a formative tool, the content assembled could be used as part of later reporting. Work smarter, not harder. Look for overlaps!

KWHL **TABLE**

What do I **know**?
What do I need to find out?
How will I find the information I need?
What have I **learned**?

Creating KWHL tables can help you develop a research plan. The exercise will identify holes in your understanding of the subject being studied, forcing the research team to develop strategies to find the missing information. Use this technique to kick off your research and work through early project assumptions.

LOGIC
MODELS

Logic models can help visualize your research plan, connecting research methods to intended outcomes, time, and resources.

For individual designers practicing solo on large-scale projects, logic models help break overwhelming workloads into achievable goals, reinforcing purpose, allocating time on task, and integrating research activities into overall project timelines. For teams, a logic model can be expanded to assign research roles to each member, accounting for every individual's contribution, and illustrating how it relates to project goals. Logic models can also be shared with clients, making the case for design research by delineating why specific methods are used and how they will impact project development and success.

Logic models commonly organize a project's timeline into research and design activities, breaking each step down into Objectives, Inputs, Actions, Outputs, and Outcomes:

Objectives define why you're conducting a specific activity. What you are trying to learn? In some scenarios, the objective can be framed by a specific research question that you are trying to answer.

Inputs take stock of resources — time, facilities, staff, external experts, even research participants. List anyone or anything you need to execute the activity.

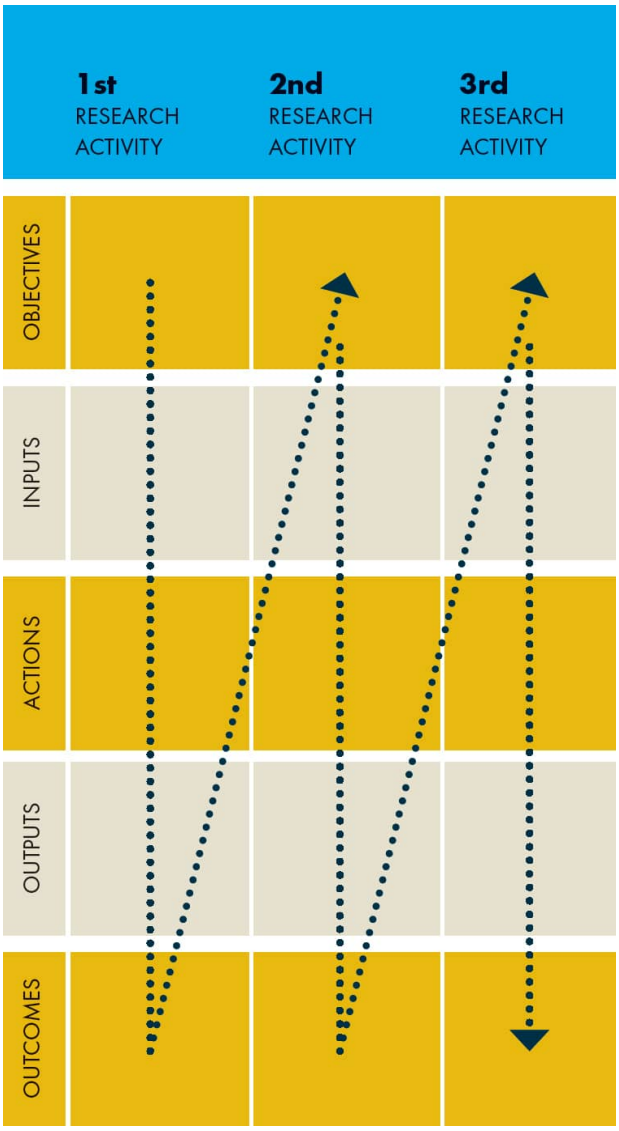
Actions outline what you are going to do. Be as specific as possible. Logic models are planning documents. Thinking through the actions helps you take stock of what really needs to be done, and what resources will be expended.

Outputs define take-aways or artifacts produced from the activity. What will be generated? How will that inform project development? Research outputs help you make the case for design decisions, reinforcing rationale.

Outcomes record the results of an activity. This category can be expanded to include projected outcomes (drafted when planning research activities) and actual outcomes (filled in after research activities are completed). Comparing these two columns either confirms or contradicts assumptions. There may be a story related to contradictions that warrants further investigation.

Let's apply a logic model to a common research action: For example, a literature review is often a first step on a new project. The "objective" of this activity is to become familiar with the problem, client, and audience. The "inputs" may include a collection of previously published marketing materials, competitor websites, and the individuals assigned to complete the review. The "action" for this activity would be to comprehensively review the material, extracting information relevant to the project. The "output" might take the form of a written report or presentation outlining key findings, or a mood board visualizing the client's current design strategy in contrast to those of their competitors. "Outcomes" could include generating an agreed-upon list of project goals with your client, identifying areas of potential differentiation and advantage, or outlining new questions to be explored with further primary research.

LOGIC **MODEL**



Logic models help structure research activities, focusing on Objectives, Inputs, Actions, Outputs, and Outcomes. As each research activity is performed, details are recorded in the framework. That information informs the next action.

▶ Description

When drafting the model, place activities and categories on opposing axes, creating a grid. So the example left would fill a single row. As project development progresses the information gathered should inform the next activity. While logic models organize activities in a linear way, be sure to indicate where there may be iterative

loops. For example, user testing may inform project development, but testing may need to occur more than once to ensure project success.

Adapt the category titles or structure to suit your needs. Experiment, and use what works best for you, your studio, or your market. Just be sure to clarify the need for the activity (Objective), what is to be done (Action + Output), and what you think will be accomplished (Outcome). Accounting for resources, time, and personnel (Input) takes the logic model from a research planning document and elevates it to a comprehensive production schedule and project management tool.

RESEARCH
ANALYSIS

You've invested significant time and resources in your research efforts, gathered pages of notes, observations, testing responses, visual references — what's next? How do you sort through all that information in an efficient manner? Distill the relevant findings? Make sense of disparate feedback?

TOPICS COVERED:

Sample Framework to Help Structure
Sample Framework to Help Empathize

RELATED:

Person-First Philosophies
Triangulation
Managing the Design Process
Research Summary Reports
Creative Briefs

Analysis frameworks provide structure for research findings (cataloging related people, places, things, and activities), or documentation of a user's experience (illustrating timeline and associated activity).

Frameworks allow team members to empathize with their audience. They provide a repository for information collected by multiple researchers, allowing the team to share and combine individual efforts.

The resulting visualizations provide prompts for group discussion. They can help designers connect concepts, find patterns, illustrate subject associations, demonstrate event sequences, compare and contrast, and more.

Using frameworks for analysis should feel familiar, because in many ways the process mirrors ideation exercises. Gather the standard ingredients: a pile of sticky notes, markers, an uncluttered work space, ample time for discussion, open-minded participants. Bring all the research findings you've collectively amassed.

Kick things off by writing the selected framework categories on whiteboard or wall. Start by placing your findings — or any new questions that may pop up — into the appropriate areas. One idea per sticky note — you know the drill. Look for patterns and clusters to emerge. Several observations in one column or too few in another may reveal an opportunity for design intervention, or identify an area that needs further investigation.

This is a qualitative process, so don't be afraid to try several different options for organization — some people combine multiple frameworks to distill their research. Different patterns (and opportunities) may emerge when you look at the data through an alternate lens. Apply what you have learned about convergence and triangulation to this process. If you keep coming back to similar conclusions, regardless of the framework you're using, those ideas are worth exploring through design.

SAMPLE FRAMEWORK TO **HELP STRUCTURE**

Some designers use proprietary systems to process their research findings, but numerous general purpose frameworks for conducting and analyzing ethnographic research exist.

Many of these are rooted in the work of Professor James P. Spradley, an anthropologist who taught at Macalester College in Saint Paul, Minnesota. Spradley developed a tool for structuring ethnographic observations that he called the *Descriptive Observation Matrix*.[3] Spradley's matrix structures observations into the following nine categories, summarized here with instructions on use:

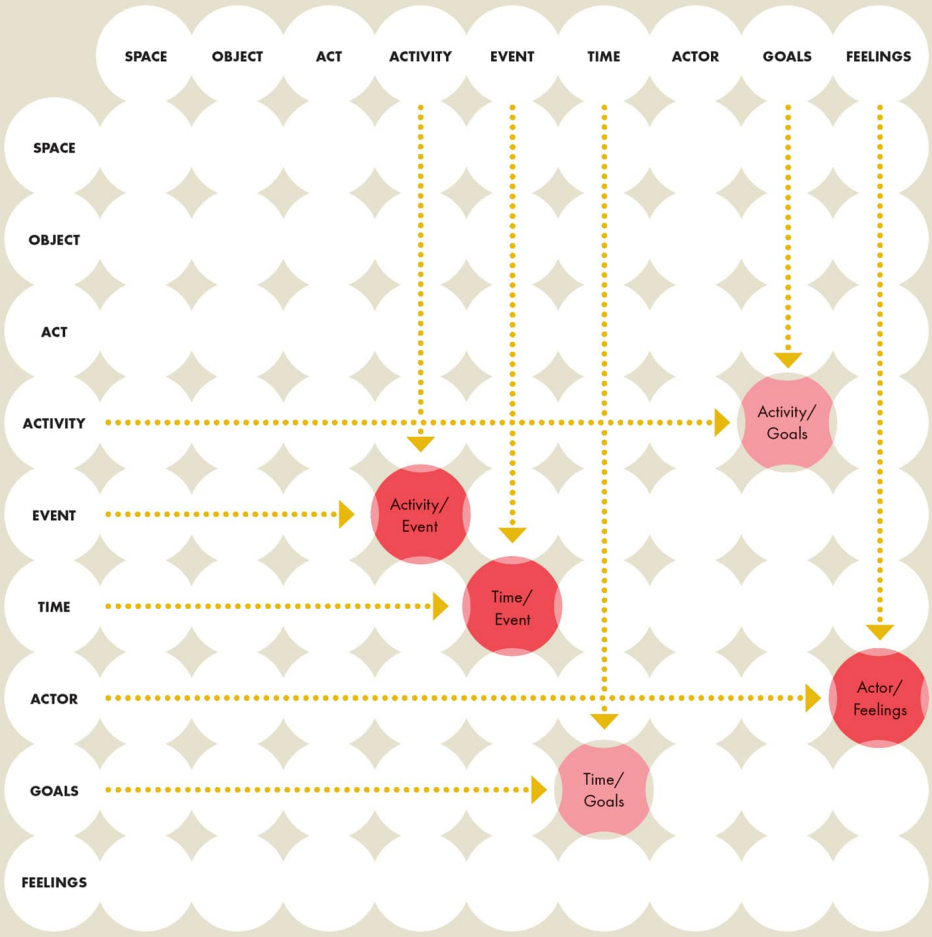
1. **Space:** Describe the physical environment in detail.
2. **Object:** Take stock of relevant objects in the environment.
3. **Act:** Catalog the behaviors of the individuals under observation.
4. **Activity:** Detail the actions performed by participants, including interactions with other individuals, objects, and the environment.
5. **Event:** Connect activities to happenings, or events.
6. **Time:** Chronicle the time and date of the observation, and the amount of time spent engaged in activities.
7. **Actor:** Describe the people under observation.
8. **Goals:** Note what the people under observation are trying to achieve in their activities.
9. **Feelings:** Recount any discernible emotions expressed by the individuals under observation.

Spradley suggested that placement of the categories be repeated on both the X and Y axes of the matrix, forcing the researcher(s) to explore how each classification influenced the other. For example, "What is the impact of physical space on participant goals?" or "How are activities related to feelings?"

Use Spradley's categories as a reference point for your own framework. Adjust category quantity and titles to align with the goals

of your investigation or project. The take-away is to be cognizant of people, the places they go, the things they use or encounter, and actions they undertake. Research activities and observations need to be summarized before they'll fit neatly into your system. Rarely does one framework perfectly serve every research query. Experiment until you find a structure that works best for you and your practice.

SPRADLEY'S **DESCRIPTIVE OBSERVATION MATRIX**



Spradley's Matrix forces the researcher to consider how categories that may seem disconnected influence each other. When compiling research (either from multiple activities or from several researchers), look for gaps in the matrix. They may indicate an area where more research is needed, or may reveal an opportunity for design to fulfill an unaddressed need.

▶ Description

SAMPLE
FRAMEWORK TO
HELP EMPATHIZE

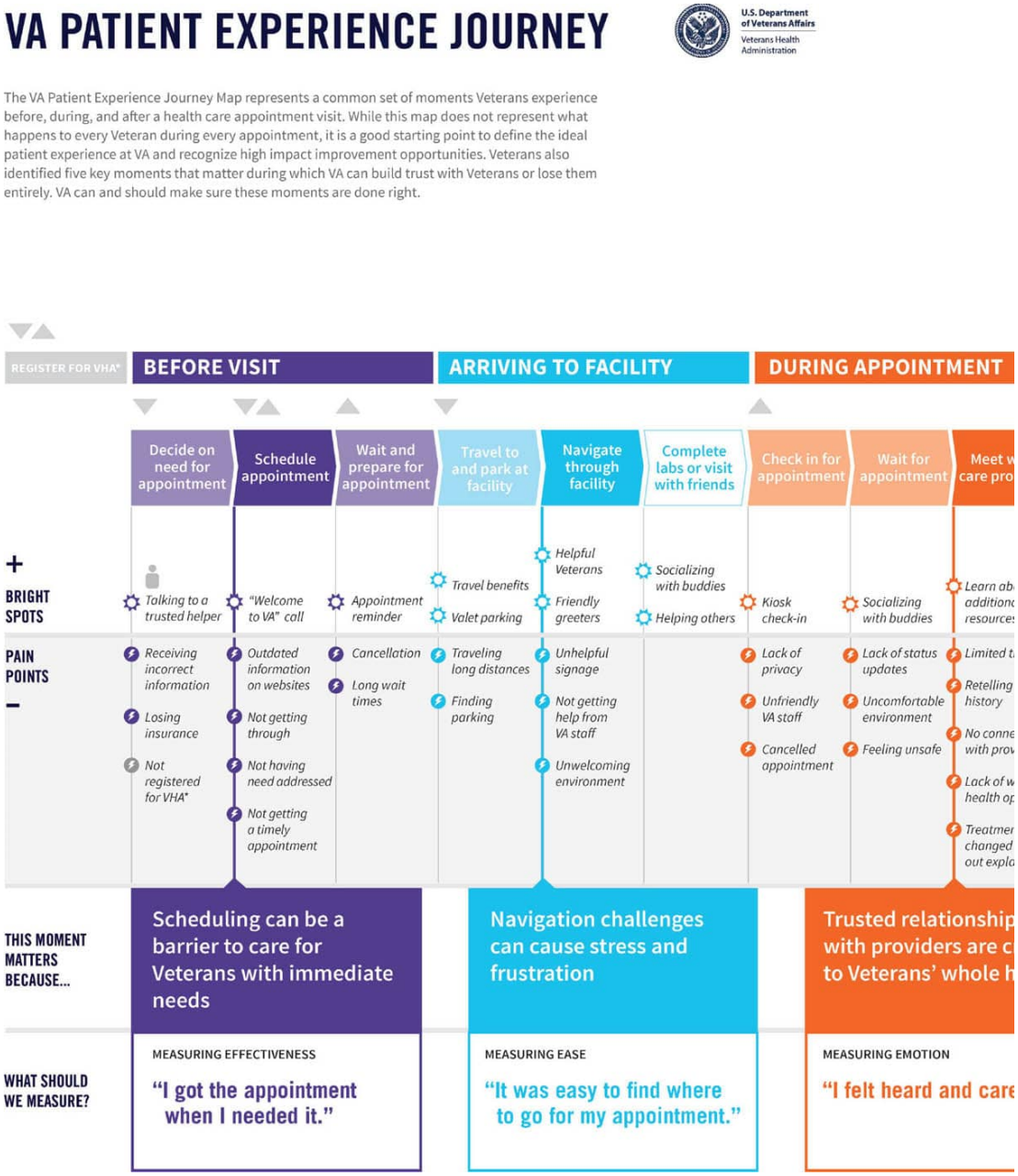
Experiences follow universal patterns, they have a beginning, a middle, and an end, like a narrative arc. They can be described in simple terms such as "before," "during," and "after." Using these temporal prompts, you can organize observations and research findings around a person's experience.

Recreating their path helps you understand their actions, avoidances, frustrations, and choices. The visualization of that path is commonly referred to as an experience model (also experience map, customer journey, user journey, patient journey, etc.).

Experience models can be used to document existing activities, or to prototype new ones. Using these models, you can map the impact of a change on an established system by projecting how shifts in one area affect subsequent actions down the timeline. Experience models can describe simple interactions (How does the shopping cart work on a particular mobile application?) or complex events (What exactly happens when a patient visits an emergency room?). At any scale, the key is to document all possible choices and outcomes as the experience progresses through completion.

To create a research analysis framework that will help you empathize with your user, start by outlining simple time-related categories such as "beginning," "middle," and "end" or "before," "during," and "after." More complex experiences may require further customization; however, the general tenets remain the same: You are trying to map the experience from the active person's perspective as they move through a sequence of events. If creative teams identify in advance that experience mapping will be a part of their research plan, they can use pre-established categories to organize field notes and

observations. This keeps the researchers organized, thinking of the participant at each interaction, and streamlines future analysis.



Event maps can be used by designers to determine the sequence of user behavior in an interactive environment, or even predict navigation of a three-dimensional space.

This detail from a patient journey map by The U.S. Department of Veterans Affairs outlines the experience of a VA site visit.

▶ Description

RESEARCH SUMMARY REPORTS AND **CREATIVE BRIEFS**

Research summary reports and creative briefs bridge the gap between research and design. These documents are essential to helping an internal team process. They can be shared to help stakeholders understand research findings and creative direction. The research summary report comes first, communicating what you've discovered during the formative research phase, essentially reporting the results of your research plan. The creative brief follows, outlining what you're going to do about it. Creative briefs guide the actual designing.

TOPICS COVERED:

Research Summary Reports

Creative Briefs

Cumulative Documentation

RELATED:

Person-First Philosophies

Triangulation
Managing the Design Process
Logic Models
Research Analysis

RESEARCH **SUMMARY REPORTS**

The research summary report presents investigative findings and analysis before making the pitch on how to solve the problem (that's the creative brief). The arguments crafted here, steeped in data and observations, are valuable resources should any of your future creative concepts come under scrutiny.

Research summary reports (or presentations!) should be crafted as a narrative, making the information easy to digest for the layperson. Tell stories from your fieldwork. Integrate experiences and dialog from participants whenever possible. Connect the formative research back to project goals and the experiences of real users. This places your findings in context, and can help you achieve buy-in from project stakeholders.

When drafting your research summary report use your original research plan as an outline. The report or presentation you're now crafting will walk project partners through your research process, so they can understand how you arrived at conclusions. Start with project objectives, progress through assumptions, research questions, and methods. Discuss the process of analyzing raw research: How did you arrive at the findings you're presenting? This is your chance to tell a story about what you've learned (and how you learned it).

RESEARCH SUMMARY **REPORT**



Research summary reports or presentations help connect research to project goals, making the case for creative direction. Distribute the report as a document, presention, or briefing — whatever will resonate with your team.

CREATIVE **BRIEFS**

The creative brief takes the research summary report — everything learned about audience and context during the research phase — and makes it actionable for the design team by connecting it to design deliverables.

It can be used to get a client's sign-off on strategy and conceptual direction before design begins. There are numerous takes on creative brief structure and content. The following will get you started:

Delineate Succinct Project Goals

What do we need to accomplish? These goals may mirror those established at project initiation/research planning, or they may have evolved or been winnowed during research. Project goals must be readily understood by all involved. Use clear and concise language to explain what the subsequent design pieces, activities, or creative campaigns must accomplish. Use the old "elevator pitch" as a standard: State your goal in as few sentences as possible, about 30 seconds spoken out loud. If you need more time than that, it's an indicator that your project remains unclear or unwieldy in scope.

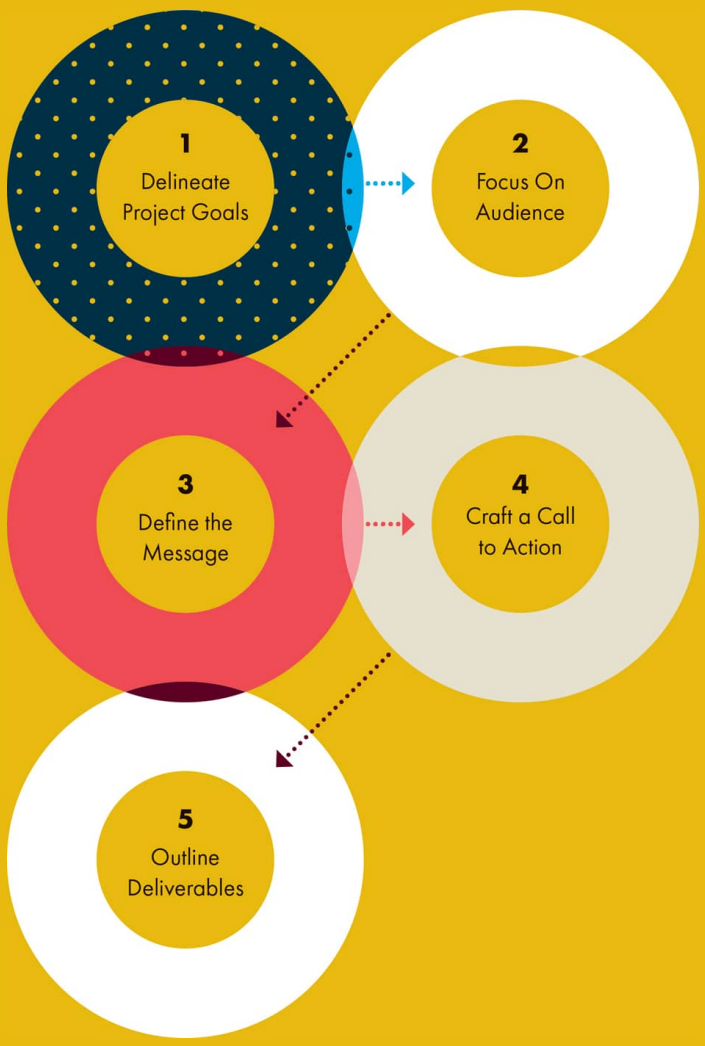
Focus on Audience

Who are you talking to, or interacting with, when the project is complete? Who will use your design deliverables? Now that you've invested research time understanding your audience, draft a clear description to share with the rest of the creative team and project stakeholders. Too often audiences are framed by demographics (ex: males, age 18–24). You've done your homework and know it's way more than age and gender, it's about culture, attitudes, behaviors, and beliefs. Present the audience as real people and you will know how to design for them.

Define the Message

What do you need to say? What tone, language, aesthetic, medium will resonate with the audience? Sometimes, in complex communication programs, there may be more than one message. If necessary, create clearly delineated hierarchies of communication for primary, secondary, and tertiary audiences and/or phases.

CREATIVE BRIEF **OUTLINE**



A good creative brief makes research actionable. Use this outline to get started.

▶ Description

Establish a Call to Action

What do you want the audience to do? What's the ideal reaction to the product you place in their hands, the message you send across their screen? Define what you want from the audience, then measure new concepts and ideas against that goal. Consider who benefits from the action you're suggesting. What's in it for the audience? Make that answer abundantly clear to encourage participation or purchase.

Outline Project Deliverables

Literally, what are you going to make? What channels of communication are appropriate (social media, online video, interactive, print, advertising, etc.)? What are the campaign's overall timeline and associated time-on-task, budget, and creative team responsibilities for each component?

If your inner artist is raging at the thought of all this reporting, embrace the frustration you feel when asked to read a long-winded paper or watch someone read slides during a presentation. Now don't do that to yourself, your colleagues, or your clients. From research planning through creative briefs and even external case studies, know your audience! You aren't being paid by the word, you're being paid to communicate. Multistage reporting keeps lines of communication open between stakeholders and ensures that research and creative activities remain connected. Deliver the information that's required in a way that engages the people you're sharing it with — if you're used to doing that for a target audience, you can surely apply those principles to documentation and summarization. Budget your time. Each subsequent report should build on the previous, diverging where necessary, according to new findings or strategy shifts, but not reinventing the wheel. These processes are intended to elevate your practice. They should be illuminating and adaptive. If it turns into bureaucratic reporting, you're missing the point — and the advantage these exercises provide when done right.

EXPERT **VOICE**



Aradhana Goel
Founder + Strategy Lead



Sara Frisk
Founder + Design Lead
Rouse Design Studio

JOURNEY MAPS: FROM SURFACE INSIGHTS TO SYSTEMIC CHANGE

When the map remains surface level, the solutions follow suit — copy changes, interface tweaks, incremental improvements. When it goes deeper, it exposes systemic friction and opens the door to far more meaningful intervention.

Journey maps are one of our all-time favorite tools. They can be used to empathize, choreograph, unify, and create a masterfully complex yet clear vision of the future. In our opinion, they're one of the most versatile tools in human centered design.

The only constant is time on the x-axis. Everything else is negotiable. When wielded with expertise, a journey map can adapt to nearly any problem you're trying to solve.

Beyond the Highs and Lows

In its most common one-dimensional use, a journey map conveys a linear set of steps with an emotional curve mapping high and low points. Low points illustrate areas ripe with opportunity while creating empathy with the user.

But emotional dips are rarely the true leverage points. They're clues, hinting at the real gold underneath:

- What structural forces create those dips?
- What policies or incentives reinforce them?
- Where are ownership gaps inside the organization?
- What data is missing at critical moments?

When the map remains surface level, the solutions follow suit. When it goes deeper, it exposes systemic friction and opens the door to far more meaningful intervention.

Leveling Up

We've found value using journey maps in four distinct ways. Each serves a different purpose in the design process.

1. Descriptive: Understanding the Current State

Early in a project, a journey map helps synthesize research. It aligns stakeholders around how things actually work, not how we assume they work.

This version focuses on user behaviors, context, and constraints. The goal is shared understanding. This is especially important in complex systems where siloed teams see only fragments of the experience.

2. Diagnostic: Defining the Problem Space

As research deepens, the map becomes analytical and enables additional dimensions like relationships between multiple actors, their roles and mindsets, data and operational flows, and business or organizational anchors and constraints.

This version reveals patterns and root causes. Instead of isolated pain points, we see systemic issues. Opportunity areas become defensible because they're tied to evidence and structure.

3. Service Blueprint: Exposing the Choreography

When looking at the journey from multiple perspectives (front of house and back of house, so to speak), it evolves into a service blueprint. The user-facing experience is mapped alongside backstage systems — technology, operations, staffing, compliance.

This shift reframes the conversation, mapping dependencies across actors and zooming out to see the impact of one path to another. Often, what appears to be a UX issue is revealed as an operational or policy constraint. Design decisions improve when teams can see interdependencies.

4. Strategic: Designing the Future State

Finally, the journey map can define an aspirational experience. It serves as a future-state vision, grounded in research and tied to measurable objectives.

In this version, the map articulates desired behaviors, target mindsets, experience principles, and the operational shifts required to support them. It becomes a strategic alignment tool, clarifying not only what the organization is moving toward but also what it will take to get there.

Example: Service Experience Blueprint

The journey example here comes from Help Stop Hate, a collaboration with the Illinois Department of Human Rights. As hate incidents rose across Illinois, the state's existing helpline lacked visibility, trust, and a clear path to support for those most impacted.

Working with UIC's Institute for Healthcare Delivery Design, we led a multidisciplinary team to conduct statewide research and develop a service strategy. The ecosystem was wildly complex, and the helpline represented only one small part of a survivor's broader journey — often involving family, community organizations, and law enforcement.

We launched Help Stop Hate with a robust Service Experience Blueprint to showcase the choreography of a new trauma-informed service model, redesigned intake flow, improved data strategy, and outreach connecting residents, providers, and partners across multiple channels.

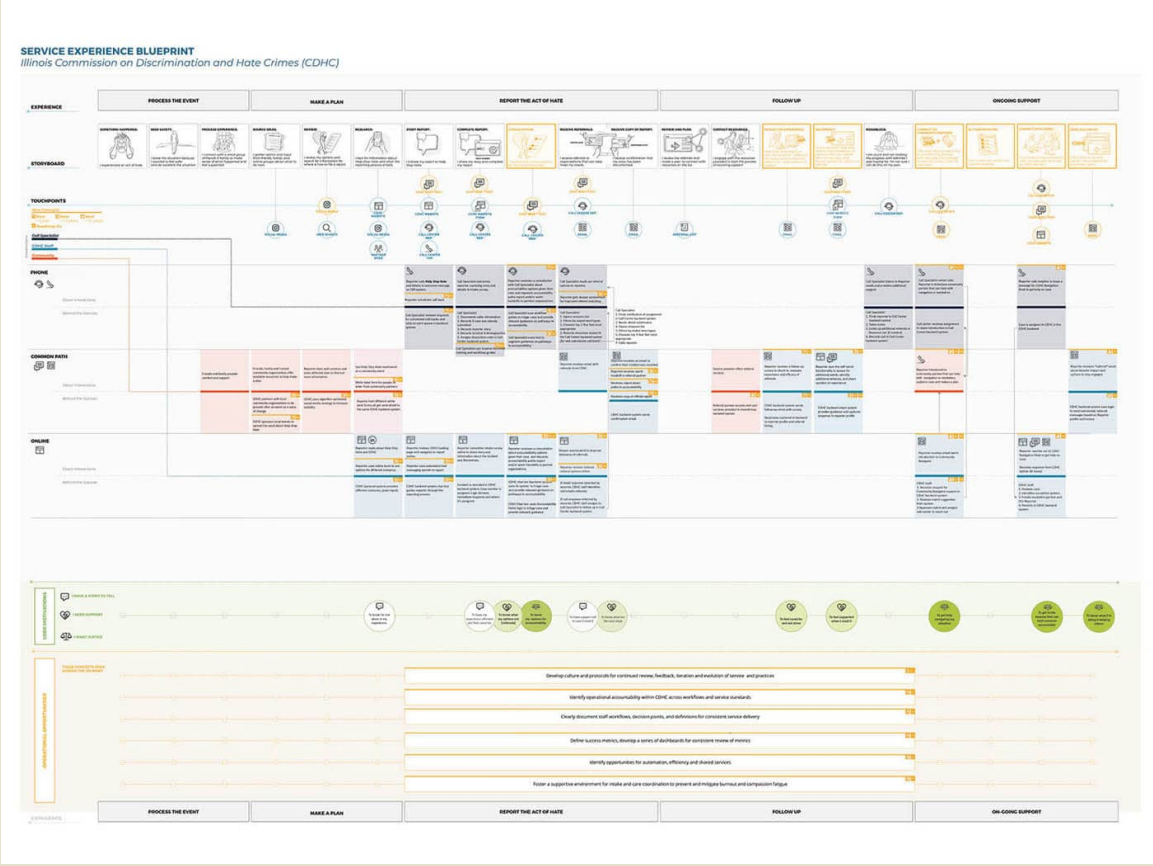
The Power of Intent

In short, a journey map is only as powerful as the intent behind it.

Before embarking on one, we ask

- What decision needs to be made?
- What business metric are we trying to influence?
- At what level does intervention need to occur — interface, service, or system?

The strength of journey maps lies in their flexibility. Used superficially, they create empathy. Used rigorously, they align teams, reveal systemic failure, and shape future vision.



Help Stop Hate's Service Experience Blueprint maps a trauma-informed service model across multiple touchpoints, showing how redesigned intake, data strategy, and outreach connect residents, providers, and partners.

▶ Description

CUMULATIVE **DOCUMENTATION**

Once a project has been completed and delivered to the client, research is *almost* over. Documenting the functionality and success of a finished project is an important phase in the research cycle and should not be overlooked.

When making a case for the value of design, the information gathered toward the end of completion is often the most compelling. Additionally, designers and their respective studios can learn important lessons by reflecting on the achievements and failures encountered during a project's development. Clients may be asked to contribute a letter or fill out a questionnaire describing their experience and level of satisfaction with the finished project. This appraisal should be documented in an internal case study and used to streamline future assignments.

Build a Personal Research Morgue

Don't pack those internal case studies away in moth balls. Build your own library. By documenting and archiving research and processes, and creating case studies of past projects, designers can start to build their own research library. Secondary research done for new projects does not always have to come exclusively from outside sources. Research undertaken for one project may also be valuable for later commissions. By archiving research and creative processes, documenting learning outcomes, showcasing end products, and understanding how they work, the designer can build a proprietary body of knowledge that will be invaluable for soliciting and retaining future work.

Contribute to a Body of Knowledge

Build your profession. Publishing successful research-driven projects — either individually or through organizations such as AIGA, Design Management Institute, the Design Council, or the International Council of Design — contributes to the collective body of knowledge in the field and promotes the undeniable value of design.

QUICK **TIPS**

Process vanquishes creative block.

Invest time outlining research plans and creative processes at the start of a project, and efficiency will be amplified during development. When you hit a creative road block (and everyone does occasionally), a dedicated process model provides a task list that will keep you and the project moving forward.

Logic models facilitate team building.

Remember hating group projects in school, when inevitably only a few people carried the load? Logic models force accountability by outlining each task and the party responsible for completing it. This system clearly delineates who's doing what, and how that connects to other people's assignments. It's harder to drop the baton when you know you have to hand it off to a team mate.

Work smarter, not harder.

As you're developing a research plan consider what you'll use to analyze results, it may frame how you record or document primary activities. Research reporting can take the form of presentations or papers; choose a manner of delivery that will resonate with your team. Keep in mind that during research planning, collection, and reporting, each step builds on the next and all share a common goal: You're building a comprehensive argument for what you'll produce in creative. This chapter is filled with a variety of methods, frameworks, and processes that can be used to your advantage — but you don't need all of them on every project! Use a combination scaled to time, resources, and project goals.

Borrow, build, share.

Professional organizations and universities have the time and resources to investigate things that small businesses don't (we've shared more than a few of them in this book). Borrow their models, and adapt them for your own use. Return the professional favor by spreading the word about these studies, and by making the time to document and share your own results. The field is richer when we build on example.

1. Read the whole report: Design Council, "A Study of the Design Process. Eleven Lessons: Managing Design in Eleven Global Brands," (Nov. 5, 2007), tinyurl.com/bdhbtks9

2. Read the whole report: Design Council, "A Study of the Design Process. Eleven Lessons: Managing Design in Eleven Global Brands," (Nov. 5, 2007), tinyurl.com/bdhbtks9

3. Read Spradley's influential book: Spradley, J. (1980). *Participant Observation*. New York: Holt, Rinehart & Winston.

CHAPTER 4

PROJECT SPOTLIGHTS

It's one thing to read about a concept, another to see it in use. The following pages feature research-driven design projects of all sizes, from experimental social concepts through massive shifts in corporate culture.

WONDERWHAT

AUDIENCE:

Secondary school students, teachers, careers advisers, university and college outreach teams

CREDITS:

Bond & Coyne

CLIENT:

Internal project

RESEARCH TACTICS INCLUDE:

Competitor Profiling

Contextual Inquiry

Observational Research

Unstructured Interviews

Demographics

Focus Groups

Surveys + Questionnaires

Analytics

Card Sorting

Personas

Mood Boards

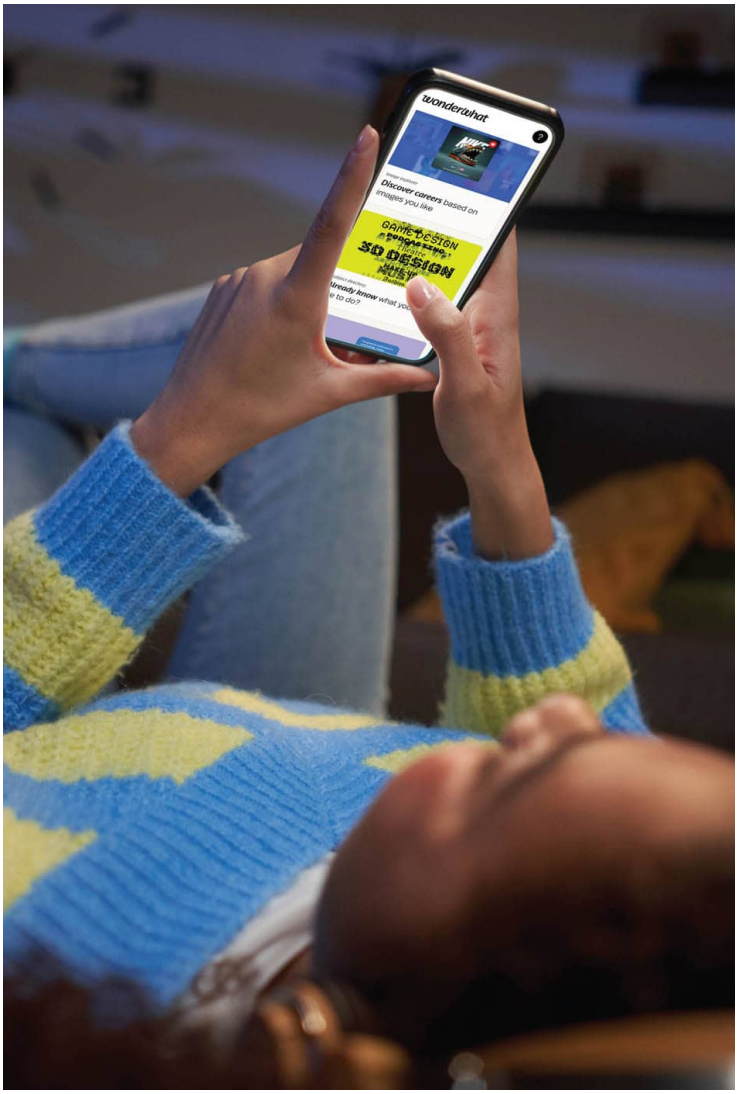
How do you help young people find their future when they don't yet know what's possible? You start with curiosity instead of direction.

Goals

The creative industries in the UK faced a genuine talent crisis. The number of young people choosing to study creative subjects had been declining for years, driven by low awareness of career opportunities, misconceptions about salaries and advancement, and an educational culture that quietly funneled high-achieving students away from creative disciplines. For many teenagers, the first question in a careers conversation was still "What do you want to do?" — nearly impossible to answer when you didn't know what you didn't know.

Bond & Coyne, a London-based branding and design agency, had spent more than two decades working in and around this problem — as lecturers, design consultants supporting universities and colleges, and eyewitnesses to the shrinking talent pipeline. They decided to stop observing and start building. WonderWhat, a self-initiated digital platform, was their response. The goal was direct: get WonderWhat into the hands of every secondary school student in the UK and increase the number of young people pursuing creative study.

They also envisioned creating better tools for teachers and career advisers, and building a community of higher education and industry partners who shared the mission.



WonderWhat's digital platform centers the student as an active discoverer rather than a passive recipient of career information — a deliberate departure from how most career education tools are designed.

Research + Deliverables

Research Phase: Because WonderWhat was self-funded, every decision carried weight. Bond & Coyne committed early to a research process that would test assumptions rather than confirm them — reaching into schools, universities, industry events, and career education contexts to understand their audience from the inside out.

The team conducted focus groups with students of varying ages, in both formal and informal academic settings. They gathered

responses through surveys and questionnaires. Contextual inquiry at education conferences placed researchers directly in the environments where career-readiness conversations occurred. Unstructured interviews surfaced unexpected perspectives from students and educators alike. Observational research and card sorting helped the team understand how teenagers navigated information and made choices. Competitor profiling mapped the existing landscape of career exploration platforms. Demographics, personas, and scenario planning tested ideas like a teacher dashboard and classroom learning materials. Analytics from early beta releases informed subsequent development.

Analysis + Insights: Three insights proved foundational:

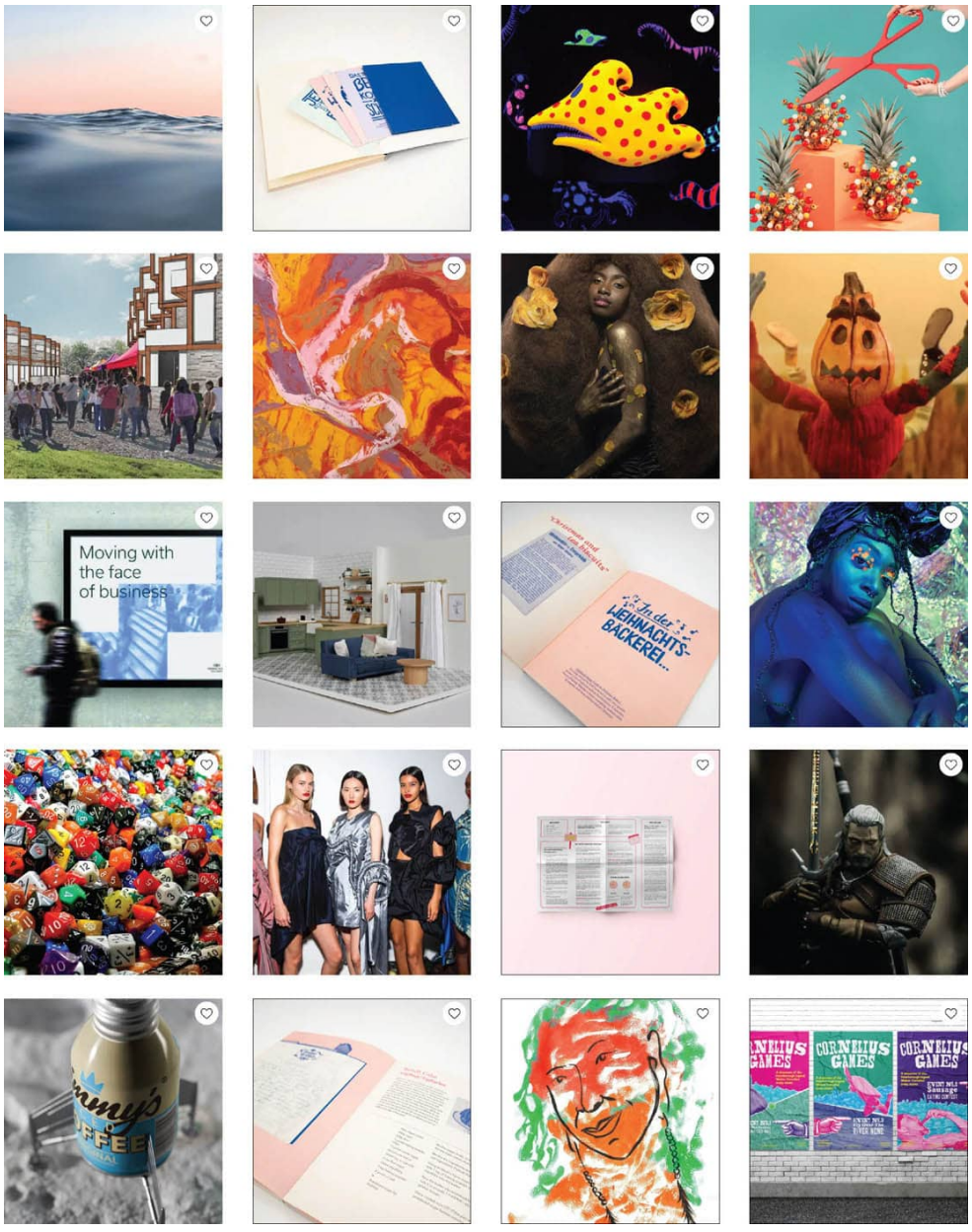
- The hierarchy of career education needed to be flipped entirely — existing platforms were structured around industries presenting to students, when students needed to be placed at the center as active discoverers.
- There was no shortage of career discovery information available, but very little of it was actually designed for young people.
- Teenagers across the UK, regardless of background, were connected to culture in some form — movies, gaming, fashion, music, coding — but consistently failed to see pathways from those interests to viable creative careers. The platform needed to make that connection legible.

Research told the team where their audience spent their time and how they moved through content. The solution needed to meet them there — frictionless, barrier free, two taps and you're in.

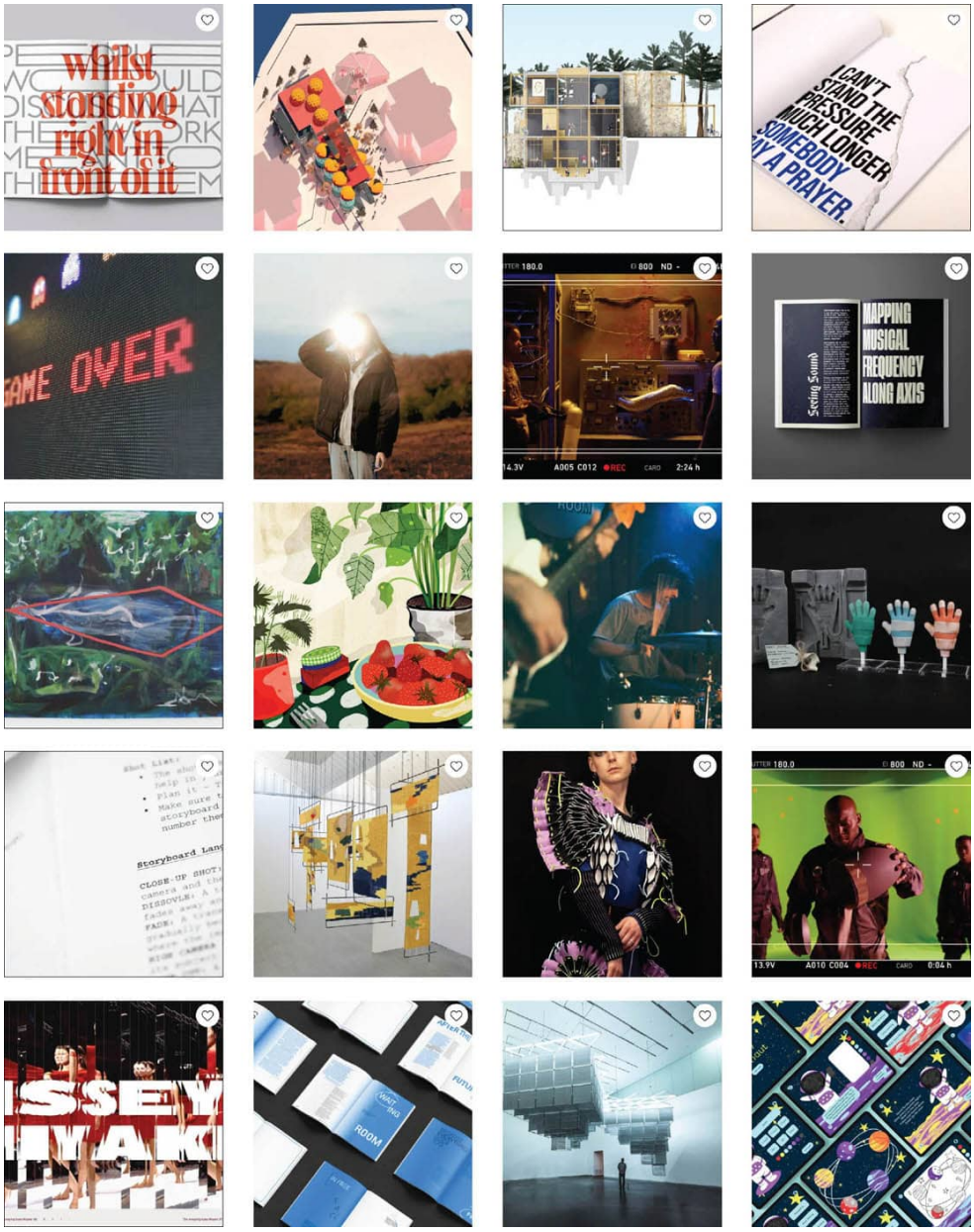
Design + Implementation: The central design decision was to utilize an image scroll. There, users encountered a continuously updated feed of work produced by students across creative disciplines and were invited to "like" what drew them in. After five likes, WonderWhat surfaced three creative disciplines to explore — fashion, illustration, architecture, and dozens more. For many users, it was the first time they had encountered these fields as real career possibilities.

Each discipline unfolded into job types, salary expectations, required skills, and educational pathways. Live job listings near the user's location made the abstract concrete and gave students the data they

needed when parents asked hard questions about feasibility. Inspirational content, including videos featuring undergraduates and early career professionals, rounded out the experience. The questions those professionals answered were shaped by asking thirteen-year-olds what they would actually want to know.



▶ Description



Students swipe through a continuously updated feed of creative work, liking what draws them in. After five selections, WonderWhat shares career pathways that match their interests, turning preference into career insight.

▶ Description

The platform launched free to access, with no barriers beyond a device and an internet connection. Its brand was developed in parallel, ensuring *WonderWhat* looked nothing like school work, signaling immediately that it was built to give students ownership of the career exploration process.

Results

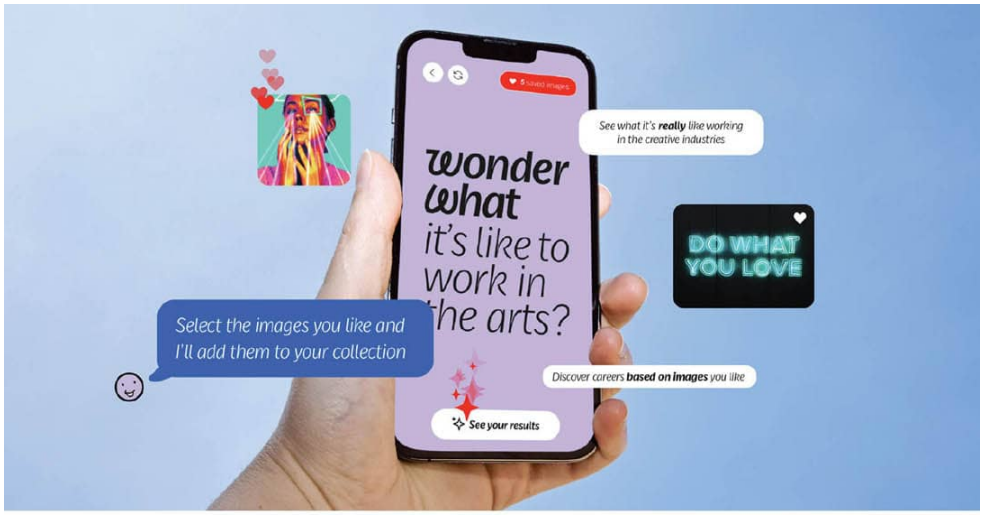
WonderWhat spread organically across the UK, adopted independently by students and within school contexts. The clearest indicator of resonance was dwell time: where many platforms measured engagement in seconds, WonderWhat regularly averaged around five minutes. The platform earned a Heist Gold award in the higher education sector and was recommended by prominent educators. Bond & Coyne worked with government departments and exam boards to extend its reach.

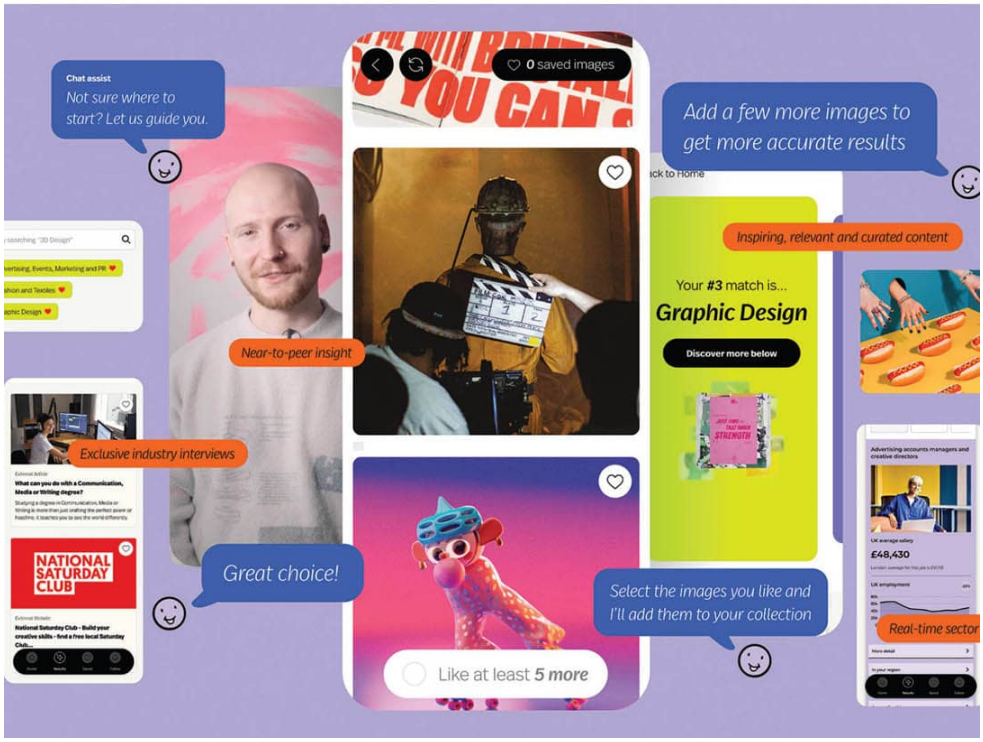
WonderWhat was Bond & Coyne's first learning platform. From it, they went on to build many others for different learners in different countries, launching Wonder Inc., a dedicated consultancy developing learning platforms for clients across the United Kingdom, the United States, and the Middle East and North Africa region. What began as an experiment to address a shrinking talent pipeline became a new entrepreneurial model and revenue stream.

For Bond & Coyne, working from research outwards and staying committed to a problem over years rather than weeks produced something that lasted, something that could be built upon. That lesson was as valuable as the product it produced.

In Practice

"*Being collaborative helped us avoid assumptions and be brave in our decision-making.*"





Once a student's interests are identified, WonderWhat delivers the full picture — job types, salary ranges, educational pathways, local listings, and video interviews with early career professionals — so students have the information they need to pursue a creative future.

▶ Description

COMPASS
YOUTH COLLABORATIVE

AUDIENCE:

Youth affected by violence, community members, funders, policymakers

CREDITS:

CO:LAB

CLIENT:

COMPASS Youth Collaborative

RESEARCH TACTICS INCLUDE:

Literature Review
Communication Audit
Contextual Inquiry
Observational Research
Photo Ethnography
Unstructured Interviews
Demographics
Psychographics
Surveys + Questionnaires
Paper Prototyping
Mood Boards
Sketching

How do you help a youth organization evolve into a violence-prevention initiative that repositions people with criminal histories as trusted community leaders? You spend more than a decade walking alongside them.

Goals

COMPASS Youth Collaborative, a Hartford, Connecticut, nonprofit, historically focused on youth development through mentorship, after-school programming, and wraparound services. However, Hartford's widening economic disparities and increasing youth violence — particularly among Black and Brown youth — required an intentional shift in mission.

COMPASS sought to expand its youth violence-prevention efforts, centering around adolescents deeply engaged in risky behavior whose circumstances were shaped by trauma and systemic inequities. The organization needed to clarify its role within the broader youth-services ecosystem, articulate how its work differed from traditional after-school programming, and strengthen relationships with stakeholders, funders, and the community. Success would be measured through reconnecting youth to education, improving employment readiness, and reducing cycles of violence and retaliation.





Peacebuilders is a violence-interruption organization rooted in the Hartford community. Its identity was built from within the neighborhoods it serves.



COMPASS Peacebuilders work across Hartford's neighborhoods, drawing on lived experience to interrupt cycles of violence. Their apparel was designed to be noticeable.

CO:LAB, a socially driven design consultancy founded by Richard Hollant, had more than a decade of collaboration with COMPASS and was eager to help reframe how their city understood youth violence, address deeply embedded assumptions, and shift public discourse. Hartford had many youth-serving organizations but no coordinated violence-prevention strategy, leaving responsibility to bureaucratic systems and law enforcement. Those most affected by violence were often labeled "high-risk" or "disruptive," excluding them from the very programs intended to support them. How could the power of

design thinking and co-creation be utilized to interrupt the cycle of violence and support behavioral change?

Research + Deliverables

Research Phase: CO:LAB's work with COMPASS spanned more than a decade of ongoing collaboration. Both entities respected the power and accountability of data-informed decision-making — in fact, COMPASS had an entire office of Data & Digital Services. They used a framework of "head, heart, and hands" to guide their approach, focused on data, relationships, and practical implementation.

Through stakeholder interviews and listening sessions the team engaged organizational leadership, individuals conducting street outreach, young people participating in COMPASS programs, and partner organizations. They then moved into contextual inquiry with an emphasis on video ethnography and field observation. This was conducted alongside the program's "Peacebuilders," who were formerly involved in gangs or street life, or had experienced incarceration and now were working across Hartford's neighborhoods to interrupt those cycles of violence. In the field, the design team observed how outreach, trust-building, and crisis response actually unfolded. In one instance, Peacebuilders persuaded a young man hiding from a rival gang and wanted by police to turn himself in before retaliation occurred. These experiences made clear that violence prevention happens in fragile, unscripted interactions that cannot be fully understood through reports alone.

Analysis + Insights: Key insights helped shape design ideation:

- The potential for impact depended heavily on establishing trust with and visibility in the community COMPASS served.
- Deliverables would need to reinforce the organization's presence across the platforms and environments where the community encountered its work.

Research revealed that COMPASS's effectiveness depended on the credibility and visible presence of Peacebuilders operating within the community. These outreach workers carried credibility that could not

be manufactured: lived experience. Their ability to connect their own background to youth facing similar circumstances allowed for intervention when violence might otherwise escalate. This reality created a design challenge. In broader public perception, individuals with these histories are often viewed through stigma rather than transformation. A central project challenge was reframing how Peacebuilders were understood and repositioning them as publicly trusted community leaders.

Design + Implementation: The rebranded visual identity was developed to be highly noticeable and optimistic. Messaging shifted from institutional language to direct, human-centered storytelling. The system was designed to function across multiple environments — from apparel worn by outreach workers to physical spaces, digital platforms, and public promotional campaigns.

Implementation occurred gradually through ongoing partnership rather than a single launch. The identity and messaging framework was first integrated into the organization's website and outreach materials, establishing a foundation for how COMPASS communicated its evolving mission. From there, the system expanded into the environments where Peacebuilders work. Because the Peacebuilders relied on trust and credibility to intervene in volatile situations, their apparel needed instant recognition that clearly distinguished them from law enforcement. Environmental graphics transformed COMPASS facilities into welcoming community spaces. Public communications increased citywide awareness, and storytelling became a critical component of that work. A documentary video and a twenty-fifth anniversary oral history series deepened public understanding of violence prevention while amplifying the voices of youth, program alumni, and the Peacebuilders — moving a previously institutional narrative toward authentic community testimony.

Results

The new visual identity increased organizational visibility — Peacebuilders could be easily recognized on the streets of Hartford, the design of community facilities propelled placemaking, social and digital assets and public-facing campaigns presented a consistent message about possibility and peace.

Over the course of their partnership with CO:LAB, COMPASS expanded from fifteen staff members to more than thirty-five while refining their focus on violence interruption and the kind of support that would help young community members reconnect to educational opportunities and employment readiness.



A refreshed visual identity and digital presence gave COMPASS a consistent, recognizable voice across streets, screens, and community spaces.

▶ Description





Through a unified visual identity, CO:LAB helped COMPASS and its Peacebuilders tell a story of possibility and peace, rooted in the communities they serve.

▶ Description

The clarity of COMPASS's narrative allowed its leadership to engage confidently in policy conversations, providing testimony to the Connecticut legislature on youth violence prevention and participating in national discussions about violence interruption and recidivism (often described as the revolving door of re-incarceration) — including multiple visits to the White House, across

administrations. Perhaps even more impactful, community leadership emerged from within the Hartford neighborhoods most affected by violence, bringing lived experience and cultural understanding that continues to reshape the organization's approach. The design system helped articulate this evolution, with co-creation principles ensuring the organization's story remains aligned with the communities it serves.

For CO:LAB, the project affirmed that design can function as a strategic framework that helps organizations align story, culture, and daily performance. The work also received recognition in professional design venues, but those accolades were never the primary measure for success. Hollant recounts that the most meaningful feedback came informally when he encountered a Peacebuilder at the mall who stopped him and simply said, "My man. That video," touched his heart, gave him a hug, and continued on.

In Practice

"I have come to believe that the true legs of an organization are not found in the colors or iconography it selects but in the universally meaningful stories those vessels carry. The visual system simply gives those stories a place to live. The design challenge is to articulate a brand in a way that allows it to expand and hold ideas and stories that are beyond the realm of imagination at the time of implementation. When those stories are grounded in lived experience — as they are with the youth, Peacebuilders, and families connected to COMPASS — the work continues to resonate long after the original design is complete."

COINBASE
LOCALIZED
BRANDING

AUDIENCE:

International cryptocurrency users

CREDITS:

Coinbase

CLIENT:

Internal project

RESEARCH TACTICS INCLUDE:

Competitor Profiling

Contextual Inquiry

Unstructured Interviews

Visual Anthropology

Personas

Color Psychology

Mood Boards

How do you make a global brand feel locally relevant without losing visual consistency? Use illustration as a flexible system, not a fixed asset.

Goals

Coinbase, an international cryptocurrency platform, faced a perception problem. While their product experiences translated well across borders, research revealed users didn't feel a local connection. For example, French users noted the app "didn't feel especially French." Similar feedback emerged from other regions — the visual language felt generic, functional but emotionally neutral.

The company wanted to understand whether localized illustration could influence user sentiment, trust, and engagement. Would culturally relevant and appropriate imagery resonate more strongly than the current corporate approach? For the design team, the challenge extended beyond creating illustrations. They needed a scalable solution — a system that would allow teams in each region to generate localized campaigns without redesigning brand assets from scratch.

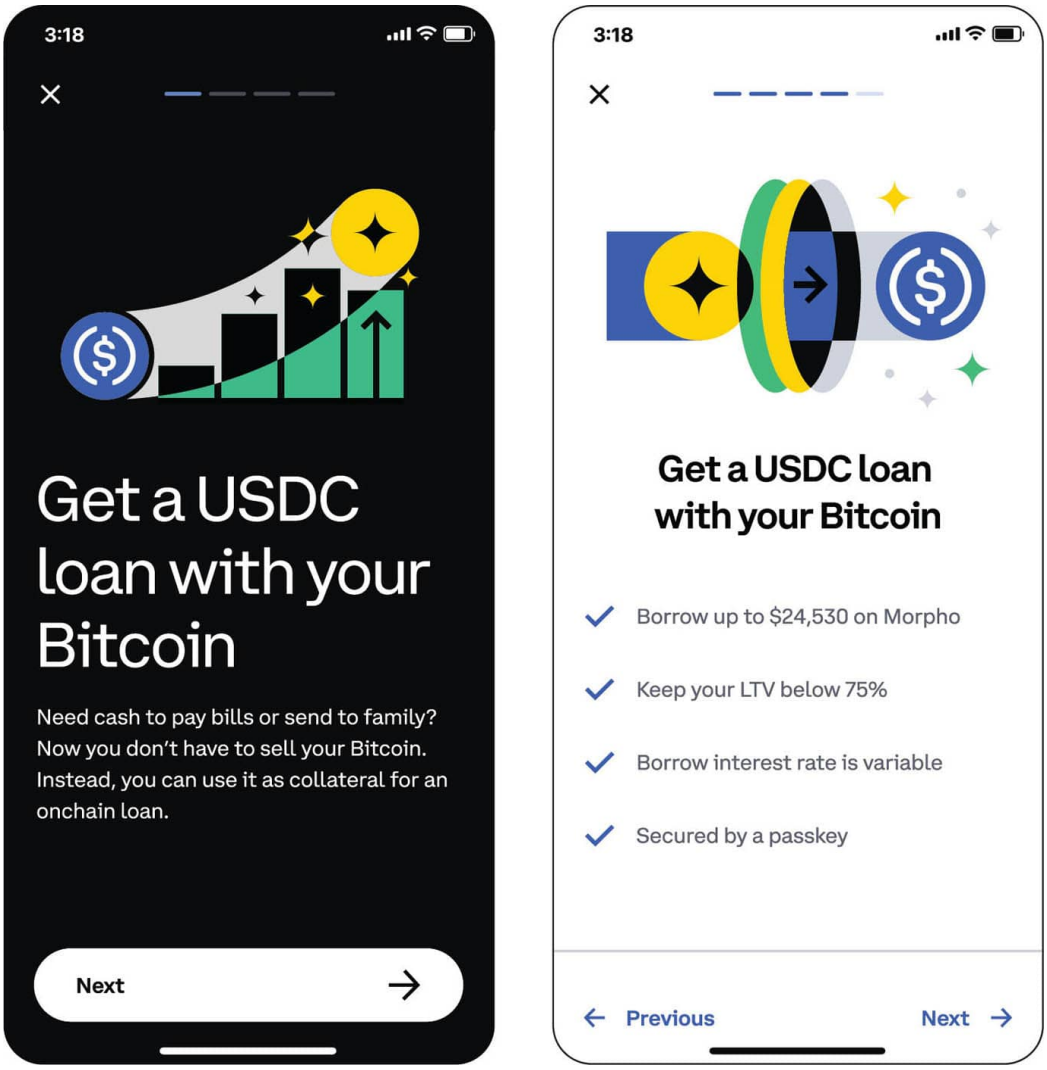
Research + Deliverables

The project focused on how visual style and cultural cues influenced brand perception in a series of global markets. Success would be measured through campaign performance in Australia, Brazil, Canada, the Netherlands, and Singapore.



To make their global platform feel locally relevant, Coinbase created a flexible illustration system that incorporated regional landmarks, color palettes, and cultural motifs.

▶ Description



Earlier iterations used standardized illustrations that struggled to create authentic emotional connections with users in different countries.

▶ Description

Research Phase: The work began with internal agreement on goals. Researchers interviewed Coinbase employees across marketing, product, and teams working on country-specific versions, along with existing and prospective users in target markets. They examined Coinbase's existing visual language and how each region interpreted imagery, symbolism, and color differently. By using contextual inquiry — watching people interact with visuals rather than just asking questions — they captured emotional responses that surveys typically miss.

Analysis of past campaign performance and cultural trends helped identify what worked in different regions. The team then sketched multiple illustration approaches to test different levels of localization. Prototypes were created for select markets and reviewed with marketing and regional teams. Feedback informed refinements before rollout, with suggestions for creating documentation and guidelines so future campaigns could launch efficiently without repeating the research process.

Analysis + Insights: Five key insights helped shape the design approach:

- Users responded positively to imagery with recognizable local landmarks or cultural motifs.
- Generic global illustrations were perceived as functional but emotionally neutral.
- Color palettes associated with regional identity increased memorability and trust.
- Overly literal cultural references risked stereotyping. Abstraction and symbolism proved more effective.
- Scalability was critical — design teams needed systems allowing localization without fully recreating assets each time.

These takeaways directly influenced the decision to create a modular system balancing brand consistency with local flexibility. Like a style guide for illustration, it would allow regional design teams to adapt compositions where cultural elements — landmarks, color accents, iconography — could be swapped while maintaining a consistent brand. The approach reduced production time, ensured visual cohesion, and aligned with the project goals for efficiency across multiple campaigns and markets.

Design + Implementation: The team created a modular set of localized illustration examples, with three visual directions per country: standard, localized, and hyper-localized. Localized illustrations were then tested against generic ones in the select markets, to see which performed better. Based on user feedback, the system was refined. That updated imagery was accompanied by a style guide outlining cultural adaptation rules, color and motif libraries for each region, and detailed usage guidelines.

The resulting toolkit balanced creative impact with practical efficiency, giving marketing teams illustration assets that quickly adapted to regional audiences while maintaining consistency with the corporate brand. By producing both finished illustrations and repeatable frameworks, the project addressed immediate campaign needs and long-term sustainability.

Results

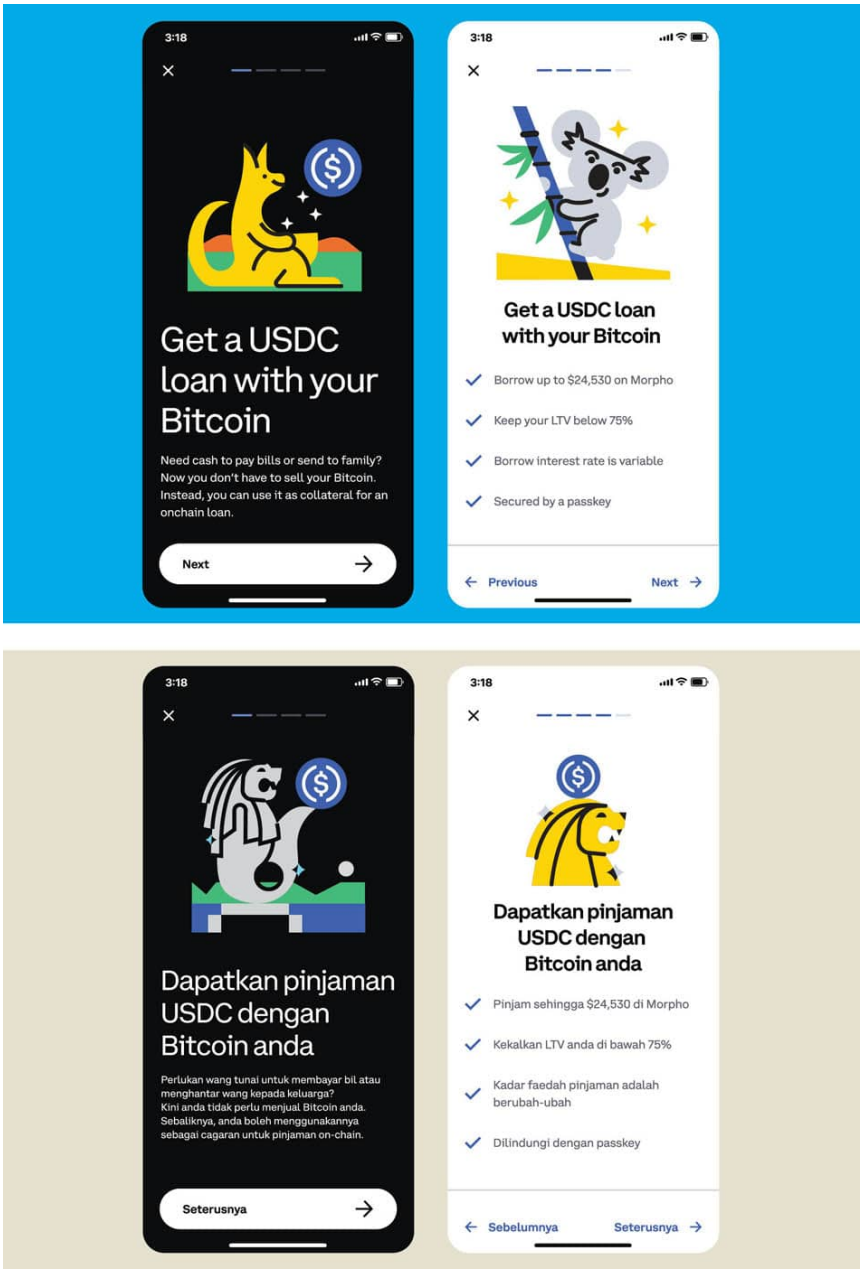
Culturally relevant imagery improved user sentiment and activity while maintaining brand consistency. Regional engagement metrics confirmed the new visuals were more authentic and better reflected local identity. For example, Brazilian campaigns using landmarks and warm color palettes resonated more strongly than generic alternatives.

Internally, the repeatable system reduced production time for future campaigns and helped marketing, product, and regional units work more effectively together. The project received company-wide recognition and became a model for future international campaigns. Illustration, marketing, and localization teams began to be brought together earlier for campaign planning. An unexpected benefit was the shift in how illustration was perceived — from decorative support to strategic communication tool tied to engagement and trust. The project also influenced later design system updates, making cultural adaptability an embedded consideration for subsequent initiatives.

For designers working across international markets, the Coinbase project demonstrates that illustration can serve as more than decoration — it builds trust through cultural recognition. The work shows that scalable systems require upfront research investment but create long-term efficiency, and that successful localization balances specific cultural references with brand consistency.

In Practice

"Contextual inquiry, observation, persona development, and competitor profiling are essential. Contextual methods reveal subtle behavioral and emotional cues that surveys miss — especially for visual perception and cultural nuance."



Regional illustrations increased emotional engagement across markets, with localized elements like cultural landmarks and color preferences strengthening user trust and connection.

▶ Description

OSGOODE PROFESSIONAL DEVELOPMENT

AUDIENCE:

Lawyers, legal professionals + executives

CREDITS:

Context Creative

CLIENT:

Osgoode Professional Development

RESEARCH TACTICS INCLUDE:

Observational Research

Focus Groups

Analytics

Card Sorting

Paper Prototyping

Personas

Sketching

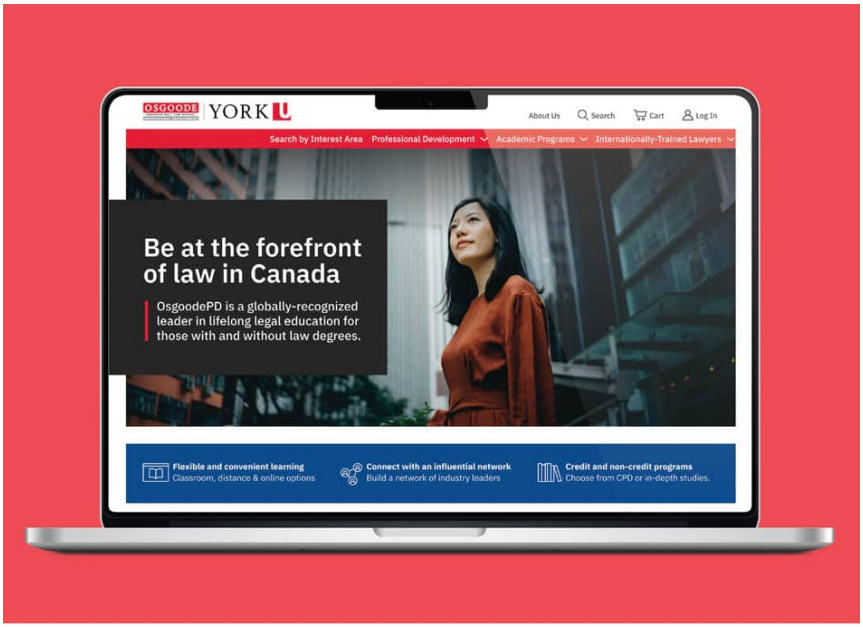
When a website is built around how an organization thinks rather than how users search, everyone loses. Osgoode Professional Development (OsgoodePD) — the continuing education arm of one of Canada's leading law schools — discovered this firsthand.

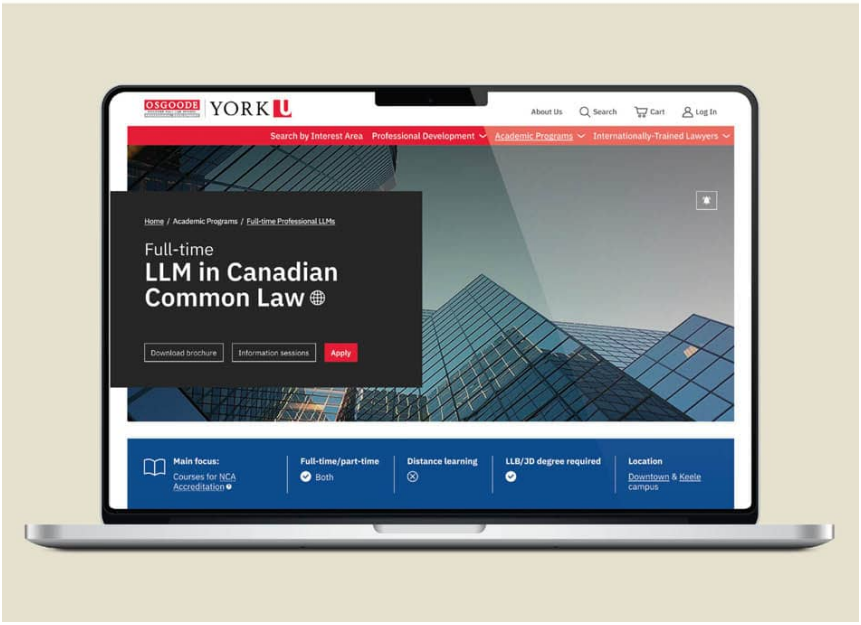
Serving lawyers meeting mandatory continuing education requirements, international legal professionals, and executives seeking legal expertise, the organization struggled with a complex, siloed digital experience that frustrated both visitors and staff.

Goals

Practicing lawyers, legal staff, and administrators came to OsgoodePD's site with different needs and varying levels of expertise. What made sense to internal teams managing content was often opaque to newcomers trying to find relevant programs.

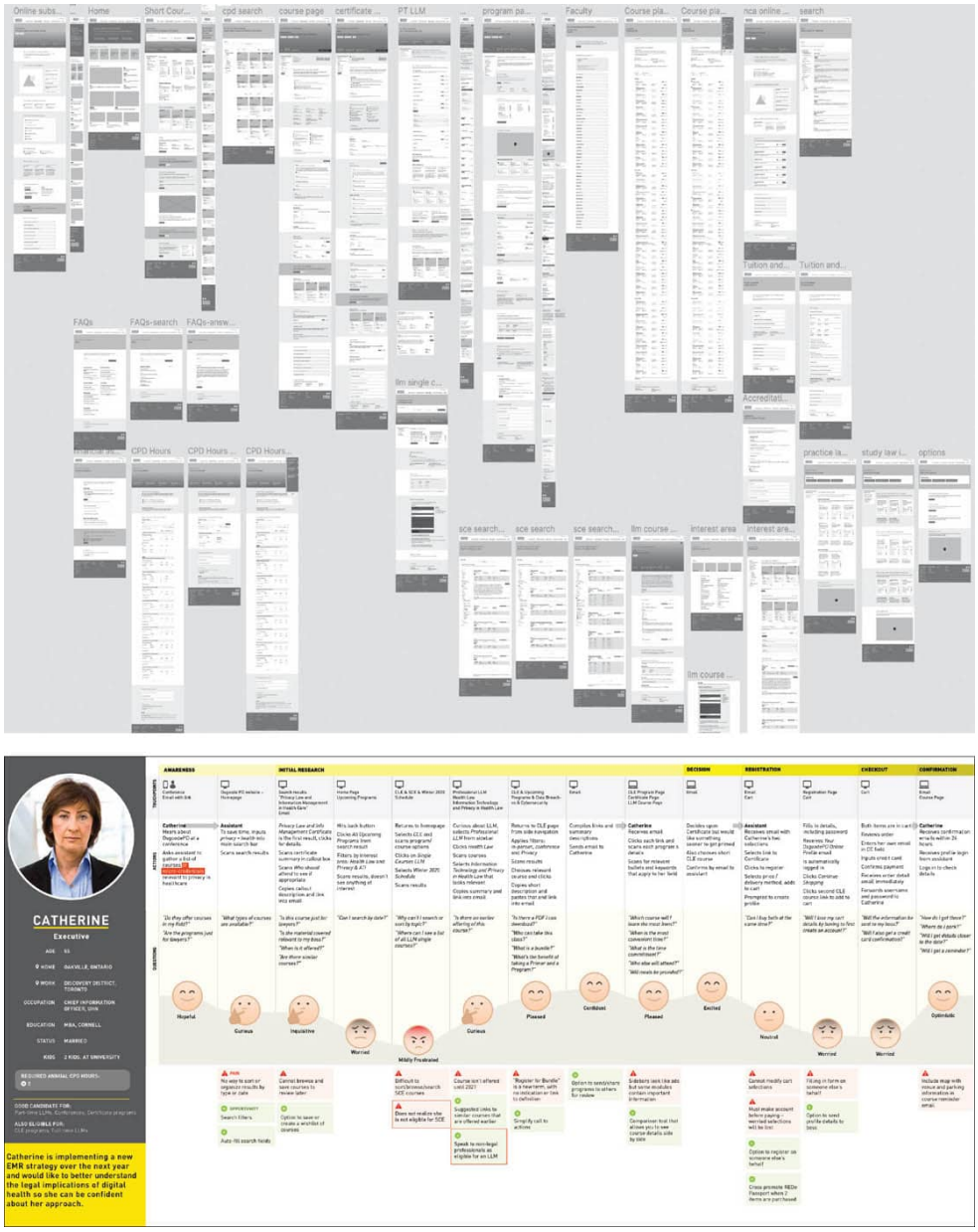
OsgoodePD wanted to improve program discoverability, clarify offerings by audience, and streamline content management. They needed a system that would help visitors quickly identify relevant programs without requiring insider knowledge of legal education terminology while also reducing the burden on staff managing hundreds of courses across multiple departments.





Context Creative redesigned OsgoodePD's website to guide three distinct audiences — lawyers, international professionals, and executives — through legal education offerings based on how they search.

▶ Description



Journey mapping revealed distinct user pathways for each audience, while wireframes allowed the team to test navigation solutions collaboratively with OsgoodePD staff before development.

▶ Description

For Context Creative, the design challenge centered on creating clear information architecture and guided user journeys. They would also have to balance visitor needs with long-term flexibility for internal content managers. A successfully revised site would be intuitive for users and improve internal workflows.

Research + Deliverables

Research Phase: Context Creative brought internal teams together for collaborative sketching and wireframing sessions. Working with the design team and each other, these sessions created shared understanding across previously siloed programs. They also revealed how the site could function as a unified experience rather than a series of disconnected offerings within departmental boundaries.

Discovery also included stakeholder workshops, observation sessions, and card sorting that revealed how people actually navigated the site. Focus groups and interviews included practicing lawyers and legal staff recruited through the client's network, providing perspectives that balanced internal expertise with actual user behavior. Internal stakeholders from OsgoodePD's programs and administrative staff participated throughout the research process.

Analysis + Insights: Visitors relied heavily on prior knowledge and terminology when navigating the site. Newcomers had to spend much more time trying to find relevant programs. Content was structured around departmental divisions rather than user needs, leading to fragmented pathways. Participants consistently preferred clear entry points, plain language, and guided navigation over exhaustive lists. Aligning programs would create a stronger, more coherent user experience.

These insights directly informed the site's information architecture, navigation, and structure. Journey mapping exposed key gaps and pain points, highlighting specific moments of confusion and drop-off. Understanding where visitors got lost allowed the team to redesign those critical decision points with clearer language and better wayfinding. The research informed decisions about classification systems, naming conventions, and entry points — ensuring each element matched how visitors actually thought about their educational needs rather than how the organization categorized programs internally.

Design + Implementation: Insights were synthesized into personas and journey maps that documented visitor pathways and friction points, making abstract problems concrete and discussable. Solutions were then translated into wireframes and prototypes that could be tested with real visitors. User testing validated approaches and identified remaining gaps before moving into visual design and development.

Results

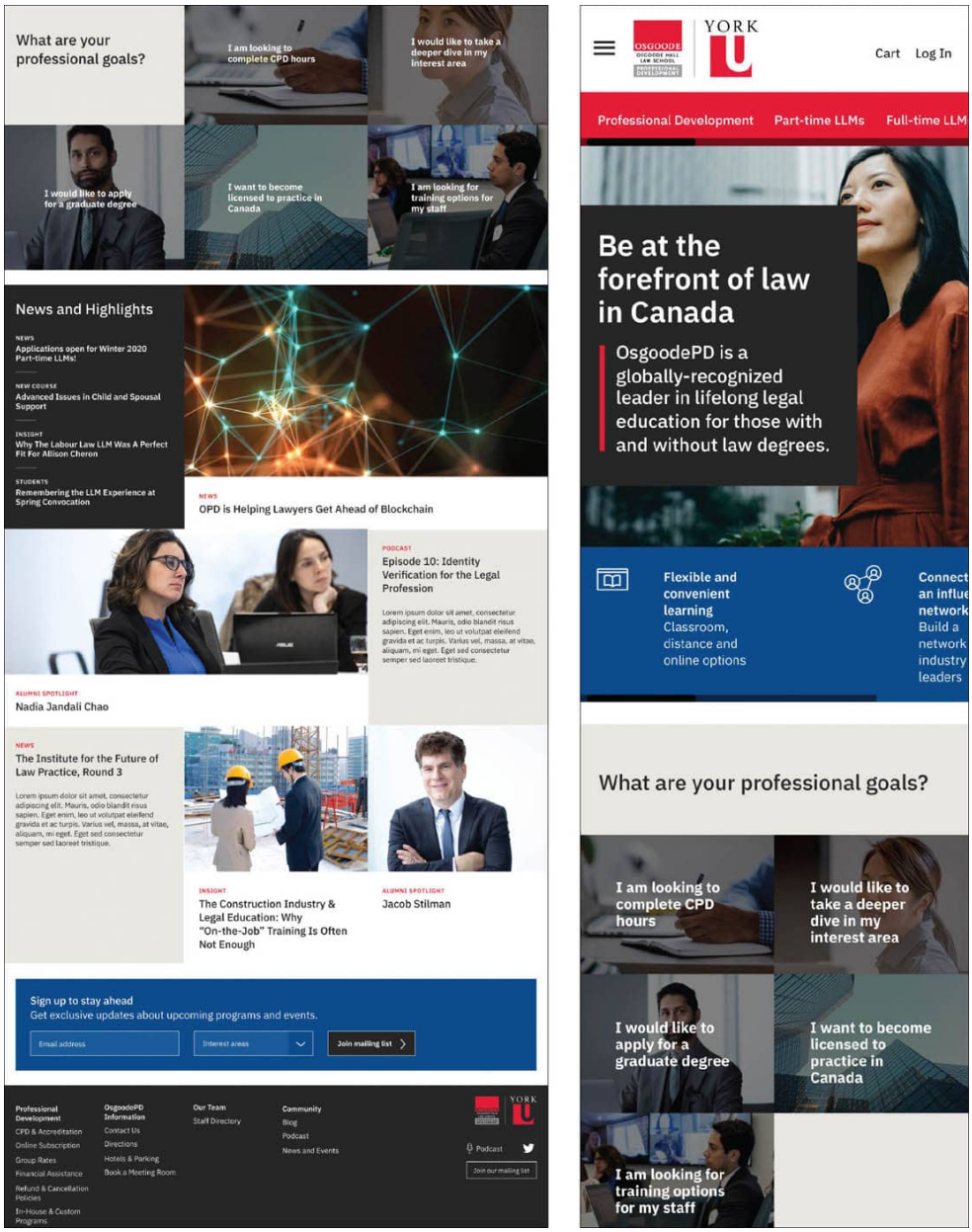
The project delivered a modern, intuitive website with an aesthetic appropriate to OsgoodePD's reputation. Built on a content management system, it gave internal teams the flexibility to manage evolving program offerings without requiring designer intervention for routine updates. The redesign improved program discovery and internal content management while elevating visual design to match what people expect from a high-quality professional organization.

Qualitative feedback emphasized improved clarity, usability, and the site's updated look and feel. The project's success also led to ongoing partnership between Context Creative and OsgoodePD, with continued collaboration on maintenance and improvements as the site evolves.

For Context Creative, the project reinforced the impact of research-led, collaborative design in modernizing complex digital platforms. Involving clients directly in research and design processes — rather than presenting finished concepts for approval — created solutions that stakeholders understood, supported, and could sustain over time.

In Practice

"Collaborative wireframing with the client is invaluable. Working through ideas together surfaces assumptions early, builds shared understanding across teams, and allows real-time testing and refinement. This creates solutions that everyone understands and can sustain."



The redesigned site provides intuitive navigation and contemporary aesthetics across desktop and mobile, making it easier for all audiences to find relevant content.

▶ Description

MSP
AIRPORT WAYFINDING

AUDIENCE:

Domestic + international air travelers, (including passengers with disabilities + non-English speakers)

CREDITS:

Entro + Alliiance Architects

CLIENT:

Metropolitan Airports Commission

RESEARCH TACTICS INCLUDE:

Contextual Inquiry

Observational Research

Focus Groups

Surveys + Questionnaires

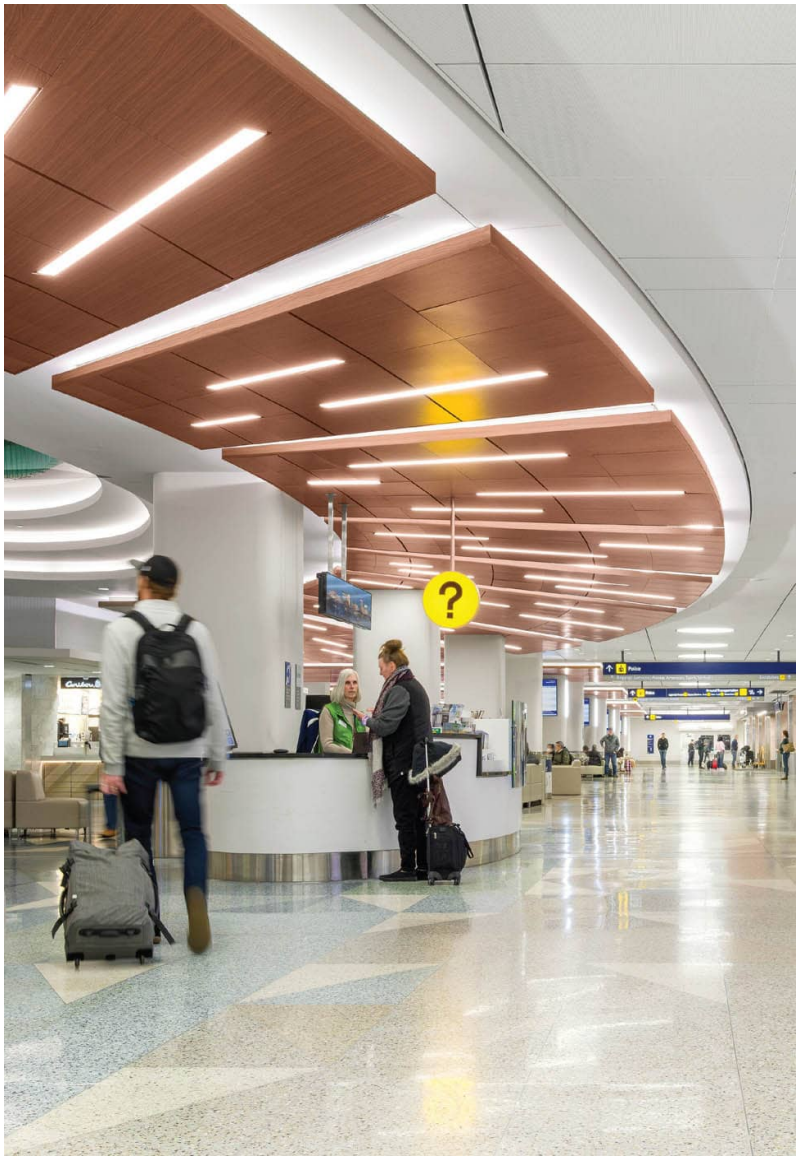
How do you design wayfinding for an airport that never stops changing — where gates shift, airlines move, and passenger needs evolve constantly? You build a system designed to adapt, not just launch.

Goals

Minneapolis–St. Paul International Airport (MSP), the largest and busiest airport in the Upper Midwest and a key hub for Delta Airlines, faced the challenge of replacing an outdated wayfinding program during the redevelopment of Terminal 1 and expansion of Terminal 2. The airport needed a system that could improve consistency across the campus, enhance accessibility and inclusivity, and create a calm, intuitive passenger experience.

MSP's goals extended beyond basic navigation. The airport sought to implement dynamic signage with real-time data integration, improve overall operational capacity, and position itself as a leader in passenger experience. Success would be measured through passenger satisfaction metrics, including industry rankings from J.D. Power and Airports Council International (ACI) North America.

For Entro, the Toronto-based environmental design firm working alongside Minneapolis-based architectural firm Alliiance, the challenge was to create a flexible, scalable wayfinding system that could evolve alongside changing airport operations. Arriving at the airport brings a mix of emotions — excitement, anticipation, and often anxiety. The design team's goal was to help people clearly understand where to go and what to expect, reducing tension and starting their journeys with an increased sense of safety and calm.



Entro redesigned wayfinding across the Minneapolis–St. Paul International Airport, creating a flexible, accessible system that helps millions of travelers navigate one of the Upper Midwest's busiest transit hubs.

Research + Deliverables

Research Phase: The project required understanding both passenger needs and operational realities. Research focused on passengers through surveys and user testing, as well as key stakeholders including airport staff, facilities management, airport police, IT teams, and the Travelers with Disabilities Advisory Committee (TDAC).

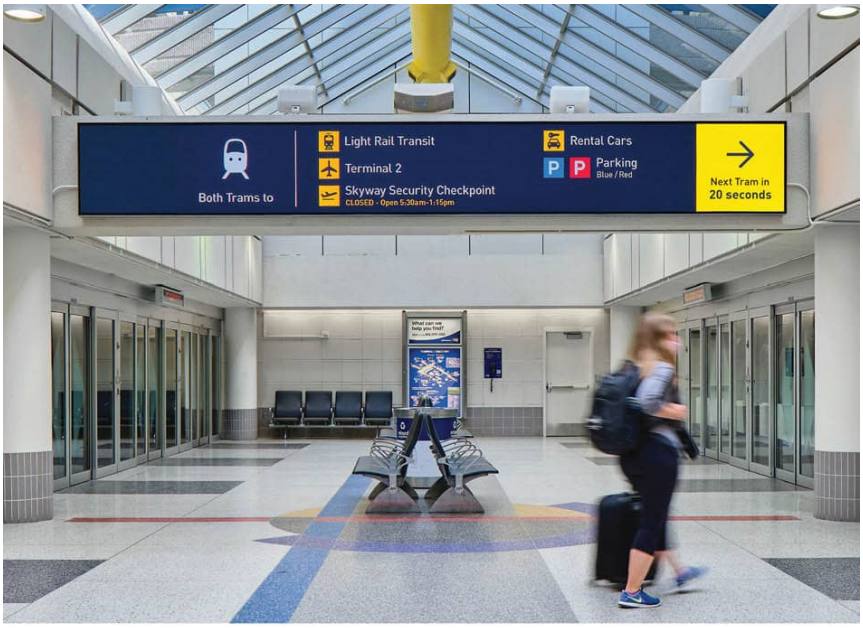
Working closely with the airport's customer experience team, the design team developed surveys to gather feedback from airport staff and volunteers. Ground transportation emerged as one of the most challenging destinations for customers to understand and navigate. The team identified specific points where confusion occurred and what information proved most critical during different stages of travel.

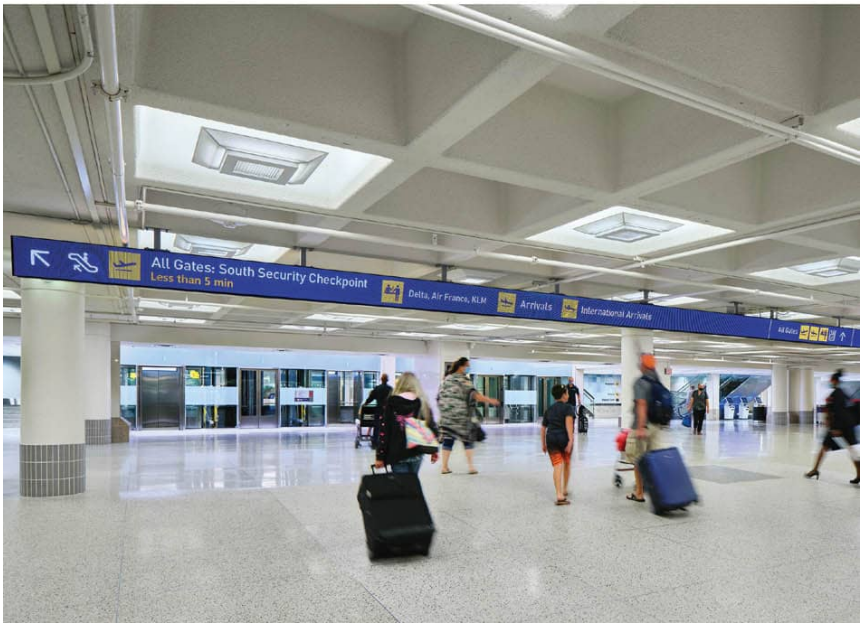
Analysis + Insights: Research highlighted several critical factors shaping design decisions. Clear information hierarchy and simple nomenclature was essential. Passengers needed intuitive navigation that reduced stress, rather than added complexity. The value of real-time information became clear through passenger feedback — during delays or gate changes, passengers needed immediate updates to make informed decisions.

Input from the accessibility specialists at the TDAC ensured the new system would serve all passengers, not just meet legal standards. That accessibility research went beyond standard code requirements. For example, when designing tactile maps for pet relief facilities, the team needed to communicate room layout and the location of key amenities. However, feedback from the TDAC revealed that standard tactile symbols were overly complicated for users to understand by feel. The design team would need to develop more intuitive tactile symbols that passengers could actually use.

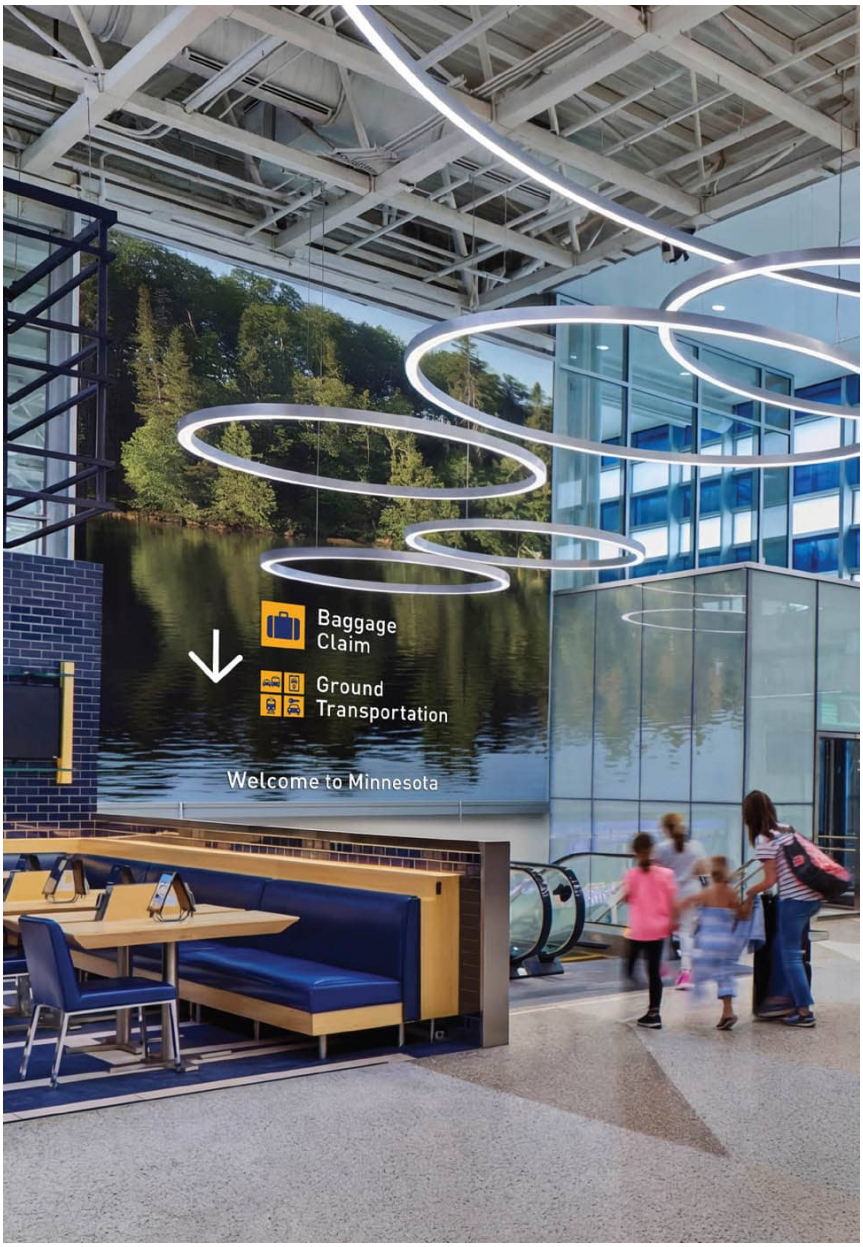
Research also revealed that wayfinding systems in airports cannot remain static. Gates change, airlines move terminals, construction

redirects traffic, and passenger flows shift constantly. The system needed to be designed for continuous adaptation.





Entro led strategy, design, and system integration across a complex network of architects, engineers, IT teams, and airport stakeholders, with digital content integration enabling real-time updates throughout the system.



Entro designed a modular, data-driven wayfinding system built to evolve, with dynamic digital signage, tactile elements, and flexible components that adapt as the airport changes.

Design + Implementation: The design team created a comprehensive wayfinding system built on flexibility and modularity.

Dynamic digital signage with live data integration became a cornerstone of the approach. Digital roadway signs were positioned to direct drivers to curbside services upon approach to the terminal. Curbside medallions identified accessibility access points and the

airline check-in counter closest to each entrance so passengers didn't have to carry luggage further than necessary. Inside Terminal 1, a sixty-foot digital sign spanned the transit area, informing travelers of security checkpoint locations and current wait times. This was designed to facilitate real-time decision-making and avoid unnecessary crowding — allowing passengers to choose the shortest line rather than guessing.

Alliiance created an illuminated ceiling installation that directed attention toward escalators, the primary exit from the arrivals level. There, passengers also encountered large-scale digital imagery alongside the wayfinding messaging — quickly finding their way while experiencing a moment of artful inspiration.

To welcome diverse guests — those using multiple languages or with varied accessibility needs — the team incorporated large, bright pictograms with universally recognizable symbols; included tactile messaging and Braille on identification signage and elevator panels; and promoted the ARIA visual interpreting service and T-Coil hearing impairment services.

Physical signage was developed as a modular system, allowing components to be updated, reconfigured, or replaced as airport needs changed. Standardized wayfinding guidelines established consistency across the campus while maintaining flexibility for future modifications.

Implementation involved close coordination between design teams, architects, construction crews, IT departments, and airport stakeholders. Regular meetings and stakeholder engagement ensured alignment between wayfinding strategy and operational requirements. The approach was designed to support continuous evolution, creating a living framework for improvement based on passenger feedback, operational data, and changing conditions.

Results

The wayfinding system successfully improved passenger navigation, efficiency, and overall experience while enabling the airport to adapt quickly to operational changes. MSP achieved top rankings from J.D. Power and ACI North America, with wayfinding consistently identified as a key factor influencing passenger satisfaction. Skytrax, an international airport rating organization, voted MSP the top airport in North America, and *Travel + Leisure* recognized the airport's passenger experience improvements.

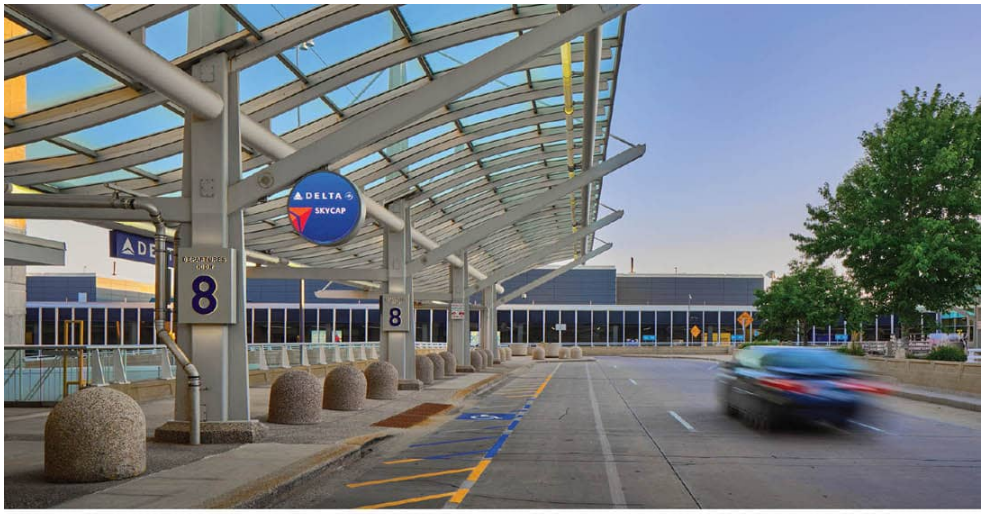
Beyond satisfaction metrics, the system delivered practical operational benefits. Improved wayfinding increased revenue by making amenities more visible and accessible to passengers. Enhanced accessibility served diverse passenger populations more effectively. Better navigation improved emergency responsiveness, allowing airport staff and first responders to communicate locations more clearly during incidents.

The dynamic signage system proved its value during operational disruptions. When gates changed or flights moved, real-time updates reached passengers immediately, reducing confusion and improving airport efficiency. The modular physical signage allowed quick adjustments as the airport evolved.

For Entro, the project demonstrated leadership in creating large-scale, future-ready systems for airports and other complex environments. It also reinforced the value of treating wayfinding as a continuous process rather than a completed deliverable. By building adaptability and improvement into the system, they created a design that remains relevant and effective long after initial implementation.

In Practice

"Process is built on alignment — between architectural vision, user needs, and the systems that tie them together. Ideation gives way to prototyping, and prototyping gives way to testing, with feedback loops that keep refinement ongoing rather than episodic. By the time we reach implementation, the solution has been shaped by every voice that matters."





Wayfinding extended beyond the terminal doors, with exterior signage ensuring a seamless, unified navigation experience from curbside to gate.

EXPERT **VOICE**



Penina Acayo Laker
Associate Professor
Washington University, St. Louis

INTEGRATING CO-CREATION METHODS IN YOUR DESIGN RESEARCH WORK

Co-creation is about shifting from being the person with all the answers to designing with those affected by the issues you are striving to address.

I'm a designer with a community-engaged research practice. Through my research and creative practice, I strive to address complex social issues by working alongside colleagues from other disciplines and people affected by these issues.

I believe design is a powerful tool for driving positive social change. Its impact deepens when paired with a participatory approach like co-creation that recognizes community members as experts in their own lives. Together, these practices allow me to build trust, collaborate meaningfully, and create solutions that are culturally relevant, accessible, and compelling enough to inform, persuade, and inspire change.

There are two things that have stuck with me since doing community-engaged design work for the past ten-plus years:
1) Addressing complex societal issues requires working in an interdisciplinary way and active participation from the people most affected by the issue.
2) People don't always do as they say; therefore, observing what people create often reveals deeper insights into their needs and perspectives than any

interview, survey, or focus group ever could. This is where co-creation comes into play. It's a design strategy that designers can use to inspire and encourage participants to create solutions that could improve their lives.

Co-creation involves several activities across all stages of the design process (from idea generation to implementation and evaluation), and it's the designer's role to plan and facilitate these activities clearly so that all audience members, regardless of design knowledge, can participate meaningfully and productively.

When designers step into the role of facilitator, a few big questions emerge. Which projects are actually a good fit for co-creation, and when is the right time to bring people into the design process? What's the best way to plan and run meetings with audience members and stakeholders? What works better and allows for maximum participation: in-person or online? What tools — activities, props, materials — help people feel comfortable enough to engage in the design process? How do you keep the energy and momentum going all the way from the planning stages to the final outcome? And how do you stay intentional in executing your design choices while still leaving room for the unexpected? These are a few questions worth answering from the get-go.

Co-creation works best and is an appropriate participatory model when a few key conditions are in place. First, there needs to be a genuine desire for shared decision-making — meaning both the designers and the people most affected by the issue are invested in the topic at hand. You also need a group of willing participants or stakeholders who are ready to engage, along with enough time to plan and execute the activities thoughtfully. And perhaps most importantly, it works best when the researcher or client has an open mind — no fixed idea of what the final outcome should look like, just a real openness to let the process lead to a relevant solution.

In a recent collaborative research project between designers and public health practitioners at Washington University in St. Louis, we engaged eight local youth and adults (over the course of two months) in a co-creation process to build mental health tools for teens. We applied this interconnected five-phase framework to guide the integration of co-creation activities into our research process, and here's how it can guide yours:

- **Planning:** Involves defining your goals, setting a timeline, and identifying who your co-creators will be.
- **Discovery:** Uses surveys, small-group discussions, or one-on-one conversations to understand the "why" behind the problem — in this case, to uncover why it's so hard for teens to talk about identity.
- **Ideation:** This is where you bring your audience into the same room, not just to react to your ideas but to generate new ones and build on what already exists. Those ideas then move into the next stage — prototyping.
- **Prototyping:** Where you make your ideas tangible together with participants, starting with rough, low-fidelity paper sketches. Honest feedback flows more naturally from something

unfinished than from a polished design.

- **Refinement:** Where you test, tweak, and repeat until you land on a refined solution that best meets the goals and needs of the audience members.







From collaborative workshops with teens and adults in St. Louis to finished product. Over 900 conversation-starter cards were designed to help adolescents talk openly about identity and mental health.

▶ Description

For our team, this process took two months — three planning sessions to frame the research questions and five co-creation panel workshops to generate ideas and refine concepts for potential prototype interventions to foster discussions between adolescents and adults.

At the end of the project, we distributed over 900 sets of conversation-starter cards to teens across St. Louis. We didn't get here because our design team had the best design ideas — it happened because we listened to our community partners and created the most appropriate solutions with them.

The goal of co-creation isn't to achieve "perfect" facilitation or participation; it's about making sure the people you're designing for have a seat at the table. Start small, be a good listener, stay humble, and remember: The community is the expert on their own lives. Your job is to help them be active participants in designing, implementing, and evaluating the proposed solution. You can practice your facilitation techniques with your team before you go out to engage with the target audience.

Co-creation is about shifting from being the person with all the answers to designing with those affected by the issues you are striving to address. Instead of just designing for an audience, you involve them directly in the process from day one. Whether you're tackling a public health crisis or creating a website to support fundraising efforts for a non profit organization, involving the people most affected ensures your solution is relevant, feasible, and sustainable.

CANANDAIGUA
NATIONAL
BANK

AUDIENCE:

Banking customers (existing and potential), employees, community members

CREDITS:

Hale Design

CLIENT:

Canandaigua National Bank

RESEARCH TACTICS INCLUDE:

Literature Review

Communication Audit

Competitor Profiling

Unstructured Interviews

Demographics

Focus Groups

Surveys + Questionnaires

Can a traditionally risk-averse institution evolve to attract new and younger customers and expand markets without losing the trust they've built with previous generations?

Goals

Canandaigua National Bank, a family-owned financial institution in Rochester, New York, was preparing for leadership succession as the current CEO approached retirement. His son, the incoming leader, recognized the transition as an opportunity to articulate the bank's vision and direction. What began as a website update revealed deeper challenges: the bank's visual identity had grown dated, and staff struggled to articulate what differentiated Canandaigua from other financial institutions. Leadership had aspirations to move into new markets. To do so, they needed to know what customers prioritized in banking relationships. How could Canadaigua leverage years of consumer trust and revered institutional values into a modern banking experience that positioned the organization for growth?

Research + Deliverables

Research Phase: Hale Design developed a research plan that would help them understand current brand perceptions, analyze industry trends, and identify customer targets. They used multiple methods to triangulate findings and identify opportunities.





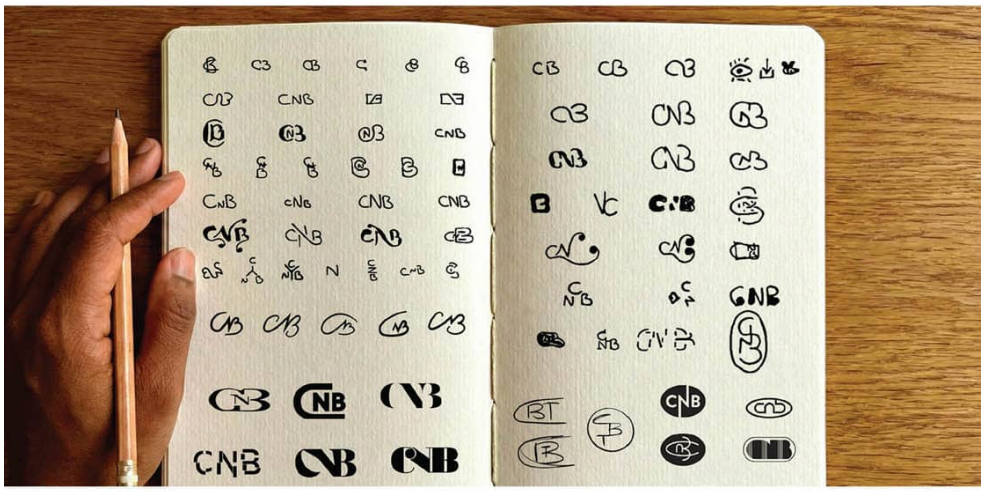


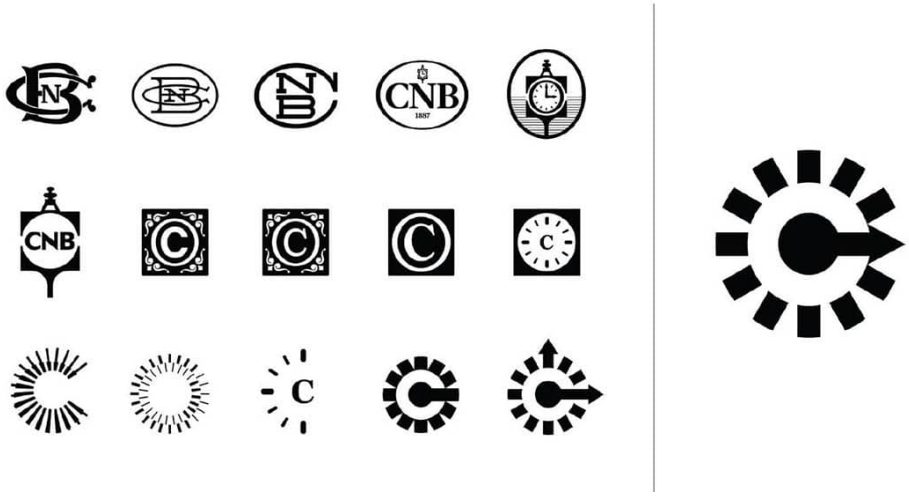


The rebrand extended across all customer touchpoints — exterior signage, debit cards, and reusable bags — ensuring consistent brand presence and turning customers into mobile brand ambassadors.

▶ Description

Canandaigua National Bank™





Hale Design used sketching to rapidly explore logo variations, refining the mark through multiple iterations to create a contemporary identity that still felt rooted in the bank's legacy.

▶ Description

To focus on brand perceptions, the team conducted internal interviews and surveys with more than eighty employees, spanning organizational hierarchy from executive leadership to retail bank tellers. A company-wide survey generated nearly 500 employee responses from locations across multiple states. Externally, focus

groups included both current customers and those who didn't currently bank with Canandaigua, segmented by life stage — young professionals, families, empty nesters, and retirees — to understand different financial needs and perceptions. In addition, unstructured interviews captured unexpected insights.

To analyze industry trends, they undertook a literature review and media-scanning process to establish context. Internally, communication audits examined how the bank currently spoke about itself. Client and competitor profiling positioned Canandaigua within the competitive landscape.

Analysis + Insights: Four key insights emerged and reshaped the project.

- Customers and employees felt deeply connected to the brand but struggled to describe what was unique about Canandaigua.
- Customers and employees valued the same things the institution did. That positive alignment was strong, but unexpressed.
- Customers and employees referred to the institution inconsistently — CNB, Canandaigua, Canandaigua National Bank, Canandaigua Bank. This created linguistic fragmentation.
- Non-customers weren't sure what the logo looked like and knew little about offerings. The challenge was lack of awareness rather than negative perception.

These insights directly informed design decisions. Research findings were synthesized into personas that helped identify target customers. A brand strategy was developed and established parameters for a visual system that would support an institution with significant heritage while appealing to younger audiences who banked through online and digital channels. The aesthetics needed to signal both continuity and evolution. Mood boards were assembled to make the abstract more concrete.

Design + Implementation: Research informed both strategy and design. The team established brand positioning, messaging frameworks, and a narrative structure that gave employees clear language for talking about the bank. A complete visual identity system, including logo, color palette, typography and imagery standards, was designed and applied across every touchpoint where

customers and employees encountered the brand — from business cards and signage to website design and digital templates. Comprehensive guidelines ensured internal teams and external partners could maintain consistency as the brand evolved.

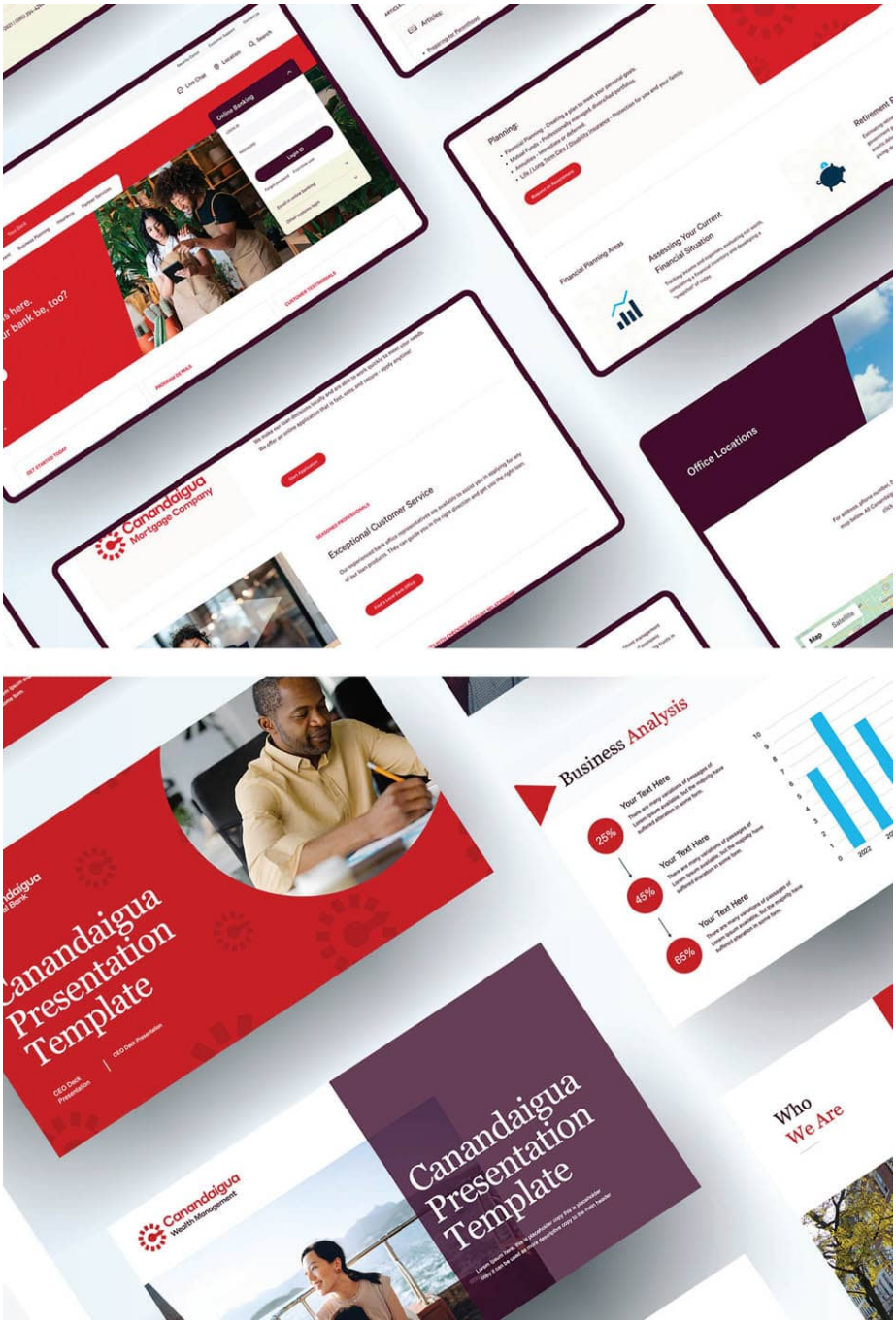
Results

The launch received strong positive responses from both existing and prospective customers, striking a balance between honoring heritage and appealing to contemporary audiences. Employees finally had the language to explain what made Canandaigua different, enabling staff to consistently communicate the bank's uniqueness across customer interactions.

The project revealed the depth of stakeholder investment. Customers, employees, and community members had strong personal connections to Canandaigua that went beyond typical brand loyalty. Hale Design's emphasis on dialogue and listening during the research phase created opportunity for those stakeholders to be part of shaping the rebrand. That collaborative approach, in turn, produced solutions that everyone understood, supported, and could sustain, resulting in a smooth adoption. Grounding creative decisions in real-world context created a durable solution that Canadaigua successfully employed to enter new markets and enhance existing relationships.

In Practice

"*We encourage designers to use research methods that prioritize context, empathy, and real-world behavior over abstract inputs or assumptions. The goal isn't more research — it's the right insight at the right moment.*"



The identity, applied across the website, presentations, and diverse brand materials, conveys a modern, friendly, and approachable tone — elevating CNB in a crowded regional banking market.

▶ Description

PLURAL
REBRAND

AUDIENCE:

Corporate clients (legislators, policy professionals, enterprise software buyers)

CREDITS:

New Kind

CLIENT:

Plural (formerly Civic Eagle)

RESEARCH TACTICS INCLUDE:

Literature Review

Communication Audit

Competitor Profiling

Unstructured Interviews

Personas

How do you rebrand a fast-growing company when everything — name, story, and visual identity — needs to change at once? Run parallel research and design sprints, and treat every decision as a prototype.

Goals

Civic Eagle, a Minneapolis-based software company helping organizations track and influence legislation, had outgrown its startup brand. A number of developments drove the need for change. Their digital platform had evolved beyond just tracking bills — it now helped users shape policy outcomes. The company wanted to signal enterprise readiness and enter international markets where name and visual identity needed to work across cultures. They were in the process of integrating an open-source community into their business. Success would also mean getting everyone in the organization on board with a new brand that could grow with the company.

Civic Eagle had strong convictions about the potential impact of their technology and needs of their users. They wanted to translate those convictions into a story that would resonate with a growing corporate client base.

For New Kind, the design studio leading the transformative work, the challenge extended beyond deliverables. They wanted to prove that research and design could move together, creating, testing, and refining in real time without sacrificing quality.

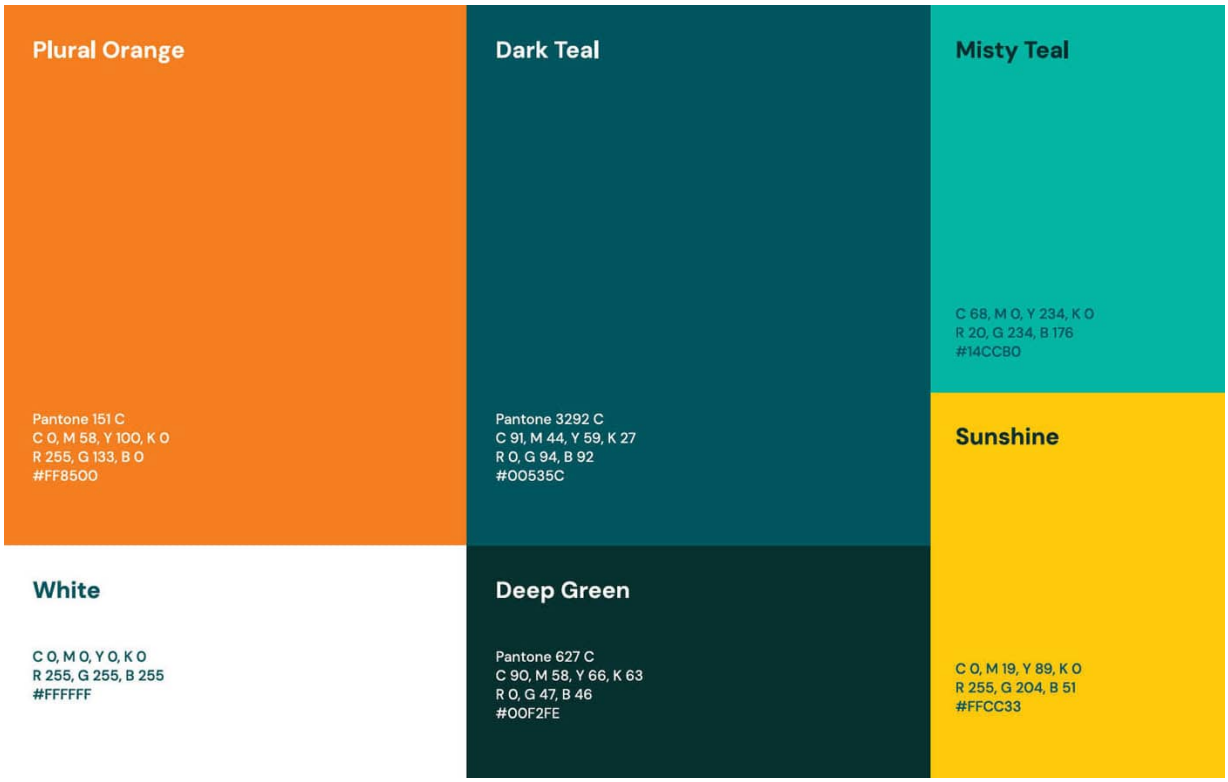


The new Plural identity system integrated logo and directional graphic elements with photography, visually expressing the brand's focus on shaping policy outcomes rather than just tracking legislation.

Research + Deliverables

Research Phase: The work began with New Kind and Civic Eagle agreeing on goals and a timeline. The team interviewed three Civic Eagle stakeholders, the cofounders and VP of customer experience, plus two of their customers who were actively using the platform in policy work. Conversations with users proved especially valuable, revealing language the Civic Eagle team couldn't generate themselves: how policy professionals describe the emotional weight of their work and what it means to influence legislative outcomes.

New Kind conducted communication audits and competitive landscape reviews to establish a baseline. For naming, they invited Civic Eagle to participate in collaborative ideation, generating broad directions that would be refined into final candidates.



Orange became the foundation for Plural's color palette, carefully chosen to navigate political associations while building a color system that signals both credibility and accessibility.

▶ Description

Analysis + Insights: Key take aways from research findings shaped the work:

- Experienced policy professionals were resourceful and proud of their existing systems. Any positioning had to respect that identity while offering a clearly better path forward.
- Policy professionals consistently described their work as "shaping" policy, not just tracking it. They were focused on influencing outcomes, not passively monitoring bills. That language became an organizing idea.
- Color and language carry political weight. For a company committed to nonpartisan civic data access, every decision — from palette to wording — required careful consideration. The brand needed to signal credibility and neutrality without feeling sterile. Orange emerged as a direction that avoided the immediate American political associations with blue or red.
- Two products, an open-source community and commercial software, needed to coexist without confusion. The naming strategy had to allow expansion in multiple directions without locking the company into a position it might outgrow.
- The community dimension was a genuine differentiator. Roots in civic technology and open data gave Civic Eagle something competitors didn't have.

These insights provided a foundation that allowed the team to move quickly and with confidence.

Design + Implementation: Rather than completing each phase before moving to the next, the team ran positioning, messaging, naming, and visual identity in overlapping work cycles. This meant becoming comfortable making decisions while other components were still in progress — for example, they developed visual directions before naming was finalized.

Positioning around "shaping policy" reflected how users described their work. Visuals — modular, upward-pointing forms suggesting amplification — grew from verb exploration in the research stage: reveal, guide, amplify, shape. The brand story, including the phrase "Democracy's second gear," translated policy-professional language into something a broader business audience could understand.

The project unfolded over six months, starting with the framing research. This informed positioning and messaging done in partnership with Civic Eagle leadership. Early versions of the brand direction were tested as they worked on naming. The naming process required education around naming strategy, collaborative

idea generation, and legal approval. New Kind developed the brand story, visual identity, and graphics in parallel, incorporating the new name — Plural — as they went.

Results

Plural launched positioned for growth. The rebrand gave the sales and marketing team a coherent story and visual identity signaling maturity and confidence. The entire organization gained shared language around who they were and why it mattered.

The VP of marketing noted at launch, "We couldn't have done it without New Kind. They guided us through the entire process of determining our new brand, including our name, logo, and brand manifesto." When the brand story was first presented in designed form, she said it gave her goosebumps.

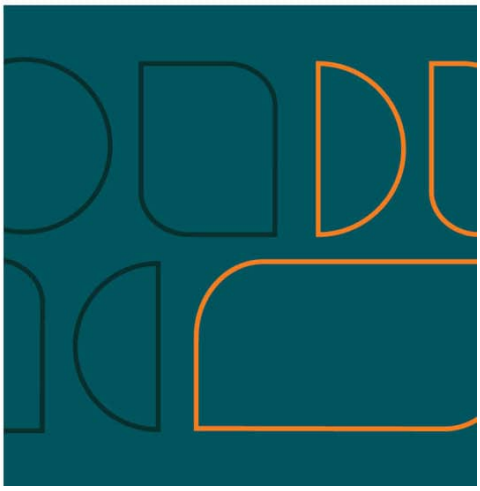
The methodology refined on the Plural project became a core part of how New Kind operates. The project demonstrated that research and design can move together and that early testing reduces risk by revealing problems before they become expensive. The naming process, built as an exercise for the creative team and the client team, became a template for collaboration. Education sessions introduced before ideation gave participants shared language and criteria, making working sessions more productive and decisions more durable. The design team emphasized "direction over perfection" in their working sessions, and the trust they had built with their client allowed for finding the opportunity in ambiguity. Breaking the project into sprints provided time for reflection and revision without the paralysis of sequential perfection.

In Practice

"*All research methods matter — but not because of specific tools. What's important is creating a learning journey where the goal is to translate ideas and make them tangible so everyone can try them on, test them, validate them, and contribute along the way. Stakeholder interviews surface tensions worth tackling. Mood boards and prototyping let teams experience directions before committing. Asynchronous ideation brings diverse thinking into the process without slowing it down. The method matters less than the philosophy: research isn't about proving you're right — it's about building shared conviction through exploration.*"







The rebrand translated across diverse applications — from advertising to branded merchandise — providing a coherent visual language that positioned Plural for growth beyond its startup origins.

▶ Description

THE MAX COLLABORATIVE

AUDIENCE:

Real estate development partners, institutional investors

CREDITS:

Opal

CLIENT:

The Max Collaborative (formerly Forest City Realty Trust founding families)

RESEARCH TACTICS INCLUDE:

Communication Audit

Competitor Profiling

Photo Ethnography

Unstructured Interviews

Mood Boards

Sketching

When Forest City Realty Trust was sold, its founding families needed more than a name for their new venture — they needed an identity that honored decades of iconic work while charting an independent path forward.

Goals

When the privately held trust was sold, members of the founding families re-emerged as separate entities, with one side seeking to establish a new collaboration.

The challenge extended beyond typical startup branding. The new entity carried an extraordinary legacy — Forest City had developed iconic projects including the New York Times Building and 8 Spruce in New York; the Yards in Washington, DC; University Park at MIT in

Cambridge, Massachusetts; and Central Park in Denver, Colorado. The partners needed an identity that acknowledged and honored this history without being defined by it. They sought to convey the experience and integrity of senior leadership while welcoming future possibilities.

For Opal, the challenge would be to translate intangible qualities — the insight of partners with decades of experience, relentless discipline on projects spanning twenty to thirty years, appreciation for meticulous craft — into coherent brand language.



The Max Collaborative develops iconic properties like 8 Spruce and needed a brand that conveyed the same meticulous craft and design excellence that defines their real estate portfolio.



Opal developed a complete visual identity system — from strategy and naming through business cards, stationery, and all brand touchpoints.

▶ Description

Research + Deliverables

Research Phase: Opal's research process prioritized deep immersion into the project's history. Because the client valued patience and thoroughness, the timeline allowed extended investigation into family archives and professional legacy. The team conducted extensive interviews with eight to ten partners, revealing first hand accounts of building landmarks that shaped American cities. Interviews were supplemented by a communication audit examining historical materials including photographs, annual reports, and family documentation.

Research extended to competitor profiling, examining real estate developers working on iconic projects, architecture studios, and quality home furnishings brands. Photo ethnography and visual anthropology captured aesthetic territory. Vision boards became critical tools for sharing aesthetic directions with the partners.

The team explored typography extensively, recognizing typeface selection would carry significant meaning. Partners had strong opinions about details that might seem minor to outsiders — like the exact shape and positioning of letters. The team explored numerous options before landing on customized Mabry by Family Type Foundry to set the appropriate tone. They tested physical materials, exploring different paper stocks and printing finishes, to reinforce the brand's premium feel.

Analysis + Insights: Three key insights shaped design direction.

- Commitment far beyond typical business cycles, a byproduct of decades-long projects, identified a theme central to the brand narrative.
- Dedication to creating iconic architecture and working with renowned architects revealed meticulous expectations for craft and consistent attention to quality and detail.
- Respect for family extended to how they treated clients and partners — building relationships meant to last generations.

Design + Implementation: The work moved to strategy, naming, and the development of a complete visual identity system that encompassed everything from business cards and stationery to

website design, photography, and social media content.
Implementation occurred in phases. Opal created process documents that traced the brand-development story and provided transparency into decision-making to help partners understand how each choice connected to research insights.
The name "The Max Collaborative" honored the Ratner family patriarch while emphasizing partnership. Design decisions like color selection, typography favoring a modest sans serif over ostentatious display faces, and high-quality yet restrained printing methods were made to reflect the warmth, insight, integrity, and confidence identified as strengths during research.

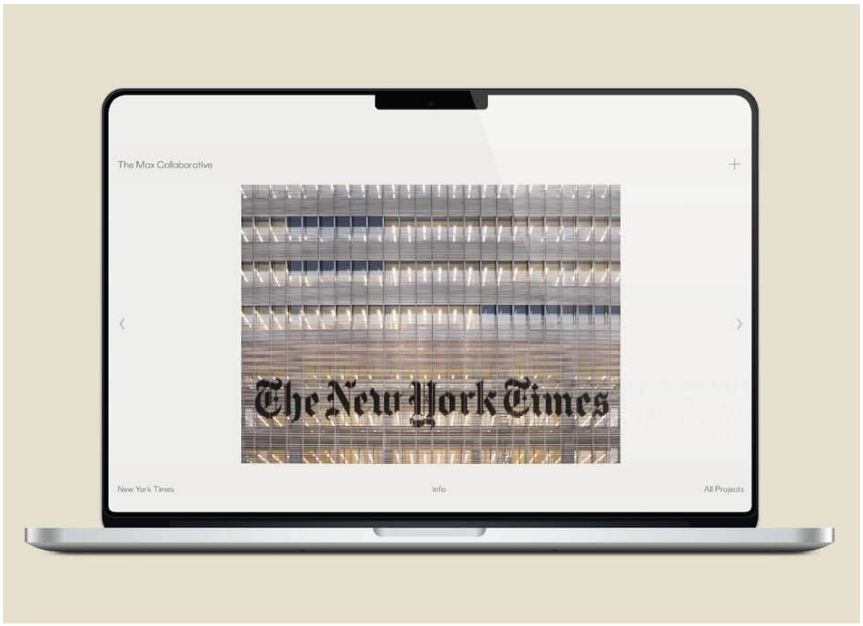
Results

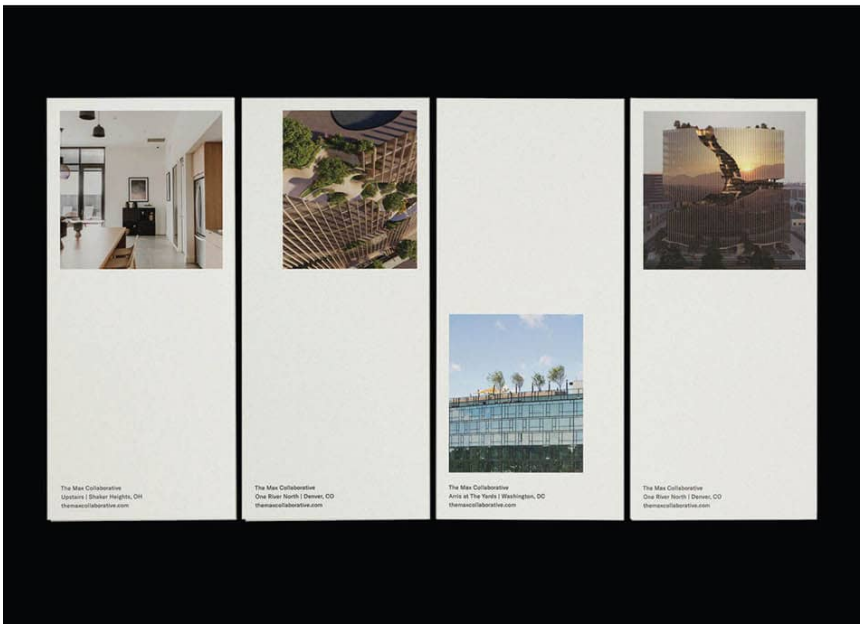
The Max Collaborative launched with brand collateral that bridged its storied past with the promise of its future.

Years later, they measure the initial branding project's success in community feedback and the volume of new work undertaken. The partnership between real estate entity and design firm continues to build on the foundation of "friendly professionalism" that Max himself inspired, with Opal supporting ongoing alignments and brand updates as necessary, and also working for its family office and investment group, RMS. Their collaboration confirmed that investing the time to understand the people and legacy behind an organization creates the foundation for sustained, meaningful work.

In Practice

"*Interviews with founders revealed inspiring firsthand stories that shaped our understanding. We sought visual inspiration broadly — furniture, architecture, anything that communicated the right tone. Historic artifacts provided authentic direction when available. Typography deserved more time than expected — surveying the landscape widely helped us find what felt both appropriate and timeless for this specific client.*"





From the website to individual property brochures, the identity system balanced consistency with flexibility, allowing each project's unique character to emerge within a unified brand framework.

SOULMATES
GRAPHIC
NOVEL

AUDIENCE:

Young adult readers (ages 12–18)

CREDITS:

David Wilson

CLIENT:

Roaring Brook, MacMillan Publishers

RESEARCH TACTICS INCLUDE:

Literature Review
Contextual Inquiry
Observational Research
Visual Anthropology
Mood Boards
Sketching

How do you create an authentic graphic novel about pressure, identity, and first love that resonates with young adult readers and navigate the complex realities of the publishing market? You design it first.

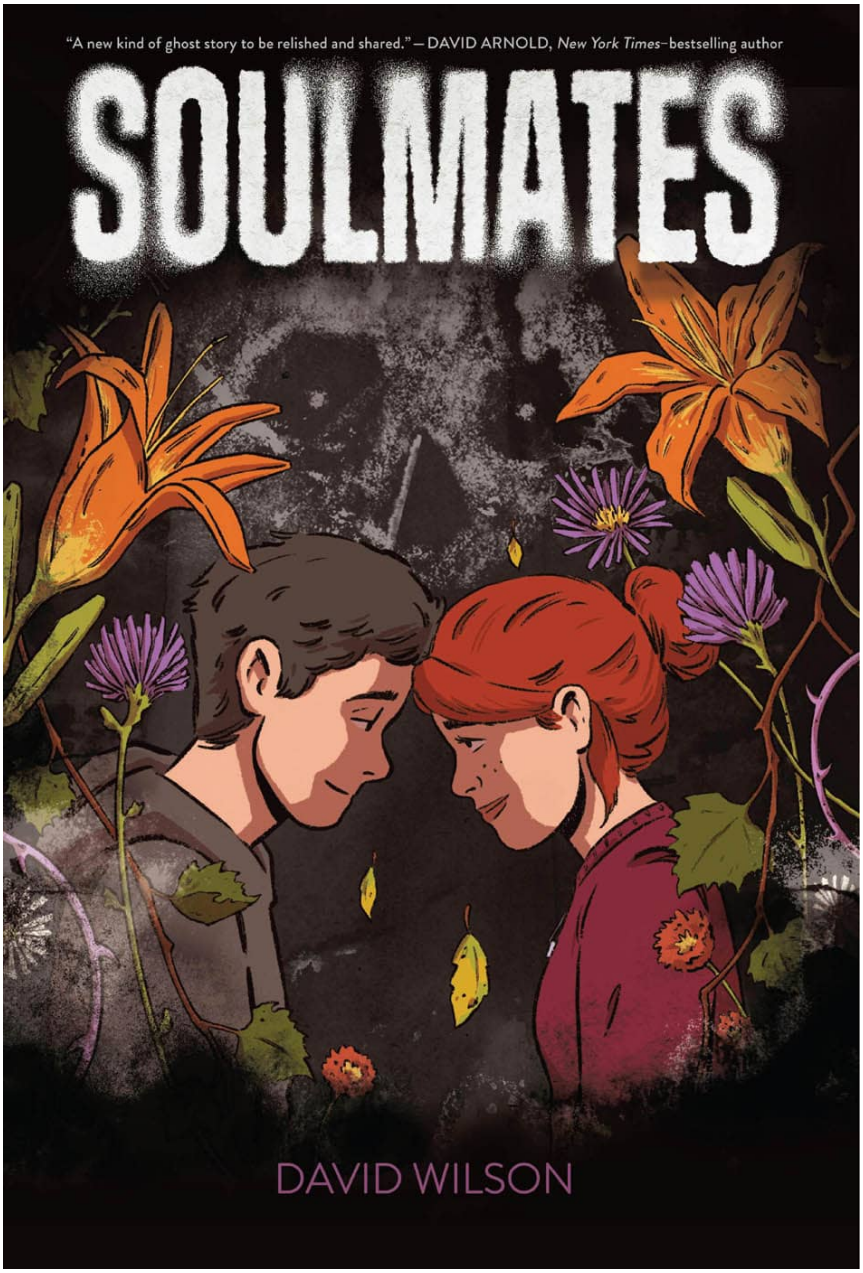
Goals

David Wilson began the project that would become *Soulmates* with a personal question: what would he tell his teenage self — someone who didn't know what he wanted from his future, who felt pressure to meet societal standards he didn't believe in? The answer became a 320-page young adult (YA) graphic novel exploring stressors, expectations, self-belief, and embracing the unknown.

Wilson had two goals for the project. First, he wanted to find a home for the speculative graphic novel, which proved daunting in a market that rarely featured such work. Second, Wilson sought more than publication. He wanted an editorial partner who could share his vision and push his creativity and growth as an author-illustrator as much as they would shepherd development of the book.

Research + Deliverables

Research Phase: *Soulmates* deals heavily with the afterlife, requiring Wilson to develop visual and narrative language unique to the story but also universally relatable. Through extensive literature review, he examined religious beliefs, historic texts, mythology, and theoretical frameworks about death, identifying overlapping themes and iconography. Rather than adopting a single perspective, he mixed and merged elements, creating an afterlife representation that drew from multiple traditions without being bound to any particular doctrine.



Soulmates, a 320-page YA graphic novel by David Wilson, tells the story of first love and identity through a decade-long design and research process that shaped both the narrative and visual approach.



Wilson's narrative centers on Kit, whose ideal small-town life falls apart when his childhood friend returns and mysterious visions force him to confront his past.

▶ Description

Wilson's position as assistant professor provided ongoing interaction with young adults just outside his target demographic of twelve- to eighteen-year-olds. Empathy developed in the college classroom provided insight into the perspectives, habits, and lingo of young adults. His initial concept — addressing pressure and fear of an

unknown future — was validated through organic, student-initiated conversations about their anxieties around parental pressure, school demands, work expectations, and uncertainty about job markets. This informal observational research shaped themes and dialogue throughout *Soulmates*.

Analysis + Insights: As an illustrator, Wilson understood the need to adapt style to audience. His work for adult readers often employed detailed rendering, harder-edged line work, and complex styling. For middle-grade graphic novels, his characters have favored exaggeration and reduced detail. On *Soulmates*, Wilson sought middle ground — comic-style imagery that would engage younger readers while bridging the visual gap between traditional age-group offerings. His solution involved mixing dark horror with contemporary teen life, contrasting simple illustration against abstraction.

Design + Implementation: The journey from initial concept to published book spanned nearly a decade and multiple radical reinventions. Wilson began work on an adult fantasy novel, attempting multiple formats and receiving consistent rejections. After publishing his first graphic novel, *Play Like a Girl*, with wife and collaborator Misty Wilson, he retooled the *Soulmates* concept for younger audiences, spending two years with his agent reworking the story to balance creative vision with market realities. Once they secured a publisher, development took an additional two to three years from contract to release.

The final graphic novel employed distinctive visual approaches to differentiate between real-world and afterlife sequences. Real-world scenes used heavier, richer line work, with color rendered digitally. Afterlife sequences incorporated watercolor scans and textured drawings in grayscale. Wilson also employed dual point-of-view narration through main characters Kit and Emma — a less common approach in graphic novels.

Results

Soulmates launched to positive reception, with strong feedback from advance readers and favorable online reviews. For Wilson, success manifested in achieving publication with a major imprint and finding the editorial partnership he sought. The decade-long journey taught him lessons about resilience, balancing vision with market realities, and creative flexibility.

The project demonstrates that passion-driven creative work often requires patience measured in years, willingness to radically and iteratively revise based on honest feedback, and commitment to finding the right collaborators. Wilson's journey wasn't evidence of struggle — it was evidence of dedication to creating work worth making.

For emerging creators, *Soulmates* offers lessons about research as continuous practice, understanding readers through direct engagement, and the importance of critique and revision in developing work that resonates. Wilson didn't get it right the first time, or the second, or the third. He got it right when the story found its authentic form, and *Soulmates* could finally reach the intended audience.

In Practice

"Research through the passive collection of everything — visuals, ideas, sounds, feelings, information — and document that collection through photos, drawings, scrapbooks, and writing. Search out and investigate the intricacies of what makes the world special, and save those elements to bring into your work later."



Different visual treatments distinguish the real world from the afterlife. Bold line work grounds reality, while watercolor washes create a dreamlike quality for spirit-world sequences.

▶ Description



Wilson's process included sketching at varied levels of fidelity to refine ideas and shooting reference photography around his home to ensure authenticity in details and atmosphere.

▶ Description

GLOSSARY OF **TERMS**

A/B Testing
Evaluation of two different design solutions, each tested with a unique group of users to measure feedback and responses.

Analytics
A form of quantitative analysis that uses concrete metrics to track user behavior online. Modern analytics platforms exist for websites, mobile applications, email campaigns, and social media.

Applied Research
Research focused on developing new products, experiences, or services, serving commercial and/or social needs.

Basic Research
Research conducted to gain new knowledge within a specific area, or undertaken to satisfy the curiosity or personal interest of the researcher.

Card Sorting
Collecting feedback about information architecture by asking users to organize content cards in hierarchies that make the most sense to them.

Color Psychology
The study of the effect colors have on human behavior.

Communication Audit

A comprehensive review of an organization's marketing materials and assessment of the channels they use to communicate with clients, customers, or constituents.

Competitor Analysis
The process of evaluating the strengths and weaknesses of an organization's competitors.

Competitor Profiling
The establishment of personas for corporations, which helps to identify motivations, goals, and possibly the actions of an organization's competitors.

Contextual Inquiry
Conducting an unstructured interview in a location or context related to how a person will use a design piece.

Creative Brief
A concise presentation of research findings and the resulting strategy that the creative team will use to design deliverables. The creative brief should be informed by the research summary report.

Demographics
Collections of statistical data that describe a group of people. Common demographic variables include race, age, gender, and income.

Ethnographic Research
A research technique used by anthropologists to understand the link between human behavior and culture.

Experience Model

The visualization of an activity or sequence of events, documented through the perspective of a participant. Also called journey maps or experience maps, these tools help designers understand user interactions over time.

Eye Tracking
Study of the movement, pattern, and duration of the human gaze.

Focus Groups
A social science tool in which organized discussions, led by a moderator, are held in order to collect market research.

Formative Research
Research conducted at the beginning of a project to help define the problem to be solved.

Graphic Organizers
Visual tools that help designers connect concepts and see the relationships between information sets.

Human-Centered Design
Creating artifacts and experiences for the purpose of satisfying the needs of any individual, regardless of ability, age, education, or cultural background.

Information Literacy
A learning strategy that emphasizes the ability to recognize when information is needed, and to hone the skills to find, evaluate, analyze, and effectively use that information.

Iterative Design
A design process that uses a series of prototyping, testing, and refining cycles to reach a solution.

Literature Review
A comprehensive investigation of all documents, publications, articles, and books available within a specific area of study.

Logic Model
A visualization of a research plan, plotting research methods in sequence and indicating predicted outcomes, time allotments, and necessary resources.

Marketing Research
A form of sociology that focuses on the understanding of human behavior as it applies to a market-based economy, often specific to consumer preferences.

Market Segment
A subgroup or classification of a larger market; market segments may be delineated by any number of qualitative or quantitative criteria.

Media Scanning
A process of scrutinizing a competitor's publicly available corporate communications (such as annual reports and press releases), ad placement, messaging, and discernible brand presence, often across multiple media channels.

Mood Boards
Rapid visualization tools that aggregate imagery from numerous sources, helping the design team establish and convey an aesthetic tone.

Observational Research
The systematic process of viewing and recording human behavior and cultural phenomena without questioning, communicating, or

interacting with the group being studied.

Paper Prototyping
Testing digital and interactive experiences with an if/then progression of paper sketches to determine user preference before programming or development occurs.

Personas
Fabricated models based on research of end users that are created to identify motivations, expectations, and goals.

Photo Ethnography
A field exercise in which subjects are asked to record their daily experiences with photography or video. Individual cases can be combined in order to develop a broader understanding of a community under study.

Primary Research
Research conducted specifically for an individual problem or project.

Proto-Personas
Quick, assumption-based character models meant to be validated through subsequent research. They are less rigorous than research-based personas but useful for starting user-centered conversations early in a project.

Psychographics
A quantitative tactic used to measure the subjective beliefs of the group being studied. Common psychographic variables might include religious beliefs, music tastes, and personality traits.

Qualitative Research

A research approach that measures subjective data such as words, images, and opinions.

Quantitative Research
A research approach that measures objective data such as variables, quantities, and measurements, and analyzes the relationships between collected information sets.

Questionnaires
A tactic for collecting quantitative information by asking participants a set of questions in specific order. Participants answer by filling out a piece of paper or online; form questions are not administered orally (see survey).

Research Plan
An outline of all investigative measures needed to complete a project.

ResearchOps
(Research Operations) The systems, tools, and processes that make research scalable and sustainable across organizations, including participant recruitment, research repositories, and ethical compliance.

Research Summary Report
A presentation of all investigative findings and analysis. The research summary report informs the creative brief.

ROI (Return on Investment)
The measure of a performance by comparing the cost of an investment to the results that it produced.

Secondary Research

Reviewing a collection of data or findings that have previously been published by an outside party, for an alternative function.

Service Design
A systems-level approach examining how organizations deliver value across multiple touchpoints and over time, spanning digital interfaces, physical environments, and human interactions.

Summative Research
Used to frame and decipher the outcome of an investigative process. It confirms that the original hypothesis is correct or illustrates that it is flawed.

Surveys
A tactic for collecting quantitative information by asking participants a set of questions in specific order. When a researcher administers the questions it is called a survey or structured interview.

Target Audience/Market
The group or segment to which a communication is being directed.

Triangulation
Using three or more different research techniques to find areas of overlap. Common results, called convergence, are considered to be the most reliable.

Unstructured Interview
An information gathering tactic where the researcher allows the participant to guide the direction of the conversation.

User-Centered Design
Creating artifacts and experiences for the purpose of satisfying the needs of the specific person(s) for whom they are intended.

User Testing
A broad range of techniques designed to measure a product's ability to satisfy the needs of the end user, such as accessibility, functionality, and ease of use, while also meeting project requirements, such as budget, size, and technical requirements.

Visual Anthropology
A field research tactic that uses visual media to aid interpretations of cultural behavior. Visual anthropology differs from photo ethnography by placing the camera in the trained hands of the researcher, rather than in the untrained hands of a subject.

Visual Exploration
A method of primary research most commonly used by designers for solving problems of form and communication (studies might include variations of color, imagery, typography, and structure).

Visualization
A rapid prototyping tool used to make concepts understood.

Wireframe
Low-fidelity visual representations of page structure and content hierarchy, typically without detailed design elements. Used to test navigation, layout, and functionality before investing in visual design.

BIBLIOGRAPHY

Aaker, David A. *Building Strong Brands*. New York: Free Press, 1996.

"AEIOU Framework." EthnoHub, Qualitative Research Tools in the Cloud. https://tinyurl.com/mvuncdse.

Bennett, Audrey. *Design Studies: Theory and Research in Graphic Design*. New York, NY: Princeton Architectural Press, 2006.

Candi, Marina, Gerda Gemser, and Jan Van Den Ende. "Design Effectiveness Industry Report." Rotterdam: Rotterdam School of Management, 2010.

Colin, Kim. *Extra Spatial*. San Francisco: Chronicle Books, 2003.

Conifer Research. "How to Find Buried Treasure Using Experience Maps." Chicago: Conifer Research, 2002.

Cooper, Alan. *The Inmates Are Running the Asylum: Why High Tech Products Drive Us Crazy and How to Restore the Sanity*. Indianapolis, IN: Sams Publishing, 1999.

Cooper-Wright, Matt. "Design Research from Interview to Insight: Part One, Summarising the Interview." Medium. August 14, 2015. https://tinyurl.com/mrybv3e5.

Cooper-Wright, Matt. "From Interview to Insight: Part Two, Synthesising Insight." Medium. September 12, 2015. https://tinyurl.com/mp4skm55.

Cranz, Galen. *Ethnography for Designers*. New York: Routledge, 2014.

Cross, Nigel. "Design Research: A Disciplined Conversation." *Design Issues* 15, no. 2 (1999): 5–10.

Design Council. "Value of Design Factfinder." Report. London: UK Design Council, 2007. https://tinyurl.com/vs4u5tn6.

Design Council. "Design Index: The Impact of Design on Stock Market Performance, Report to December 2004." Report. London: UK Design Council, 2005. https://tinyurl.com/mvx53tsy.

Design Council. "A Study of the Design Process. Eleven Lessons: Managing Design in Eleven Global Brands." Report. London: UK Design Council, 2007. https://tinyurl.com/4d4vnzjc.

Dreyfuss, Henry. *Designing for People*. New York: Allworth Press, 2003. First published 1955 by Simon and Schuster.

Florida, Richard. *The Rise of the Creative Class*. New York: Basic Books, 2002.

Freach, Jon. "What Designers Can Learn from a Pioneering Anthropologist." *Atlantic*. July 1, 2011.
https://tinyurl.com/3cxzp2bt.

Hall, Erika. *Just Enough Research*. New York: A Book Apart, 2013.

Hanington, Bruce, and Bella Martin. *Universal Methods of Design: 100 Ways to Research Complex Problems, Develop Innovative Ideas, and Design Effective Solutions*. Beverly, MA: Rockport Publishers, 2012.

Heskett, John. *Toothpicks and Logos: Design in Everyday Life*. New York: Oxford University Press, 2002.

Holston, David. *The Strategic Designer: Tools and Techniques for Managing the Design Process*. Cincinnati, OH: HOW Books, 2011.

Kelley, Tom, and Jonathan Littman. *The Art of Innovation*. London: HarperCollinsBusiness, 2001.

Klein, Laura. "How A/B Testing and Analytics Can Make You a Better Designer." Smashing UX Design. September 20, 2011. https://tinyurl.com/yc8mn3z2.

Knapp, Jake, John Zeratsky, and Braden Kowitz. *Sprint: How to Solve Big Problems and Test New Ideas in Just Five Days*. New York: Simon & Schuster, 2016.

Kretzschmar, Anders. "The Economic Effects of Design." Report. Denmark: National Agency for Enterprise, 2003.

Kumar, Vijay. *101 Design Methods: A Structured Approach for Driving Innovation in Your Organization*. Hoboken, NJ: Wiley, 2012.

Kuniavsky, Mike. *Observing the User Experience: A Practitioner's Guide to User Research*. 2nd ed. San Francisco: Morgan Kaufmann, 2012.

Laurel, Brenda. *Design Research: Methods and Perspectives*. Cambridge, MA: MIT Press, 2003.

Lidwell, William, Kritina Holden, and Jill Butler. *Universal Principles of Design*. Gloucester, MA: Rockport Publishers, 2003.

Lockwood, Thomas. "Design Value: A Framework for Measurement." *Design Management Review* 18, no. 4 (2007): 90–97.

Muratovski, Gjoko. *Research for Designers: A Guide to Methods and Practice*. 3rd ed. London: SAGE Publications, 2024.

Naranjo-Bock, Catalina. "Creativity-Based Research: The Process of Co-Designing with Users." *UX Magazine*. April 24, 2012. https://tinyurl.com/87fwxh92.

Nielsen, Jakob. "When to Use Which User Experience Research Methods." Nielsen Norman Group. January 7, 2003. https://tinyurl.com/2cmvm7k9.

Nippert-Eng, Christena. *Watching Closely*: *A Guide to Ethnographic Observation*. New York: Oxford University Press, 2015.

Noble, Ian. *Visual Research: An Introduction to Research Methodologies in Graphic Design*. New York: AVA Publishing, 2011.

Norman, Donald A. *The Design of Everyday Things*. Revised and expanded ed. New York: Basic Books, 2013.

Nova, Nicholas, and Lysianne Léchot-Hirt. *Beyond Design Ethnography: How Designers Practice Ethnographic Research*. Berlin: SHS, 2014.

Peters, Thomas J. *The Circle of Innovation*. New York: Vintage Books, 1999.

Petersen, Soren. "Design Innovation by Design Research." *Huffington Post*. November 26, 2015. https://tinyurl.com/5fud6jm5.

Portigal, Steve. *Interviewing Users: How to Uncover Compelling Insights*. 2nd ed. Brooklyn, NY: Rosenfeld Media, 2023.

Purdy, Kevin. "What the Hell Is Project Management, Anyway?" *Fast Company*. March 7, 2012. https://tinyurl.com/bddbn49z.

Rae, Jeneanne. "Good Design Drives Shareholder Value." Design Management Institute. May 2015. https://tinyurl.com/mratk9dv.

Rodgers, Paul, and Joyce Yee. *The Routledge Companion to Design Research*. New York: Routledge, 2014.

Sauro, Jeff, and James R. Lewis. *Quantifying the User Experience: Practical Statistics for User Research*. 2nd ed. Cambridge, MA: Morgan Kaufmann, 2016.

Shea, Andrew, ed. *Designing for Social Change: Strategies for Community-Centered Design*. New York: Princeton Architectural Press, 2012.

Sheppard, Benedict, Hugo Sarrazin, Garen Kouyoumjian, and Fabricio Dore. "The Business Value of Design." McKinsey & Company. October 25, 2018. https://tinyurl.com/mr44cu43.

Spencer, Donna. *Card Sorting: Designing Usable Categories*. Brooklyn, NY: Rosenfeld Media, 2009.

Spradley, J. *Participant Observation*. New York: Holt, Rinehart & Winston, 1980.

Stone, Terry, and Adams Morioka. *Color Design Workbook: A Real-World Guide to Using Color in Graphic Design*. Gloucester, MA: Rockport Publishers, 2006.

Stone, Terry Lee. *Managing the Design Process: Implementing Design: An Essential Manual for the Working Designer*. Beverly, MA: Rockport Publishers, 2010.

Tormey, David. "A Survey of Design and Innovation Amongst Ireland's SMEs." Report. Ireland: Centre for Design Innovation, 2007.

Visocky O'Grady, Jennifer, and Kenneth Visocky O'Grady. *Design Currency: Understand, Define, and Promote the Value of Your Design Work*. San Francisco: Pearson Education, Peachpit Publishers, 2012.

Visocky O'Grady, Jennifer, and Kenneth Visocky O'Grady. *The Information Design Handbook*. Cincinnati, OH: HOW Books, 2008.

Walter, Aarron. "The Expanding Role of User Experience Design." *UX Magazine*. May 25, 2011. https://tinyurl.com/5he4bzt9.

Walters, Helen. "The Value of Design." *Bloomberg Businessweek*. February 1, 2010. https://tinyurl.com/2cv5jj23.

Yablonski, Jon. *Laws of UX: Using Psychology to Design Better Products and Services*. Sebastopol, CA: O'Reilly Media, 2020.

Young, Indi, and Jeffrey Veen. *Mental Models: Aligning Design Strategy with Human Behavior*. Brooklyn, NY: Rosenfeld Media, 2008.

Additional Resources

AIGA | The Professional Association for Design — aiga.org

Communication Arts — commarts.com

Core77 — core77.com

Design Council — designcouncil.org.uk

Design for America — designforamerica.org

The Design Management Institute — dmi.org

The Design Research Society — designresearchsociety.org

IDSA | Industrial Designers Society of America — idsa.org

Interaction Design Foundation — interaction-design.org

NN/G — nngroup.com

Print — printmag.com

RGD | The Association of Registered Graphic Designers — rgd.ca

Society for Experiential Graphic Design — segd.org

UX Collective — medium.com/ux-collective

UXPA International | User Experience Professionals Association — uxpa.org

CREDITS

Note: All charts, graphs, diagrams, and illustrations were created by the authors unless otherwise noted below:

Chapter One

CURE International illustrations, environmental graphics, and way-finding courtesy of KSUVCD: Professor: Ken Visocky O'Grady. Students: Steve Brackenrich, Serena Fantozzi, Jessie Rivera, Mattie Welteroth (p14)

"The Humanity of Research" expert voice text and image contributed by Mike Bond, Bond & Coyne (p16–p17)

The work of László Moholy-Nagy courtesy of his daughter, Hattula Moholy-Nagy (p18–p19)

Joe + Josephine diagram courtesy of Henry Dreyfuss Associates (p20)

Portrait of Arthur C. Nielsen Sr. courtesy of ACNeilsen (p21)

Xerox 8010 Star Computer image and icons courtesy of Xerox Historical Archives (p23, p24)

Design strategy image courtesy of Humantific, SenseMaking for ChangeMaking (p27)

Equal.is website image courtesy of Rule29 (p27)

"Free Center: Community Partnerships + Creative Infrastructure" expert voice text and image contributed by Rich Hollant, CO:LAB (p28–p31)

Chapter Two

"How AI Is Transforming Competitive + Secondary Research" expert voice text and images contributed by Justin Ahrens, Rule29 Creative Agency (p52–p53)

Observational research images, iStock Photo (p61)

Photo ethnography images courtesy of CSU Design: Professor: Sarah Rutherford, Human-Centered Graphic Design class work by Reese Shebel (p63)

Self ethnography images courtesy Design Impact (p65)

Visual anthropology images, iStock Photo (p69)

Paper prototyping image courtesy of Hyland Software, Alexander Binder and Michael Ullinger (p91)

Persona images, iStock Photo (p93)

"Designing the Future of Work" expert voice text and image contributed by Winston Wang, Oracle (p94–p97)

Sketches from *Take and Make Art* courtesy of Glitschka Studios, Illustrator, Von Glitschka (p99)

Cleveland Museum of Art mood board and environmental branding images courtesy of Agnes Studio (p102–p103)

Wireframes and resulting web design images courtesy of Andrew Twigg (p105–p106)

Chapter Three

Journey map image detail courtesy of Veterans Experience Office, U.S Department of Veterans Affairs (p131)

"Journey Maps: From Surface Insights to Systemic Change" expert voice text and image contributed by Aradhana Goel and Sara Frisk, Rouse Design Studio (p137–p139)

Chapter Four

WonderWhat case study images courtesy of Bond & Coyne (p143–p149)

Compass Youth Collaborative case study images courtesy of CO:LAB. Founder: Richard Hollant. Senior Designer: Lorena Iturrino (p150–p157)

Localized Branding case study images courtesy of Coinbase. Design + Illustration: Terran Washington, Dominic Flask (p158–p163)

Osgoode PD case study images courtesy of Context Creative (p164–p169)

MSP Wayfinding System case study images courtesy of Entro and Alliiance Architects. Photography: John Magnoski, Eric Mueller (p170–p177)

"Integrating Co-Creation Methods in Your Design Research Work" expert voice text and images contributed by Penina Acayo Laker, Sam Fox School of Design + Visual Arts at Washington University (p178–p181)

Canandaigua National Bank case study images courtesy of Hale Design. CEO and Chief Creative Officer: Su Mathews Hale. Lead Strategist: Danielle Tracy Goyal. Designers: Nijel Taylor, Zöe Murray, Kyle Davis, Kevin Kan. Web Partner: Kingdom Branding. Advertising Agency: Flynn (p182–p187)

Plural Rebrand case study images courtesy of New Kind. Matthew Muñoz, Partner; Jonathan Opp, Partner; Eric Cox, Design Director; Kris Bowen, VP Relationships. Client: Yemi Adewunmi, Cofounder; Molly Brooksbank, VP CX; Carrie Fisher, VP Marketing (p188–p193)

The Max Collaborative case study images courtesy of Opal. Christine Wisnieski, Lauren Woltman, Hilary Bovay, Vicki Urbas. Photography: TRG Multimedia, Hilary Bovay, Mickkail Cain, Forest City Enterprise Archive. Printing: Oliver Printing, Shinola. Typefaces: Colophon & Grilli Type Foundry. Developers: Forest City, The Max Collaborative (p194–p200)

Soulmates case study images courtesy of David Wilson (p200–p205)

FEATURED **PRACTITIONERS**

Agnes Studio
Cleveland, OH
agnes-studio.com

Alliiance
Minneapolis, MN
alliiance.com

Bond & Coyne
London, England
bondandcoyne.co.uk

CO:LAB
Hartford, CT
colabinc.com

Coinbase
Wilmington, DE
coinbase.com

Context Creative
Toronto, ON
contextcreative.com

Design Impact
Cincinnati, OH
d-impact.org

Entro
Toronto, ON
entro.com

Glitschka Studios
Salem, OR
glitschkastudios.com

Hale Design
Rochester, NY
hellohaledesign.com

Humantific
SenseMaking for ChangeMaking
New York, NY
humantific.com

Hyland Software
Westlake, OH
onbase.com

New Kind
Raleigh, NC
newkind.com

Opal
Cleveland, OH
officeofopal.com

Rouse Design Studio
San Francisco, CA
rouse-studio.com

Rule29
Phoenix, AZ
rule29.com

Sarah Rutherford
Associate Professor Department of Art + Design at Cleveland State University
Cleveland, OH
rutherfordse.com

Andrew Twigg
Associate Teaching Professor, School of Design at Carnegie Mellon University
Pittsburgh, PA
andrewtwigg.com

Veterans Experience Office
Washington, D.C.
va.gov

David Wilson
Cleveland, OH.
workdavidwork.com

Expert Voices

Justin Ahrens
President + Chief Creative Officer, Rule 29 Creative Agency
Phoenix, AZ
rule29.com

Mike Bond
Founding Partner, Bond & Coyne, *Founder*, WonderWhat Inc., London, England
bondandcoyne.co.uk
wonderwhat.co.uk

Sara Frisk
Founder + Design Lead, Rouse Design Studio
San Francisco, CA
www.rouse-studio.com

Aradhana Goel
Founder + Strategy Lead, Rouse Design Studio
San Francisco, CA
www.rouse-studio.com

Rich Hollant
Founder, CO:LAB + Free Center
Hartford, CT
colabinc.com

Penina Acayo Laker
Associate Professor, Sam Fox School of Design + Visual Arts at Washington University
St. Louis, MO
samfoxschool.washu.edu

Winston Wang
VP of UX Design, Oracle
San Francisco, CA
oracle.com

INDEX

A

A/B testing, 80, 81
accessibility specialists, 26
ACNielsen company, 21
Ahrens, Justin, 52–53
AI
  in competitive analysis and secondary research, 52–53
  hyper-automated, 94–97
  for literature reviews, 47
AIGA, 140
airport wayfinding, project spotlight on, 170–77
Alto computer, 22, 24
American Anthropological Association, 56
analysis frameworks, 127–31
analytics, 82–83
anatomical drawings, 20, 21
anthropology, visual, 62, 68–69
Apple Lisa, 24
applied research, 43
assumptions exercise, 119, 121
auto ethnography, 64–65

B

banking, project spotlight on, 182–87
basic research, 43
Bauhaus, 18
Berkowitz, Bob, 115
Big6, The, 115, 116
Bond, Mike, 16–17
Bond & Coyne, 143, 145, 148
budgets, 32, 88, 99, 111, 115

C

Canandaigua National Bank, 182–87
card sorting, 84–85

career opportunities, project spotlight on, 143–49
careers, in design research, 25–26
Centre for Design Innovation, 35
change, 25, 53, 58, 80, 130, 137, 178, 188
Civic Eagle, 188, 190, 191
co-creation, 178–81
Coinbase Localized Branding, 158–63
CO:LAB, 28, 30, 153, 154, 156, 157
Color Association of the United States, 100
Color Marketing Group, 100
color psychology, 100, 101
communication audits, 46, 48, 49
COMPASS Peacebuilders, 151, 152, 153–54, 156, 157
COMPASS Youth Collaborative, 150–57
competitive analysis, AI used in, 52–53
competitive intelligence, 51
competitor profiling, 50–51
computers, 22–24
Context Creative, 164–69
contextual inquiry, 58–59
convergence, 44, 45, 107, 127
Cooper (firm), 92
creative briefs, 132, 134–36
cryptocurrency, project spotlight on, 158–63
cultural interpretations of color, 100, 101
cumulative documentation, 140
customer satisfaction, 13, 36, 75, 79

D

DDC (Danish Design Center), 35, 36
demographics, 72, 73
Descriptive Observation Matrix (Spradley), 128, 129
design. *See also* research-driven design
  co-creation and, 178–81
  human-centered, 15
  iterative, 79, 104, 111, 112
  managing process of, 109–10

person-first, 13–15
user-centered, 15
value created by, 32–36
Design Alert Businesses, 33
Design Council, 33, 113, 114, 140
Design Impact, 65
Design Index, 33
Designing for People (Dreyfuss), 21
Design Management Institute, 33, 140
Design Staircase, The, 35, 36
design strategists, 26
Design Value Index, 33
desktop icons, 24
Double Diamond Design Process, 113, 114
Dreyfuss, Henry, 21

E

Eisenberg, Mike, 115
emic perspective, 55, 62
empathy, framework for, 130, 131
Entro, 170–77
ethics, 15, 25, 26, 51, 56, 61
ethnographic research, 54–69, 107
etic perspective, 55, 68
event maps, 130, 131
experience designers, 25
experience maps, 58, 64
experience models, 130, 131
expert voices
Ahrens, Justin, 52–53
Bond, Mike, 16–17
Frisk, Sara, 137–39
Goel, Aradhana, 137–39
Hollant, Rich, 28, 30–31
Laker, Penina Acayo, 178–81
Wang, Winston, 94–97
eye tracking, 86–89

F

fixations, 86, 87, 88
focus groups, 42, 74–75
Forest City Realty Trust, 194
formative research methods, 41, 42
frameworks, analysis, 127–31
Free Center, 28–31
Frisk, Sara, 137–39

G

Glitschka, Von, 99
Goel, Aradhana, 137–39
graphic design. *See* design
graphic novel, project spotlight on, 200–205
graphic organizers, 104, 122
GUI (graphical user interface), 22, 24

H

Hale Design, 182–87
heat maps, 86, 89
Help Stop Hate, 138–39
Hollant, Rich, 28, 30–31, 153
human-centered design, 15
Humantific, 26, 27
Hyland Software, 91

I

icons, desktop, 24
inclusive design, 26
information literacy, 115, 116
International Council of Design, 140
interviews, unstructured, 66–67
IRB (Institutional Review Board), 56
iterative design, 79, 104, 111, 112

J

journey maps, 137–39

K

KWHL tables, 122–23

L

Laker, Penina Acayo, 178–81
linear design process, 109, 110
literature reviews, 46–51
localized branding, project spotlight on, 158–63
logic models, 124–25, 141

M

macro-ethnography, 55, 57
market analysis, 70, 71
marketing research, 21, 39–40, 70–77
market segments, 57, 72
Max Collaborative, The, 194–99
McKinsey Design Index (MDI), 34
micro-ethnography, 55, 57
Microsoft Windows, 24
Moholy-Nagy, László, 18, 19
mood boards, 102, 103
Motiv Strategies, 33
MSP Airport Wayfinding, 170–77
multivariate testing, 80

N

New Bauhaus, 18
New Kind, 188–93
New Vision, The (Moholy-Nagy), 18, 19
Nielsen, Arthur C., 21

O

observational research, 60–61
Opal, 194–99
Osgoode Professional Development, 164–69

P

Pantone, 100
paper prototyping, 90–91

PARC (Palo Alto Research Center), 22, 24
Perfect Couple, The, 21
personas, 92–93
person-first design, 13–15
photo ethnography, 62–63
Plural Rebrand, 188–92
primary research methods, 40, 41
professional development, project spotlight on, 164–69
project-oriented design process, 109
project spotlights, 142
  Canandaigua National Bank, 182–87
  Coinbase Localized Branding, 158–63
  COMPASS Youth Collaborative, 150–57
  The Max Collaborative, 194–99
  MSP Airport Wayfinding, 170–77
  Osgoode Professional Development, 164–69
  Plural Rebrand, 188–93
  Soulmates graphic novel, 200–205
  WonderWhat, 143–49
prototyping and testing, 111, 112
psychographics, 73

Q

qualitative research methods, 39, 40
quantitative research methods, 39–40
questionnaires, 76, 77

R

rebranding, project spotlight on, 188–93
research
  analysis of, 126–31
  applied, 43
  basic, 43
  humanity of, 16–17
  purpose and limits of, 12
research-driven design. *See also* design
  benefits of, 11, 13, 39
  careers in, 25–26
  elements of, 109–10
  historical perspectives on, 18–24
  tips for, 37

research findings, triangulating, 44, 45
research methods
choosing, 107, 119
formative, 41, 42
primary, 40, 41
qualitative, 39, 40
quantitative, 39–40
secondary, 40–41, 52–53
summative, 41–42
Research Operations (Research Ops), 25
research plans, 118–25, 141
research strategies
ethnographic research, 54–69
literature reviews, 46–51
marketing research, 70–77
tips for, 107
user experience, 78–93
visual exploration, 98–106
research summary reports, 132, 133
ROI (return on investment), 32, 33, 34

S

saccades, 86, 87, 88
scanpaths, 86, 87, 88, 89
secondary research
AI used in, 52–53
methods, 40–41
self ethnography, 64–65, 107
service designers, 25
ShareBase, 91
sketching, 104, 105, 106
software agent-powered automation, 94–97
Soulmates graphic novel, 200–205
Spradley, James P., 128, 129
structure, frameworks for, 128, 129
summative research methods, 41–42
Super3, The, 117
surveys, 76, 77

T

tactile exercises, 18, 19
Take and Make Art (Glitschka), 99
technographic data, 82
triangulation, 44–45, 56, 107, 127

U

unstructured interviews, 66–67
user-centered design, 15
user experience, 78–93
user researchers, 25
user testing, 19, 24, 41, 42, 44, 45, 79, 125, 168, 172

V

value, 32–36
"Value of Design Factfinder, The," 33, 34
VA Patient Experience Journey Map, 131
violence prevention, project spotlight on, 150–57
visual anthropology, 62, 68–69
visual exploration, 98–106
visual sense-making, 26

W

Wang, Winston, 94–97
web statistics, 82–83
Wilson, David, 200–205
wire frames, 104, 105, 106
WonderWhat, 143–49

X

Xerox, 22
Xerox 8010 Star Information System, 23, 24

Y

youth organization, project spotlight on, 150–57

ABOUT THE **AUTHORS**



This book is a collaborative effort, not possible without the shared experiences and candor of our contributors. We're inspired by their work and honored by their participation.

Jenn + Ken Visocky O'Grady are authors, designers, and educators whose work has been featured in numerous books and creative industry publications.

Jenn is a professor and associate dean at Cleveland State University, a public research university where for nearly three decades she has dedicated herself to providing access and opportunity to a diverse group of aspiring students and creatives. She has also served on the board of directors for AIGA, the professional association for design.

Ken is a professor in the School of Visual Communication Design at Kent State University, where for over a decade he served as coordinator of the graduate program. His coursework focuses on design thinking and research-driven design practices. He has served on the AIGA Design Educators Community (DEC) steering committee.

The couple have co-authored three internationally distributed books, *Design Currency*, *The Information Design Handbook*, and *A Designer's Research Manual*, that strive to make academic concepts approachable while celebrating the power, impact, and potential of good design. They also present workshops and lectures at creative industry events, and are committed to promoting the value of design to external audiences.

This book is dedicated to designers everywhere who are pushing the boundaries of the profession to ensure its relevance, prosperity, and longevity.

(And to Lulu. See? Homework never ends.)

Quarto.com

© 2006–2026 Quarto Publishing

Third edition published in 2026
Second edition published in 2017
First published in 2006 by Rockport Publishers, an imprint of The Quarto Group,
100 Cummings Center, Suite 265-D, Beverly, MA 01915, USA.
T (978) 282-9590 F (978) 283-2742

EEA Representation, WTS Tax d.o.o.,
Žanova ulica 3, 4000 Kranj, Slovenia.
www.wts-tax.si

All rights reserved. No part of this book may be reproduced in any form without written permission of the copyright owners. All images in this book have been reproduced with the knowledge and prior consent of the artists concerned, and no responsibility is accepted by producer, publisher, or printer for any infringement of copyright or otherwise, arising from the contents of this publication. Every effort has been made to ensure that credits accurately comply with the information supplied. We apologize for any inaccuracies that may have occurred and will resolve inaccurate or missing information in a subsequent reprinting of the book.

Rockport Publishers titles are also available at discount for retail, wholesale, promotional, and bulk purchase. For details, contact the Special Sales Manager by email at specialsales@quarto.com or by mail at The Quarto Group, Attn: Special Sales Manager, 100 Cummings Center, Suite 265-D, Beverly, MA 01915, USA.

10 9 8 7 6 5 4 3 2 1

ISBN: 978-0-7603-9944-6

Digital edition published in 2026
eISBN: 978-0-7603-9945-3

Originally found under the following Library of Congress Cataloging-in-Publication Data
Visocky O'Grady, Jennifer.

A designer's research manual : succeed in design by knowing your client and what they really need / Jennifer Visocky O'Grady and Kenneth Visocky O'Grady.

p. cm. — (Design field guides)

Includes bibliographical references and index.

ISBN 1-59253-257-8 (hardcover)

1. Commercial art — United states — Marketing. 2. Graphic arts — United States — Marketing. I. Visocky O'Grady, Kenneth. II.

Title. III. Series.
NC1001.6.V57 2006
741.6068'8 — dc222006 012597

CIP

Design: Jenn + Ken Visocky O'Grady