

Anti-Research

Rules Worth Breaking

With Jen Blatz



Congress OF THE United States,

begun and held at the City of New York, on
Wednesday the fourth of March, one thousand seven hundred and eighty nine.

THE Convention of members of the States, having at the time of their adopting that Constitution, expressed a desire, in order to secure its powers, that further declaratory and restrictive clauses should be added: And as extending the ground of public confidence in the Government, will best ensure the best observance of its powers,

RESOLVED by the Senate and House of Representatives of the United States of America, in Congress assembled, concerning, that the following Articles be proposed to the Legislatures of the several States as amendments to the Constitution of the United States, all, or any of which Articles, when ratified by the said Legislatures, to be valid to all intents and purposes, as part of the said Constitution: viz:

ARTICLES in addition to, and Amendment of the Constitution of the United States of America, proposed by Congress, to the several States.

The Bill of Rights

Article of the Constitution, there shall be one Representative for every thirty thousand, until the number shall amount to one hundred; after which the proportion shall be so regulated by Congress, that there shall not be less than one hundred Representatives, nor less than one Representative for every thirty thousand.



The 10 Commandments



GREMLINS

Research Laws

**Personas
are required**

**Research
slows things
down**

**Formal
research
report**

**Statistical
significance**

Anti-Research Handbook

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Jen Blatz

Principal UX Researcher at BECU
Boeing Employee Credit Union







Alan Cooper

1. Personas are Required





"I view my SUV as an extension of my personality. It sort of acts like a reflection of me in some ways."

James Warren

Male

52 years old

Employment: Aviation industry, parts and service

Warren is in **no rush to buy** a new vehicle and likes to **gather all the facts** before he buys. He keeps **extensive notes** on previous purchases and current vehicle features he is interested in. Warren wants to get a **different SUV than last time**, but wants to make the right decision that **fits within his lifestyle**. He wants a vehicle that is **sporty** like his **motorcycle**, but is **practical** and **comfortable** enough to drive every day.

Vehicle Features



haul items



recreational



fun



safety



comfort

Car stats

Car enthusiast



Urgency of purchase



Age of car purchased



Likes to negotiate



Research

Time to research for purchase



Break the Rule: Personas

- Scenarios
- Jobs to be Done
- Behaviors



Replace the Rule:
Personas

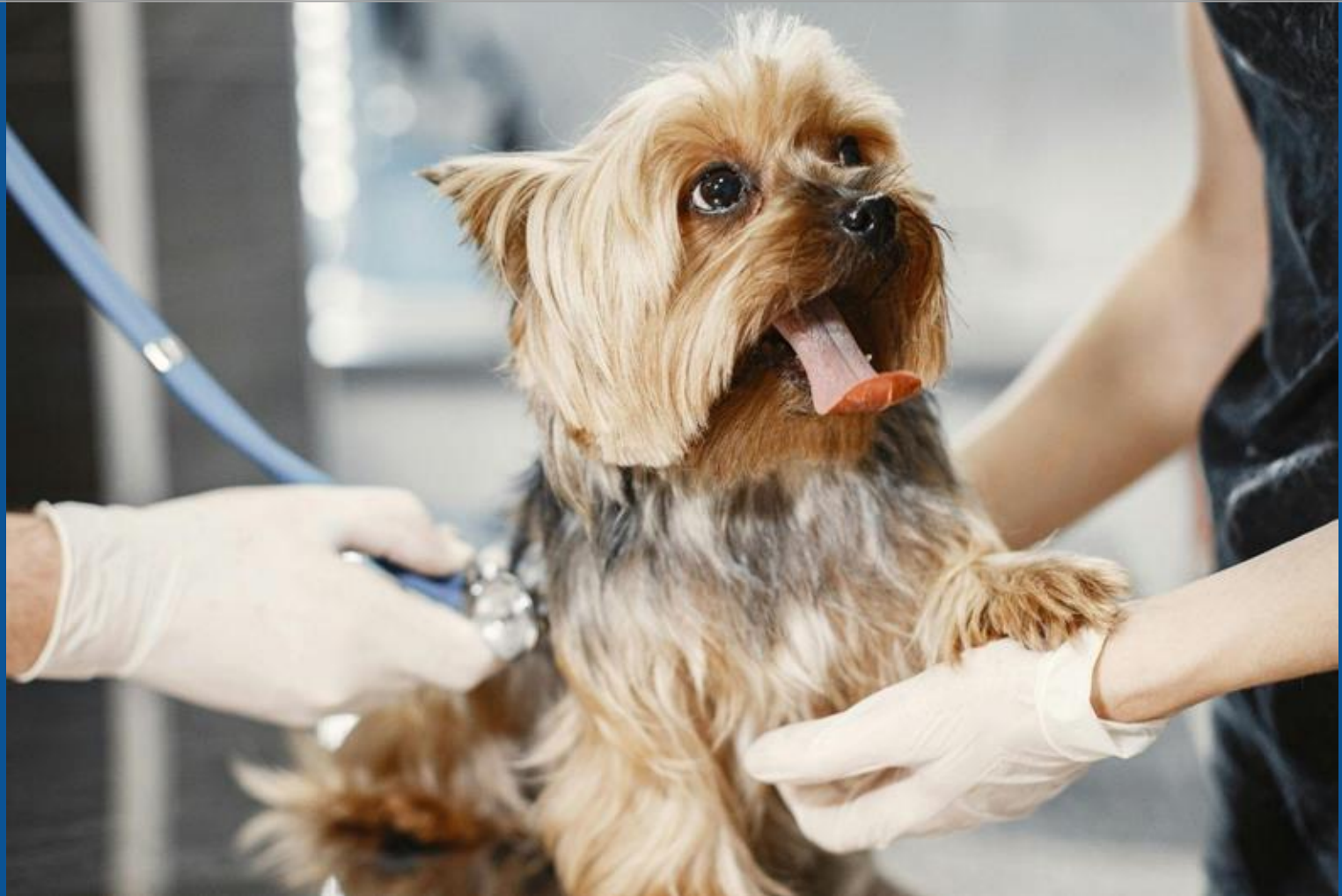


Final Thought:
Personas





Research
slows
things
down



Break the Rule: Slow Research

- Rigor match
- Micro studies
- Use AI



Final Thought:
Slow Research





I AM REALLY IMPORTANT AND I HAVE A LOT TO SAY

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I know this presentation is too boring to redistribute, but don't do it!

3. Formal Research Report



Executive Summary



Jonathan More than just the 'insurance' guy

 Stop originations

Summary

Jon is really eager to originate loans as an additional service for his Farmers insurance customers. He knows that the more products clients connect to him, the more "sticky" they will be. He worries that RM will "drop" him because he has not originated loans yet. "They pay me rent," he states, "I have this internal pressure that I need to produce in order to justify that cost." But Jon runs a small shop with only 1 staff member, so he has a lot to keep up with. This just does not lie at the top of his priority list.

Work breakdown

- 25% service and putting out fires
- 25% working on business marketing, housekeeping, billing
- 50% quoting and trying to bring in new biz

Motivations

- The community know Jon as the insurance [not originator] guy. So he wants to expand his reputation and his services
- Originating a mortgage is another way Jon can help and offer a service to the client. That creates "stickiness" which makes it harder for the client to leave. The trust is already there

Challenges

- **Time** - devoting time to running the business and acquiring new customers take priority
- **Low priority** - this will be at the bottom of the list, loan origination is like a bonus
- **Staff** - if Jon had more staff, he could pass the insurance on to them and focus more on loan origination



Feels the guilt

Jon knows that if he does not chase down and follow up on leads, that will hurt his business down the line. This makes him feel guilty.



Days since RTO

140



Apps started

6



Leads pulled

126



Why no apps?

Insurance first
Small staff
Acquiring customers

Ah-ha

"If business is slow, that is because I did not make enough calls. From a business standpoint, that slow business is due to me not putting in the work and calling those leads. I need to plant those seeds."

Don't Have Time for This Sh#t



Word Doc

Credit card set a reminder

Level of Detail

- Participants said the level of detail was what they expected, or a good amount of information.
- One participant liked the ability to set this through the phone.

Confusion and things unexpected

- Most participants found this easy to understand.
- One participant was concerned because they already do this reminder every time. They do not want to have to set a reminder every time.
- One person mentioned a concern associated with SMS fees. One member said, "If you have more than one phone, [provide an] option of a dropdown, kind of like the email."
- One participant thought this was redundant because they could just go into the phone app and check.

Design considerations

- Add language around potential SMS fees.
- Let people set this up on a recurring basis, not just once.
- Allow them to get notifications via mobile app.

Quotes*

- "I would love in that case to have a notification like this, just like whenever it's finalized." – GP k200x
- "Payment processing reminder. All right, I didn't expect this at all." – GP axm218
- "When the payment has successfully processed or the status has changed. Awesome!" – GP bdo601
- "Seems really straightforward." – M mastiffpa2000

* M = [redacted] member. GP = General population participants (from [redacted])

Comparison to current financial institution

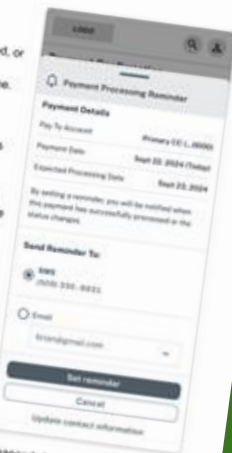
Note: half of the participants were [redacted] members.

Similar

"Classic credit card screen." – M RZ129

Better / Good

"It's a good amount of information to be able to make an informed decision about how much I wanna pay on my credit card bill." – M lesterive67
 "I'm not really used to everybody providing all this information without having to click the different screens."
 – GP axm218
 "[All the info] you can have in your back pocket to know when your payment was made." – GP Oasisfields



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"If business is slow, that is because I did not make enough calls. From a business standpoint, that slow business is due to me not putting in the work and calling those leads. I need to plant those seeds."

The screenshot displays a Slack interface for a workspace named "Fiktion GmbH". The main view is a channel titled "#soziale-medien" with the subtitle "Soziale Medien verfolgen und koordinieren". The channel contains several messages:

- Mamadou Achebe** (11:52 Uhr): Tolle Arbeit heute von allen!
- Lisa Laurenz** (11:55 Uhr): Erst mal ein großes Lob an @Nikki für ihre Hilfe gestern bei den vielen neuen Tweets. Alle sind ganz begeistert wegen der Mitteilung. (1 🙌, 1 🍷, 1 🍌, 1 😊)
- Nikki Kroll** (11:56 Uhr): Ach, das war mir doch ein Vergnügen! Toll, dass ihr so viel Engagement zeigt.
- Team Fiktion** (APP) (12:45 Uhr): Event starting in 15 minutes:
| **Team-Meeting zur Bestandsaufnahme** 🗓️
| Today from 1:00 PM to 1:30 PM
- Bilge Yanar** (12:58 Uhr): Kurze Info: Heute wird @Lisa zu unserer Team-Besprechung stoßen, um uns Neuigkeiten zum Start zu geben. Bitte meldet euch bei Fragen. Wir sprechen uns dann alle später ... ähm, in 2 Minuten 😊
- Stephan Zeis** (12:58 Uhr): Meeting-Notizen von unserer Besprechung mit @Lisa
Beitrag •
📄 **1/9 Meeting-Notizen**
Gerade eben zum letzten Mal bearbeitet

At the bottom of the channel, a notification states: "Zenith-Marketing befindet sich in diesem Channel". The message input field at the bottom contains the text "Nachricht an #soziale-medien".

The left sidebar shows the workspace navigation menu for "Fiktion GmbH":

- Threads
- Alle DMs
- Entwürfe
- Erwähnungen & Reaktionen
- Gespeicherte Elemente
- Mehr
- Favoriten
- # design-team
- # soziale-medien (selected)
- # team-finanzen
- Mia Greco
- Channels
 - # mitteilungen
 - # pr
 - Channel hinzufügen
- Direktnachrichten
 - Mamadou Achebe du
 - Bea Rösner, Christian Pahls...
 - Team-Mitglieder hinzufügen
- Apps
 - Google Calendar

Break the Rule: Reports

- Real-time sharing
- Stakeholders follow
- Earlier Decision



Final Thought:
**Formal Research
Report**





Statistical
significance





Companies Love: Statistical Significance



Why





Averages

Signals





How much
it matters

“Behind every data point is a human story.

Qualitative research ensures
we don't forget the customer
behind the chart.” — Raj Mitra



Final Thought:
**Statistical
Significance**



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