

Worksheet 1: Shared Understanding Baseline

Constraints

What are the business objectives?

Who are the key stakeholders?

Is there a timeline or key dates?

What do we know?

What previous research has been completed?

What major insights inspired this work?

Have we identified specific opportunities yet?

Capturing Customer Context

Worksheet 2: Visualizing Context



Sketch the key aspects you know - or hypothesize - about your customers.

- Who is your customer?
- Where is your customer?
- What do they need to accomplish?
- Why are they seeking help?

1. Tear off instructions.
2. Fold along dotted lines to create 6 blank segments.
3. Spend 1-2 mins sketching an idea in each segment.
4. In each segment, circle either “Know” or “Hypothesis.”

1. Know - or - Hypothesis?

2. Know - or - Hypothesis?

CAPTION:

CAPTION:

3. Know - or - Hypothesis?

4. Know - or - Hypothesis?

CAPTION:

CAPTION:

5. Know - or - Hypothesis?

6. Know - or - Hypothesis?

CAPTION:

CAPTION:

Capturing Customer Context

Worksheet 3: Capturing CROW



As you review the team’s sketches, capture relevant insights about your customer’s CROW.

<div>C: Character</div> <div><div>Customer identity</div><div>Cultural influences</div><div>Other notes</div></div>	<div>R: Relationships</div> <div><div>Human-to-device</div><div>Human-to-business</div><div>Human-to-human</div></div>
<div>O: Objective</div> <div><div>Short-term objectives</div><div>Long-term objectives</div><div>Potential obstructions</div></div>	<div>W: Where</div> <div><div>Locations? Public or private?</div><div>Visible elements</div><div>Objects at arm’s reach</div><div>Potential distractions</div></div>

Worksheet 4: Open Research Questions

Check the items you believe you understand, and circle those that require further exploration.



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C: Character

ATTRIBUTES

- ☐ How does your customer define their own identity to themselves and others?
- ☐ How does your customer differ from other customers when communicating?
- ☐ Would your customer have any physical limitations that might impact their experience?
- ☐ Which of your customer's attributes are underrepresented in the greater population?

ATTITUDES

- ☐ What cultural influences have shaped your customer's preferences and beliefs?
- ☐ What is your customer's likely emotional state when starting this experience?
- ☐ Would this customer have any relevant preconceived opinions or learned behaviors?

CHOICES

- ☐ Why would a customer choose to seek out your experience? Did they have a choice at all?
- ☐ What choices are you asking your customer to make when engaging with you?
- ☐ How does your customer express individuality? Is your experience part of that expression?

R: Relationships

HUMAN TO DEVICE

- ☐ How long has your customer possessed the device? Who owns it?
- ☐ Does your customer consider the device expensive & treasured, or cheap & disposable?
- ☐ Does your customer anthropomorphize the device? Are they likely to give it a name?
- ☐ How much time does your customer spend with the device, and how do they feel about it?

HUMAN TO BUSINESS

- ☐ Does your customer deal directly with your company, or a 3rd party?
- ☐ Did they get to choose to work with you, or is their choice limited due to circumstances?
- ☐ What are your customer's expectations of your business and your brand in this situation?

HUMAN TO HUMAN

- ☐ Is the experience used by multiple people? At the same time, or do they take turns?
- ☐ Who determines who will share a specific device? Head of household? Manager? Someone else?
- ☐ When sharing an experience, do your customers trust each other?

O: Objective

- ☐ What is your customer thinking when they engage with your product?
- ☐ What does your customer want to achieve when they engage with your product?
- ☐ If your customer was going to hire someone to do this task, what would the job description be?
- ☐ In what ways are your customers' objectives obstructed during their current experience?

W: Where

- ☐ In what location(s) will your experience be used? Will your customer be moving between locations?
- ☐ Where is the device located? Is it fixed or mobile? Does it need to be near a charger?
- ☐ What objects or devices are within arm's reach? Is your customer busy holding other objects?
- ☐ What potential obstructions or distractions exist in the likely environments of use?
- ☐ Where is your customer looking? Do they see the device at all?
- ☐ What are the social norms in the spaces in which the experience will be used?