

## **1.5 OBSERVATIONAL EMPATHY**

**Observational empathy** is a crucial component of the **empathize** stage in design thinking. It involves understanding users by observing their behaviors, emotions, and interactions in real-life situations. This approach helps designers gain insights into the **actual experiences** and **needs** of users, beyond what they might express verbally

### Empathize to Better Understand Your Customers

The first step in the design process is to empathize, which is the foundation for building a true understanding of your customer. Yes, even if you're an executive, you owe it to your business to get out there and engage with the customer. This is not something that you can hire out or have someone else do on your behalf. Make it a priority to have direct customer interaction, and make it part of your organization's culture to do it on a consistent basis.

Your first strategy session should plan the approach you'll take in empathizing with the customer if you're not doing this regularly yet. Once you get into the habit of conducting customer interviews/observations, you can spend this time reviewing insights as a team.

I could write an entire article solely on interviewing, but there are several ways you can better understand your customers' thoughts, emotions and motivations. And once you better understand your customer's choices and behaviours, you can better design for their needs.

Here's a list of standards for empathy interviewing, created by the D. School at Stanford:

1. Ask why. Even when you think you know the answer, ask people why they do or say things. The answers will sometimes surprise you. A conversation started from one question should go on as long as it needs.
2. Never say “usually” when asking a question. Instead, ask about a specific instance or occurrence, such as “Tell me about the last time you \_\_\_\_\_.”
3. Encourage stories. Whether or not the stories are true, they reveal how people think about the world. Ask questions that encourage people to share stories.
4. Look for inconsistencies. Sometimes what people say and what they do are different. These inconsistencies often hide interesting insights.
5. Pay attention to nonverbal cues. Be aware of body language and emotions.
6. Don't be afraid of silence. Interviewers often feel the need to ask another question when there is a pause. If you allow for silence, a person can reflect on what they've just said and may reveal something deeper.
7. Don't suggest answers to your questions. Even if they pause before answering, don't help

them by suggesting an answer. This can unintentionally get people to say things that agree with your expectations.

8. Ask questions neutrally. “What do you think about buying gifts for your spouse?” is a better question than “Don’t you think shopping is great?” because the first question doesn’t
9. Don’t ask binary questions. Binary questions can be answered in a word; you want to host a conversation built upon stories.
10. Make sure you’re prepared to capture. Always interview in pairs. If this is not possible, you should use a voice recorder. It is impossible to properly engage a user and take detailed notes at the same time.

### **Some Additional Hints & Tips**

Other helpful hints that you can use to prepare for your interview sessions:

1. Write your questions in advance. It is ok to run off script from time to time, but going in with a good solid list of questions will ensure a successful interview.
2. Structure your questions to ease into the conversation. The key word here is conversation. It is not an interrogation session. Making it feel comfortable and casual will yield better, more honest answers.
3. An interview session should be between 30 – 60 minutes. I find the best time is around 45 minutes, as it leaves time for you to prep for the next interview and it doesn’t feel as long for the interviewee.
4. Your scribe should try to copy the interviewees’ answers verbatim. The reason is you don’t want the scribe injecting their interpretation into the responses. You want raw data. I find it best to audio record the sessions, even when I have a scribe.
5. Interview at least five people. You need at least five to show a pattern. If possible, try to get all of your interviewing done in one day, rather than spreading this out over a long period of time.

### **The Power of Observation**

Another way to understand your customers is to immerse yourself into their world and perspectives. Observing users in their world gives you the opportunity to empathize with their experience, understand their context, uncover hidden needs and hear their honest and unfettered feedback (IBM Design Thinking). Observation also requires taking on a beginner’s mindset. What does that mean? Think about how 5-year-olds explore. They ask lots of “why” questions, they make no predetermined notions as to how something works, and they are truly fascinated

by what they see. A successful observation looks upon the customer's world the same way.

Here are some tips on gaining a beginner's mindset, shared by Stanford D.School:

- **Don't judge.** Simply engage with users without the influence of value judgements on their actions.
- **Question everything.** Question even things you think you understand. Question users on how they perceive their world. Follow up a "why" with another "why."
- **Be truly curious.** Try to observe from a different perspective.
- **Find patterns.** Try to find common threads that weave a similar story.
- **Listen.** Let everything sink in and soak up the scene. Really listen to what is being said to you or during your observation. Don't get distracted about thinking of what you will say next when someone is talking.

### 3 Methods for Observing Your Customers

#### 1. Natural Environment

Go out to where your customers are, whether it is a retail shop or a dealership. This is where you can gain a lot of insight in a short time. Sit and watch how interactions happen. Feel free to approach customers, and ask them questions about their experience. Some questions you can ask yourself are:

- How are users interacting with my product in a store?
- What type of questions are they asking?
- Who are they with?

The natural environment provides a lot of great opportunities for the observer. Don't just stop at one, however. Try to locate a wide variety of locations where your customers shop.

#### 2. Observation Lab

Another popular method is to create an environment to see how your customers engage with and use your products. At the Procter & Gamble Mason Business Center in Ohio, P&G set up a lab that takes customer discovery to a whole new level. At the oral health science "Insight Suite," a two-way mirror lets the company watch customers use products in a bathroom and kitchen. Researchers can then note how users interact with the products and what they use them for. Building a lab provides a different type of insight compared to the natural environment. Since users know they are being observed, it may create skewed results. However, it is still a valuable way to see how your customers engage with your products.

### 3. “Day in the Life” Home Observation

This one piggybacks off of observing the customer in a natural environment. Recruit customers who you can spend a day with and see how they engage with your product in a natural way. Let’s say you wanted to observe how a landscape crew uses their equipment. Reach out to some landscaping companies and see if you can tag along for the day. Observe how they schedule work in the morning, how a trailer get stocked with the equipment, how employees use the equipment out in the field, etc.

#### Additional Observation Tips

- If possible, observe in groups. Two eyes are better than one, and you can discuss the experience as a team once it is completed. If you can’t observe as a team, share your observations with a team later.
- Get to know the people you are observing, not just as customers but as people. Ask open questions on how they live and work.
- When observing, understand the context of the situation. What led to them going in and buying a product? Why did they decide to use the product that way? Watch the video below for a great example regarding the importance of context and experiences. And remember, the role of observation is to understand what the customer can’t – or won’t – always tell you.

#### Handy Tool for Observation Sessions

The Stanford D.School has developed a method called What? | How? | Why? that you can use during an observation session.

WHAT?	HOW?	WHY?
Write down what you observe.	Write down how the customer is doing it.	Write down why they are doing it this way. (Make a guess.)

Using this quick tool can help formulate your insights in a tangible way for discussion with the team later. And while observation is an important and often insightful method to empathize with your customer, remember – it can also be useful for internal processes within your organization.

Once I was in the office of a financial advisor to observe the selling process. I had

already interviewed this person and thought it might be worthwhile to watch him in action. One objective was determining how long it took to conduct a session with one of his clients, since he wanted to be able to meet with more people in a day.

In my observation, one thing stood out the most. It took a really long time for him to facilitate paperwork and reporting after he met with a client because he was using numerous disparate systems, and each took a while to load. This was not an issue he mentioned during the interview. I asked him why he didn't discuss that when we talked, and he explained that he just didn't feel there was anything that could be done to fix that issue. But it was worth exploring further.