

# What to Expect When You're Not Expecting It

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As practitioners, when we meet with people to conduct contextual research, our focus is driven by our client's business objectives, nominally investigating how our client's products are falling short of people's needs, or how this organization's core capabilities could achieve those business objectives by meeting those needs. Because of this, our work

leads us toward what's missing, which we identify as needs or opportunities that provide valuable direction and inspiration for our clients at all points of the development process. Along the way, however, we are inevitably astounded and affected by what exists outside of those explicit constraints. As professionals we believe this is why organizations

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should do research; as individuals this is a key reason why we do research. We indulged in a little reflection on some of the people we've met and how meeting them took us outside of the business questions at hand but had a real impact on the team and reframed the way we thought about the business questions. This opportunity to dwell on the exception provides a reminder of how these experiences deliver a potent dose of humanity to the business of providing products for people.

In the earliest days of one consulting engagement, we visited a young woman to talk about what seemed like a straightforward topic: digital photography and home printing. As we sat down together in her living room, surrounded by baby toys and child-rearing bric-a-brac, our participant (we'll call her Jenny) revealed that she had very recently separated from her husband and was dealing with that change in her life as well as managing her new role

as a single mom. While we came armed with dozens of carefully constructed questions to help us uncover greater insights about how people were managing their digital libraries and creating printed content, all Jenny could think about was the massive upheaval she was experiencing. You might as well have played D-I-V-O-R-C-E as the underscore to our entire conversation. When Jenny told us about her approach to taking pictures of her young child, she naturally spoke about how the responsibility for child rearing (such as documenting memories) had very recently shifted. Even sharing photos was something Jenny was being forced to reexamine through the lens of a change in the dynamic between her and her extended family.

The interview took a dramatic turn when the estranged husband, whose ears must certainly have been burning, burst into the house. He was tall, heavily muscled, and wearing a military uniform. And he was

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quivering with barely suppressed aggression. He demanded to know who we were and what we were doing; in our most calming tones, we explained the project and its goals. He glared at us for a moment, and eventually he and Jenny went to the other room to discuss in muted yet intense tones. During those few minutes, we both sat quietly on the couch, imagining what sort of situation might erupt and how we might respond. After he left and Jenny apologized, we continued our discussion of printing and digital images, but we were now insiders, having shared in the experience of Jenny's relationship situation. The interview was still essentially about Jenny's pressing life issues, but our having participated in that scenario rendered the issues more implicit, and we were able to delve deeper into questions of product use.

During another project, focused on consumer technology, we encountered a man who caused us to rethink the role that digital devices might play in people's

lives. One participant, whom we'll call Bruce, told us how he was hit by a car while riding his bicycle. While we were dutifully asking him about usage scenarios and desired features for his devices, he quietly told us about the isolation his recuperation brought on. For Bruce, a "mobile-computing task" like going into Starbucks with his laptop was a way to reconnect with his community. While we might have expected a tech-as-hero story about how he used his devices to keep in touch with people while housebound, we learned that these devices were now serving as props. Bruce passionately emphasized how as his physical mobility increased, his laptop and other technology served as excuses to get out of the house, opening the world up to him again and serving as companions as he reintroduced himself to the world. His story moved us deeply and allowed the team to recognize that what they were seeking to enable went far beyond performance specifications.

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This interview follows a familiar pattern in these studies: We start with what we know and what we want to know, but we make sure to create space for people's fascinating and unexpected stories to emerge. At a distance, none of these stories is surprising, but what continues to surprise us is their ability to empower teams to see past the bills of materials and MRDs that can smother workaday lives.

Another unexpected but essential outcome is a revisiting of whom we understand our customers to be. This aspect of research can be a vicious tautology since we choose—often through rigorous definition—which customers to study, sometimes literally pulling names from lists of individuals who have purchased our client's products. One surprise came in a lengthy project that explored how people were experiencing major transitions with a financial services firm. We worked with people in different regions of the country, at different points in this transition. But during a final

round of ethnographies, we found something we hadn't planned for: people who were (to use the ugliest jargon) edge cases. A number of participants, without realizing it, had certain criteria that meant their transition was handled differently. One woman (let's call her Alana) had been providing us with regular updates over the course of the study, describing her frustrations and challenges. When we finally sat down to meet with Alana, the extremity of her situation became palpably clear. Her voice rang with emotion as she related the disconnect she had been experiencing. While we can't be specific about the transition or exactly how she was an edge case, suffice it to say that at one point in the interview, she began to cry. Given that Alana was essentially a misrecruit (someone who wasn't actually using the recently launched services), we uncovered a crucial opportunity for the organization to do a better job at designing for a whole class of "other" customers. We've often heard the refrain that a certain individual "isn't our customer." That rhetoric tends to be

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used to mask the uncomfortable truths revealed during fieldwork. Fortunately, our clients here recognized the new opportunity and returned to their own organization prepared to advocate for this group of people.

In another case, leaving the familiar behind yielded a powerful perspective for the design team. While in New York City to study people using high-end consumer technology, we were up against the clock to find the last few participants. Our client was open to creative recruiting, so we used craigslist and found a woman we'll call Manuela. As we made our way toward the interview, we began to realize that this session was not going to be like the others. Having spent the previous few days talking to people in the enclaves of the Upper East Side and Brooklyn Heights, we felt challenged as we traveled deep into East New York, a gritty Brooklyn neighborhood known for its high crime rate. The challenges kept coming. Manuela is a hoarder, complete

with the requisite cats. The smell in her sizable family home was overpowering. After descending two harrowing flights of stairs to the basement, past the floors where her grown children and elderly mother live, we sat on the floor to conduct the interview (this was the only option). We saw bugs. Yet Manuela's warm personality and intense storytelling style rendered the uncomfortable environment neutral. She explained that her father was in the hospital, dying of cancer. She told us of her work as a funeral director and her passion for playing the lottery and reading romance novels (which she emphasized by pointing to a corner of the room piled high with them). Neither Manuela nor her environment corresponded with what our client's team had in mind when they set out to learn more about their customers. Yet she was one of them: We observed, tucked amid the mountains of household debris, a new high-end HDTV, late-model game consoles, laptops, and other items in our client's categories. An underlying

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paradigm of the project—whom we were designing for—was enlighteningly disrupted. Rather than dismiss Manuela as an outlier (or worse), our client embraced her story as an object lesson in reality, reminding designers that their designs must fit more than the privileged, pristine environments they like to imagine.

These sort of surprises and reframes are necessarily part of the process; they are ultimately why we do this type of work and why it's valuable, but they are sometimes at odds with the focused activities and totems of research objectives or the careful structure of proposals, scope changes, and participant screening criteria. Every project and set of interviews reveals surprises, personal revelations, confessions, and sometimes even tears. It's key to wallow in and celebrate these moments, not as exceptions, but as important beacons that empower design teams and strategists to transcend their confined objectives.

## **About the authors**

Steve Portigal is the founder of Portigal Consulting, a bite-sized firm that helps clients to discover and act on new insights about themselves and their customers. In the past 15 years, Portigal has interviewed hundreds of people, including families eating breakfast, hotel maintenance staff, architects, rock musicians, home-automation enthusiasts, credit-default swap traders, and radiologists. His work has informed the development of mobile devices, medical information systems, music gear, wine packaging, financial services, corporate intranets, videoconferencing systems, and iPod accessories. He writes regularly on topics from interaction design to pop culture for interactions, Core77, Ambidextrous, Johnny Holland and the Portigal Consulting blog, All This ChittahChattah. He is an avid photographer who has a Museum of Foreign Groceries in his home.

Julie Norvaisas is a consultant with Portigal Consulting. Over the past decade Julie has uncovered insights from farmers, Little League players, nurses, pharmacists, and NASCAR fans. Her work has informed the development of hand tools, over-the-counter pharmaceuticals, telecom services, sporting equipment and medical devices. Julie has lectured on the application of qualitative methods to product development and strategic innovation at the University of Wisconsin, Korea University and the Institute of Design. She has a Bachelor's degree in Art History from the University of Wisconsin where her studies focused on shifts between realism and abstraction.

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