

Rethinking Users

**THE DESIGN GUIDE TO
USER ECOSYSTEM THINKING**



Including User
Archetype Cards and
step-by-step team
activities

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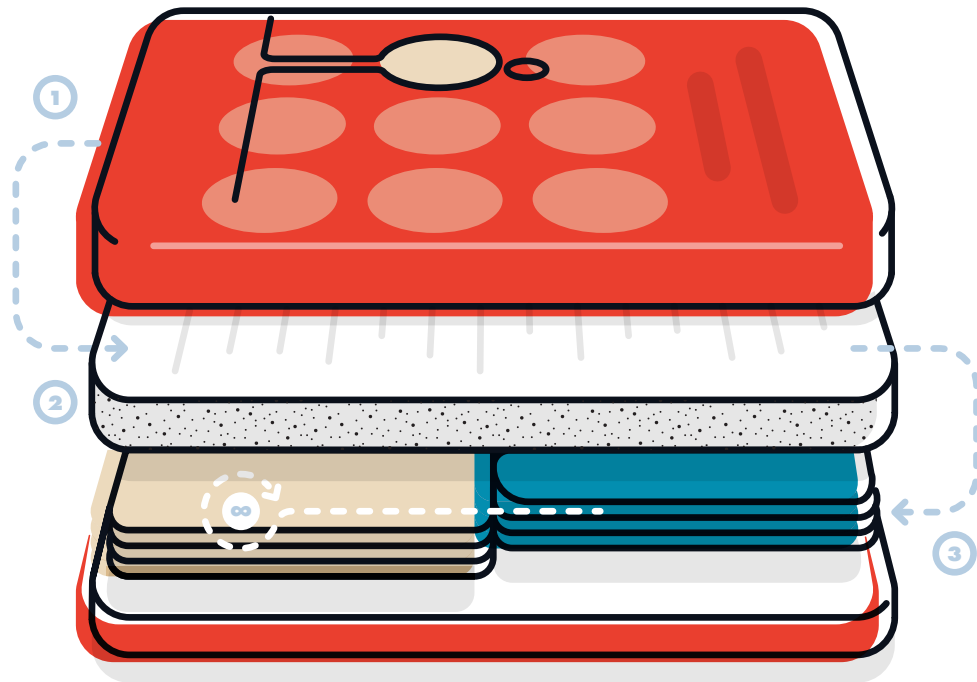
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SECTION 1

How to Use This Book and Card Set

This book, and the cards and exercises that come with it, are a toolkit and a provocation for a new way of thinking about users, user experience and design. It's an approach we call *user ecosystem thinking*.

We set out to make each of these components useful for specialists and non-specialists alike. If you have a background in human-centred design or design research, you may feel tempted to jump ahead and start playing with the cards. If you're not in a hurry, we recommend reading page by page, so you have the best idea of where we're coming from and what

we're envisioning. A thorough reading will be especially helpful for getting the most out of the user archetype descriptions in Section 5 and the team exercises in Section 6.

But this book isn't only for those who identify as designers or design researchers. We expect it to be useful for innovators, strategists, product managers, entrepreneurs and other visionaries of all sorts. Our students and clients have come from law and business, social services and urban planning, medicine and human resources, publishing and consumer electronics and just about everything in between. Whenever we've shared the core ideas of this book with others and gone through the team exercises, we've been bowled over both by the range of ways they put these to use and by the new perspectives that user ecosystem thinking can lead them to in their particular field.

Here's a preview of what you'll find here.

Why This Book? (Loud Man on Phone Provokes Insight)

This short section explains the basic rationale and objectives for the book and outlines the key propositions that are fundamental to our approach.

SECTION 2



Scalpels Aren't Just for Surgeons

In this section, we consider some specific ways that conventional conceptions of the "user" are incomplete. We describe what we mean by design and how it should support users and we offer a definition of "user" that is in line with our perspective. We follow this with a few cases of design challenges from our own work that pushed us to imagine better solutions by thinking more broadly about users.

SECTION 3

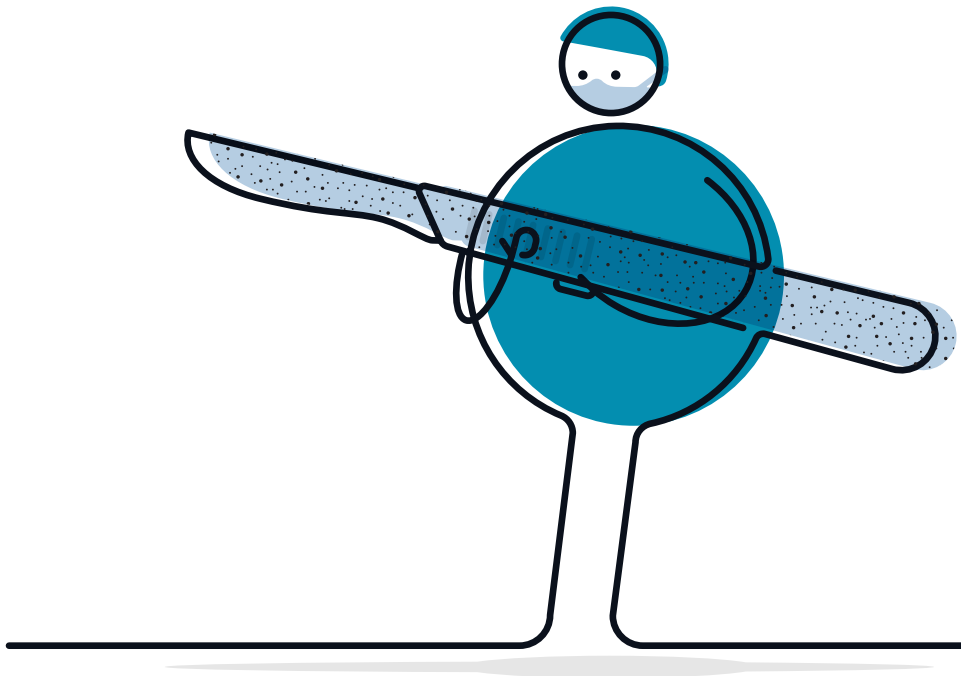


Looking More Closely at Complex User Ecosystems

Here we dig deeper into the concept of *complex user ecosystems* and give some examples. We also lay out some approaches to putting user ecosystem thinking into action.

SECTION 4





SECTION 3

Scalpels Aren't Just for Surgeons

DESIGN AND ITS USERS

Design is one of those words that seems extraordinarily simple and yet means so many different things to different people. If you're a designer (like Haidary) or in some other design-related practice (like Youngblood and Chesluk), you've probably experienced this yourself. To many people we meet at dinner parties, asking us about our jobs, design means something like visual design, product design, or industrial engineering. To some, it can mean fashion design or interior design. None of these are wrong; they're just only partially correct.

For people in the design and innovation world, design covers all that ground and so much more.

When we talk about design in this book, we're referring specifically to *human-centred design*—and we have a particular definition in mind.

We see design as the *thoughtful and purposeful conceptualization of novel products, services, public spaces and just about anything else, tangible or intangible, with the intent to solve a problem for one or more users.*

This definition may not be perfect—and not all design theorists would agree with us—but it gives you a good idea of where we're coming from and how we view design's role in the world. And though we don't think design is synonymous with "innovation", for the purposes of this book we think they have enough in common that you'll find us using the terms more or less interchangeably.

Our definition of design has two important criteria: *solving problems* and thinking about *users*.

Does design need to solve a problem? We think yes. Or at least it should try. Not all design problems are necessarily earth-shaking, but if a conceptualized artefact is not aimed at solving some sort of issue or affording some sort of new opportunity, we would call that process of conceptualization something other than design.

Does design need to have a user? Again, we think, by definition, yes. Sure, it's possible to design a solution strictly for one's own use but, even then, the designer has to imagine herself or himself in the role of the future user of the newly designed product or service.

So, when we talk about design "artefacts" in this book, we simply mean the stuff, the realized solutions, that are the output of design. Design artefacts may be tangible (say, a new consumer product) or intangible (such as a new process or service). They may be something users engage mostly tactilely (such as a touch screen or a tennis racquet) or through other senses (such as by hearing the tones of a wake-up alarm or seeing the configuration of a store interior). All these artefacts come into being through at

USERS IN THE SURGICAL ECOSYSTEM

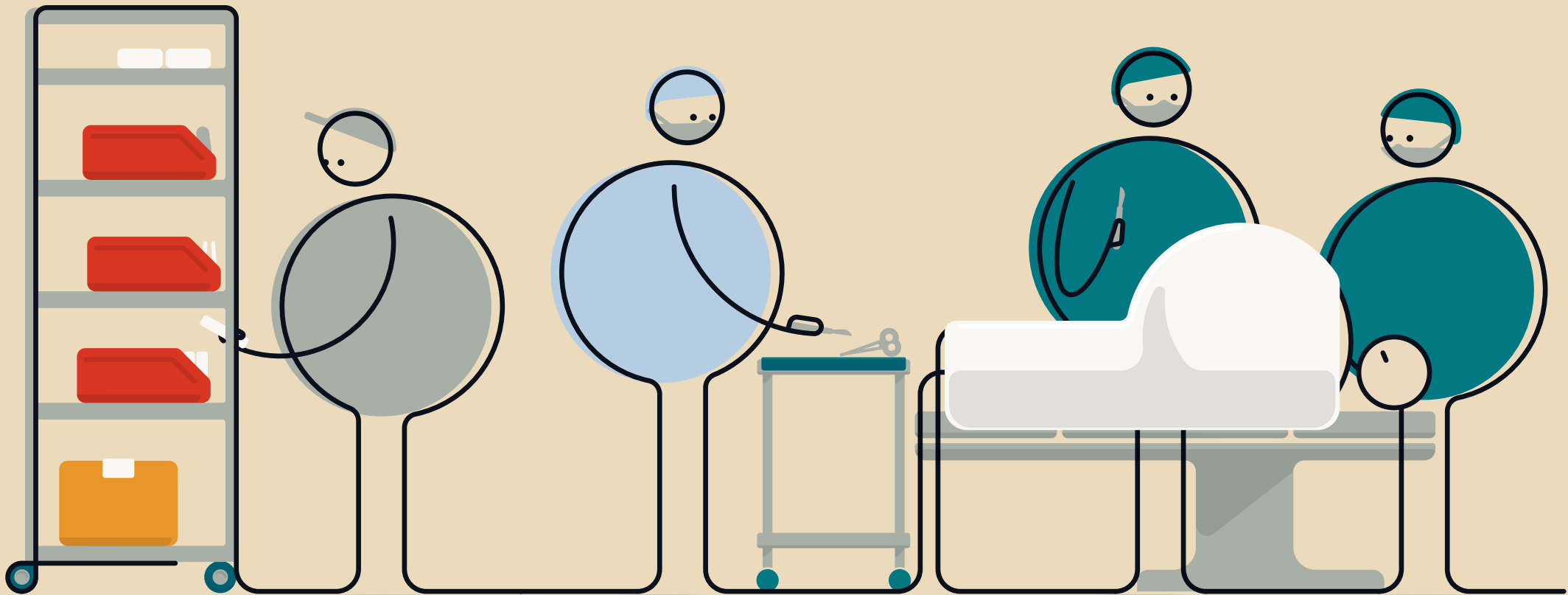
For an incisive example of a broad range of users in a complex user ecosystem, we can step back into the operating room we visited earlier to watch a surgical procedure. We'll focus on the main device in the surgeon's hand—perhaps a surgical stapler as described earlier or something else, such as an ultrasonic scalpel—to map out the complex user ecosystem for that particular device.

The first people we notice are those in the group standing immediately around the patient on the surgical table. There is the surgeon with the device in hand. The surgeon is the direct user of the device and, as discussed previously, probably a person the design team for that device knows a lot about. Grouped around the patient with the surgeon are other

physicians, who may also directly use the device and/or play supporting roles (like holding back tissue so the device can be placed properly). Maybe they are trainees the surgeon will hand the device to for specific portions of the procedure, at which point they become surrogates for the surgeon. For these trainees, the surgeon governs their use of the device.

All these people might trade the device back and forth and perhaps use it in different, complementary ways at different times—a cutting tool can play a temporary role holding back the edges of an incision; the blunt tip of a stapler could be used to separate tissue from time to time.

There is also the scrub nurse standing just outside the tight group of physicians, observing precisely what is going on and



The user archetypes embed users in an ecosystem of experiential linkages and design ramifications that we often overlook.

product or service, not what they might be trying to accomplish, what they might hope would happen or even whether they would see the outcome of their engagement with the product or service as successful or not. These are aspects of experience better explored through other means, such as user research and observation with real people.

In our initial list, for example, we had included a “hacker”, a “saboteur” and a “contributor” as exemplars that seemed to highlight different ways of engaging artefacts that resulted in changes to those artefacts. After much consideration, however, we realized that the only meaningful differences between these were the users’ goals and intended outcomes (i.e., to hack, sabotage or contribute to something). It became clear to us that, if we used intentions and goals as criteria for defining the archetypes, we could have created an endless list based on innumerable intentions and goals that would have quickly lost its usefulness. Instead, we ruled out intentions and goals and merged these users into a single goal-neutral archetype that we called the *generative user* (a user who causes change to an artefact).

Finally, we disqualified any archetypes that were overly abstract and theoretical—even if they felt interesting. To help with this task, we gave ourselves a rule that we should limit the archetypes to forms of relationships between subjects and objects that we could readily see in the world around us or had actually witnessed in our own work. We wanted the forms to be derived empirically, from the real world.

After a good deal of field-testing and workshopping the survivors, our final list became a card set of 15 archetypal forms of user experiences that we’ve found extraordinarily useful.

Together, the User Archetype Cards help to disrupt the basic subject-object assumptions at the core of many conventional ideas of user experience. They embed users in an ecosystem of experiential linkages and design ramifications that we often overlook. These cards and the card-based exercises offer structure for navigating through some of the ambiguities of planning user research and doing user-centred design.

In the rest of this section, we describe each User Archetype Card and its purpose. For each of the cards, we’ve tried to make the descriptions and examples as straightforward as possible. While the archetypes are grounded in a lot of careful consideration, we’ve aimed to make them feel familiar, easy to relate to and easy to recognize in the world around us. We can all probably think of times that we have been one or another of these user archetypes. For some of us, maybe even all of them in one day!

For each of the User Archetype Cards, we’ve included some examples of questions that can spur team brainstorming about who these archetypes might represent if they were actual people experiencing products and services in the real world.

And keep this in mind: most of the real-life examples we provide depict the archetypes as human beings. That might seem like the only possibility—but, as we mentioned earlier, there are many instances in which products or services can themselves become active participants in complex user ecosystems. As you go through the User Archetype Cards, feel free to consider ways in which design artefacts rather than human beings might fill some of these roles as well.



THE USER ARCHETYPES

- 01 Direct User
- 02 Indirect User
- 03 Intermediary User
- 04 Governing User
- 05 Dependent User
- 06 Parallel User
- 07 Complementary User
- 08 Serial User
- 09 Surrogate User
- 10 Terminal User
- 11 Ambient User
- 12 Conglomerate User
- 13 Autonomic User
- 14 Oblique User
- 15 Generative User



ARCHETYPE

06

Parallel User

“I engage the solution along with others who engage it in a similar way”

The Parallel User Card helps us think about ways that multiple users, engaging the same artefact in essentially the same manner, can affect each others’ experiences in large and small ways. For example, we could think of two or more players in a multiplayer computer game. To the extent that they are all playing by the same rules and are having predominantly similar experiences with the game, they are parallel users. But they do not play in isolation from each other—rather, the players together shape the progression of the game.

A good example of artefacts that were designed with attention to parallel users: web-based applications that enable multiple users to add content collaboratively (such as Google Docs). Think of students doing a team homework assignment together on a single online document, each contributing to the document in more or less the same way from wherever they are.

In the analogue world, here’s a good example of an (as yet) missed opportunity, also arising from parallel use. Imagine two people in the same household who are each preparing to take a hot shower in different bathrooms connected to a single water heater. These two people are parallel users of the water heater—but, if neither of them knows that the other is also showering, they might both run out of hot water before either of them is finished. Thinking about parallel users could inspire us to design a shower experience, or a water heater experience, that could avert such an unpleasant event.

Or how about this? Imagine Oscar and Tina want to listen to music together, but they have only one set of earphones. As a workaround, they decide to use the earphones in parallel—Oscar taking the left and Tina the right. Unfortunately, music in stereo is typically mixed differently for each side, so neither of them would be able to hear the songs completely through just one earpiece. What if their earphones gave them the option of a

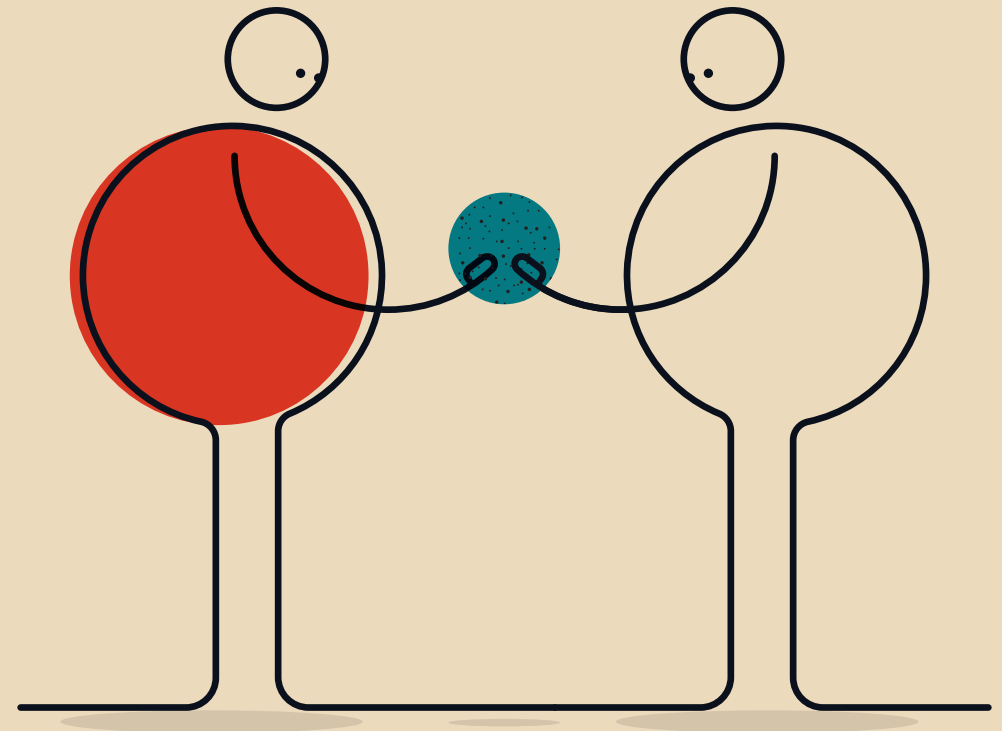
“shared” mode, blending the left and right channels for listening with a friend?

Parallel use is happening all around us. If you have wandered through the stacks of a library, shopped in a store or driven on a highway, you and all the others seeking information, looking for great things to buy or getting yourselves from point A to point B are, in at least some ways, parallel users.

As we’ve observed it, parallel use often happens in roughly the same time frame. But it can also be asynchronous. For example, people playing chess online can make moves on the same board, following the same rules, but out of sync with each other—someone might step away from the game and not come back for a while.

Things to think about

- » Was our product or service designed with parallel users in mind? Should it be?
- » What are some possible examples of parallel use for our product or service today? In the future?
- » When and where are parallel users engaging our product or service? At the same time? Same place?
- » In what ways do parallel users support or inhibit each other?



SO, THAT'S ALL OF THEM?

No, not necessarily.

We think these 15 User Archetype Cards are enough to get your team thinking differently about users—but we don't insist that they cover all possible forms of user engagement. You may think of additional kinds of engagement that are provocative for your specific area of work. In which case, kudos! (That's what the blank cards are for.) But if you do decide to create archetypes of your own, be sure to refer to the guidelines at the beginning of this section that we followed when we were going through the same process. Otherwise, as initially happened to us, you might end up adding archetypes upon archetypes that seem useful in the moment but may lead you nowhere.

LET'S NOT BE OVERLY LITERAL

For simplicity, we've illustrated the archetypes interacting with solutions that are tangible and thing-like (that cool blue orb). But don't get hung up on those images! These archetypes work for environments, services and other intangibles as well

EMBRACE FUZZY BOUNDARIES

One last note on the User Archetype Cards. Did you notice that some of the archetypes feel a little more specific than others? As we mentioned earlier, the archetypes sometimes overlap with each other or seem to nest under other archetypes. This is not an accident. The archetypes are all thinking tools, each intended to spark new questions and insight in different ways.

FIFTEEN USER ARCHETYPES, ONE KITCHEN

Now that we've described the 15 user archetypes, let's look at how all these forms of user engagement could apply to a single, specific ecosystem. For our example, let's picture a shared commercial kitchen "incubator" facility, a kind of business becoming increasingly common in some parts of the world, in which food start-ups and small businesses can rent dedicated space or pay by the hour to prepare food.

It's easy to identify a *direct* user in this kitchen: the entrepreneurial cook renting space to make a food product. An *indirect* user could be a business partner or family member who

doesn't work alongside the cook in the kitchen but tastes the product and gives advice. *Intermediary* users might be friends who prep the kitchen space before the strapped-for-time cook actually arrives.

The on-site managers of the kitchen could be seen as *governing* users, as could local officials who might drop in to conduct safety inspections. A *dependent* user might be an intern or trainee using the kitchen under the cook's supervision.

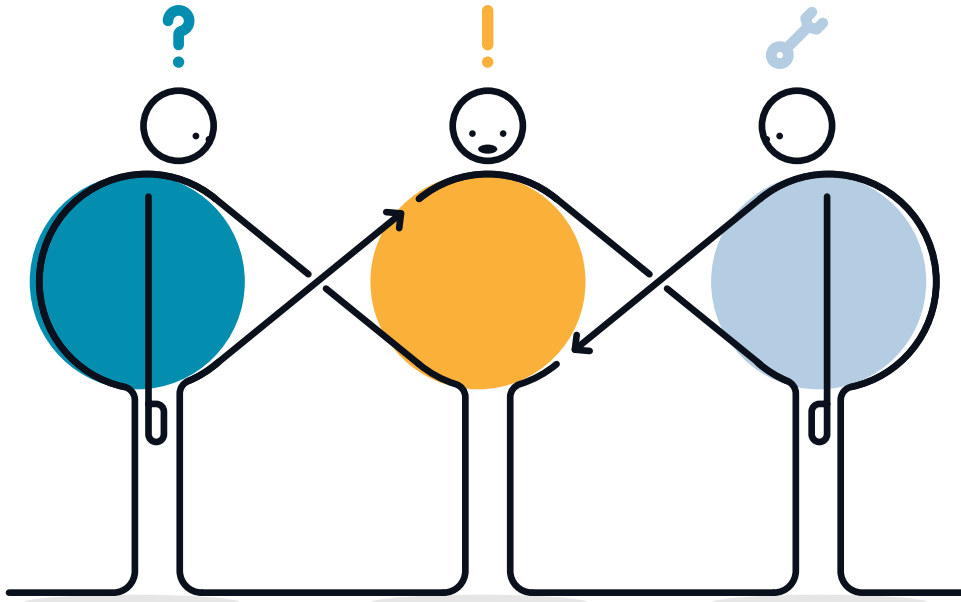
All the different cooks working alongside each other could be considered to be using the kitchen in *parallel*. Some might be using the same space in very different ways—one spending hours experimenting with new recipes or ingredients, another briefly stopping in to put finishing touches on something they started at home, a third getting feedback from fellow renters on new package designs—in which case they could also be considered *complementary* users.

Serial users might be cooks who rent the same space within the kitchen for an hour or two at a time, one after the other. A *surrogate* user is perhaps someone who temporarily steps in for a renter—say, someone taking over for a friend who has to leave unexpectedly, before their product is done.

A restaurant employee picking up food made in the kitchen could be a *terminal* user. Pedestrians walking past who have to step around cooks loading or unloading could be considered *ambient* users of the kitchen, as could workers in adjacent buildings who might be able to hear or smell the kitchen in use.

Conglomerate users of a commercial kitchen might be cooks who use hands-free voice commands to set timers and adjust oven temperatures. And an *autonomic* user could be someone using a future-state kitchen that knows to reset and adapt itself as new users arrive or leave.

An *oblique* user is perhaps someone who scavenges the dumpster behind the business for food or worn-out kitchen equipment. Finally, *generative* users could be creative cooks who alter the shared space and equipment to change what they and others can make there.



SECTION 6

Team Exercises for User Ecosystem Thinking

Designers and innovators bring users into their practice in many ways. Some teams are inspired by their users throughout the full cycle of their design process. Others tend to focus on users only during very particular phases of their work. In some cases, teams may collaborate very closely with users and regard them as co-designers. In other cases, teams may spend almost no time

at all thinking about users—perhaps due to time and budget constraints, because they believe they already know their users or because they feel they are creating something so new and intrinsically valuable that the new technology or service itself is all they need to focus on.

We've seen all these approaches and more.

Our intent is not to insist that user research and collaboration with users is always essential (though, frankly, we're overwhelmingly inclined to believe that it is). Rather, what we'd suggest is this: to the extent that a notion of users does play a role in your design process, try to develop the habit of visualizing many different forms of ecosystemic relationships users may have with each other and with your product or service.

If that's as far as you get, it's a great start.

But if you take things further and adopt user ecosystem thinking throughout your work, we think it could really pay off for your organization. And for your users.

We've been experimenting with user ecosystem thinking in our workshops and classes as well as in our work with clients and colleagues. In the process, we've discovered ways to work with the archetypes that have been very effective at pushing teams to reimagine their users and identify wholly new kinds of solutions and strategies for their businesses.

In this section we want to share a few of the team exercises that we've found useful with the User Archetype Cards. Like the archetypes themselves, we don't see these exercises as some sort of golden key that unlocks all doors. Rather, we see them as a way to shake things up, change perspectives and explore new possibilities. We encourage you to think of these exercises as prototypes that you can experiment with and build upon to make them suit your own design process and goals.

Some of the exercises begin with an exploration of current products and services and their current user ecosystems; others dive directly into imagining products and services (or features and functions) that do not currently exist.

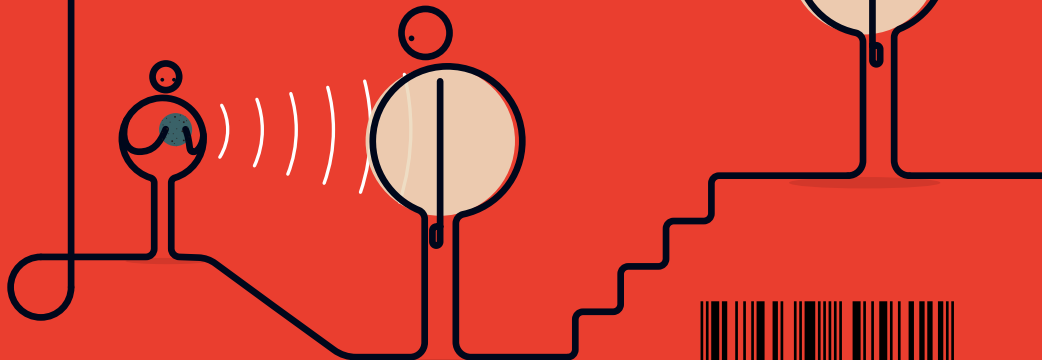
We want to be super clear about this: we are *not* suggesting that these exercises are substitutes for user research. We're deep



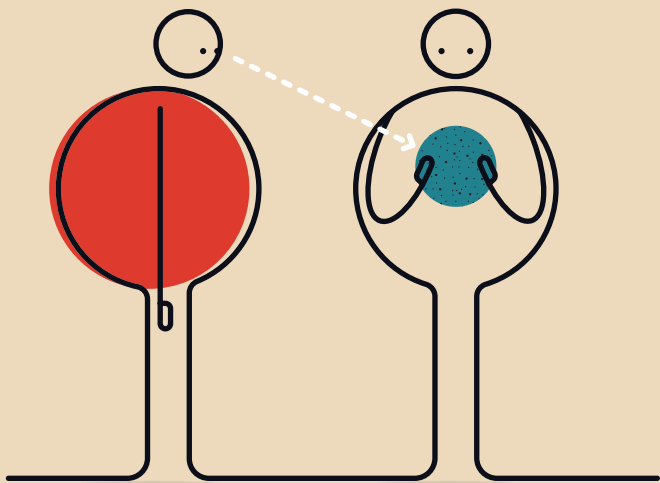
RETHINKING USERS

This fun and practical book and card set proposes a fresh approach to user experience. The way we think about "the user" in design is incomplete and needs an update—especially in today's complex, technologically interconnected world. This book lays out an exciting new approach that will stimulate your imagination to identify new opportunities and create more engaging and effective design solutions.

The book includes a deck of User Archetype Cards and step-by-step team activities for unlocking "user ecosystem thinking" for designers, design researchers, strategists, innovators, product managers and entrepreneurs in any field.



ARCHETYPE 02



Indirect User

I engage the solution personally but indirectly, through another user's use

Indirect User

THINGS TO THINK ABOUT

Was our product or service designed with indirect users in mind? Should it be?

What are some possible examples of indirect use for our product or service today? In the future?

Why and in what ways are these users' engagements with our product or service indirect?

What are some advantages and disadvantages for users when they experience our product or service indirectly rather than directly?



WRITE ADDITIONAL QUESTIONS
ON A STICKY NOTE AND ATTACH