DESIGN RESEARCH MASTERY

How to Lead Research That Builds Buy-In and Great Products

Sara Fortier

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BIS Publishers

For my parents — thank you for teaching me the value of hard work and to always go after my dreams.

For Chris, Jackson and Heidi — thank you for giving me wings to pursue those dreams.

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"Becoming a customer-centric organisation requires more than just insights: it takes influence. Alongside a fresh perspective on research in the age of AI, this book shows you how to drive change, build stakeholder trust and navigate the politics of design. If you want your research to matter, start here."

— Jim Kalbach

Author of *The Jobs To Be Done Playbook* and Chief Evangelist at Mural

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"With *Design Research Mastery*, Sara Fortier has given us frank and actionable advice to propel design researchers forward in a pivotal moment for design and technology, where research is more critical (and misunderstood) than ever."

— UX Magazine

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"With hard-won experience, Sara Fortier offers more than just research tactics. She delivers a framework for human connection that drives meaningful change, rooted in the belief that great research starts with deep listening, and earning trust through understanding. *Design Research Mastery* is a guide for lasting, positive impact — not just on products and services, but on the people and teams you serve."

— Gerry Scullion

Director at Humana Design and Founder of This is HCD

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"With empathy and clarity, Sara empowers researchers with the tools they need. This is the book to read when you're ready to conduct exploratory and generative UX research that makes a difference — adding value to both your organisation and your career."

— Cory Lebson

UX Research Consultant and Author, *The UX Careers Handbook*, 2nd Edition

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"This book transforms user research from simple storytelling to compelling storyselling, making it indispensable for designers at every stage of their career. With its blend of theory and hands-on advice, this is the book I wish I'd had when starting out. It's both a roadmap and a source of inspiration for the next generation of design leaders."

— Wonjoon Chung

Associate Professor, School of Industrial Design, Carleton University

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"This book is an excellent and accessible overview of what it takes to drive success in design research. It serves as an invaluable guide for applying a user-centered approach in real-world contexts, where alignment with business goals and organisational objectives is essential. The book also covers some of the most common and practical research methods used by design researchers and importantly shows how to effectively translate data into usable insights and compelling design storytelling."

— Bjarki Hallgrimsson

Associate Professor, School of Industrial Design, Carleton University

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Preface

WHY I WROTE THIS BOOK

And Why You Should Read It *

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"Continuous effort — not strength or intelligence —
is the key to unlocking our potential."
— Winston Churchill

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Introduction

Design research projects aren't exactly known for always succeeding or going the way we planned them to. They can be difficult to get off the ground, complicated to organise, time-consuming to run and frustrating to defend to every stakeholder who wants to know why you couldn't just look at a marketing survey or ask AI. But if we become true design research experts, we can inspire the kind of product and service innovation that creates amazing experiences for users, and propels careers and organisations to new levels of achievement.

I've written *Design Research Mastery* to go beyond your standard design research guide. It's an industry manual for elevating your career, effecting meaningful change and running research projects end to end. Mastering design research methods and learning how to conduct research well is, of course, paramount (and I will absolutely get into that in detail). But before we dive into all the tools, planning and processes involved, we need to talk about why so many design research projects fail to effect change — why we don't see our solutions implemented, and why our work gets overlooked or put on the back burner. Only then can we start to rewrite the narrative.

The truth is, we can drive ourselves crazy running around interviewing users and organising diary studies. But the findings, insights and design recommendations we draw from our research will be pointless if: a) they aren't actionable (i.e. they're not feasible or they don't clearly address key problems in the product or service) and b) they aren't listened to or accepted by the people making the business decisions.

These facts are tough to accept and even tougher to problem-solve. That's why I want to help. Because the UX and service design industry is full of talented people who are capable of creating impact. And to do that, you need to create opportunities for the kind of research that uncovers game-changing insights.

THE INTENTION OF THIS BOOK IS TO:

- **Speak to those who are passionate about human-centred design** and want to do more design research, but feel frustrated, undervalued or unsure of how to gain support for their work (This includes UX researchers, UX designers, service designers, product managers, or any multidisciplinary practitioners looking to play around in the field of human-centred design)

- **Help those same people build trust with stakeholders and convince others of the value of design and research**, so they can gain more opportunities to conduct research and drive change

- **Give them the tools to lead successful research projects and deliver amazing insights** that can transform products and services for the better

Future-Proofing Your Career

It seems like people in the tech space are running into more and more existential questions about the value of their work and the future of their careers. As I write this book, there are tools emerging daily that claim to outright replace UX, service design and design research processes entirely. This is leaving practitioners in our industry unsure about what's next for them, and it's also raising some doubts about investing time into learning or improving these processes, when so many of the steps involved are already being optimised or executed with AI.

While I'm not done developing in my career (we never are), I've been in the field long enough to know that new technology and new changes to the way we work are totally normal, expected and workable. It can be scary at first, but remember that tools are just tools — they need people to wield them. The longevity of your career is not going to be defined by the tools you used or didn't use. Instead, it'll be defined by the quality of the working relationships you build, the tangible value you bring to organisations and the users they serve, and the ways that you evolve your strategic and creative mindset.

Here are the key reasons why this book will help you conduct impeccable design research in the AI era.

- **AI can make you work faster, but you need established expertise to use it effectively.** Yes, AI is already revolutionising the way we do our work. It's taking all of the time-consuming tasks in design research and helping us to make them more efficient — recruiting and scheduling participants, and conducting data analysis, visualising findings, etc. BUT, if you don't know what prompts to give AI, what feedback to give it when it outputs a wrong or inaccurate answer, or even how to tell when an answer is wrong or inaccurate, then it will make your work sloppy... and you'll perpetuate the bad rap that design research already gets. So, no matter which tool you're using, you need to know your stuff first, before you can augment your speed with new technology.

The upcoming chapters are designed to help hone that expertise, and fill in knowledge or experience gaps, so that you can be highly strategic (and confident) in your work and your use of AI.

- **Empathy is innately human, and it's a central part of researching and designing for human needs.** Design research is a key component of the human-centred design (HCD) process. And a core tenet to the philosophy of HCD is empathy and understanding for the people affected by the product or service we're studying. Machines can never develop true empathy — so as practitioners, you need to embody that "empathy" factor. It's your job to represent the feelings, pain points and needs of your users, and you can only do that when you talk to them and learn from them. (Never forget this, and don't let your stakeholders forget it, either.)

  This book will teach you how to study your users or customers in a highly empathic and unbiased way that creates tangible and actionable results for the businesses you work with.

- **To make an impact, you need to grasp complex contexts.** A critical part of the work you do in design research is understanding the nebulous and ambiguous information in front of you, connecting the dots and finding a way forward. You need to read between the lines, gathering information from all the different areas of the business, stakeholders, and of course users... and you need to understand when to probe deeper, when to pivot, and when to push forward, based on what you're hearing, and what your goals are. This isn't something AI can grasp completely on its own.

  The chapters on research planning (6–7) and making sense of data (12) should be especially helpful in training this uniquely human design research "muscle."

- **AI can't herd cats (or build strong relationships).** The reality of this work is that it's all about people. You study people, and you work within groups of people (teams and stakeholders) to understand what you need to research, why you're doing the research and where it adds value in the transformation of a product, service or organisation.

  Inevitably, when you're working to effect real change, you deal with a lot of misaligned opinions, differing priorities and political dynamics. In UX, service design and design research, we often joke about herding cats, and the lessons we've had to learn in facilitating conversations and initiatives between people that have different ideas of what should be done or what's important. No tool can do this for you end to end. It's up to you to form positive relationships, listen to stakeholders and gently align all of your collaborators toward a common goal.

  This is why stakeholder management is a key throughline in this book... although, I encourage you to see it less as "management" and more as collaboration.

- **Strategy and storytelling will become your superpower.** Finally, when you put together your abilities to hold both empathy and context, and you become

an expert in stakeholder alignment, you'll find power in your capacity to translate research findings into something highly valuable and tactical. This, combined with design storytelling, is the magic of design research — it's what allows your project to move from research findings to insights, and from insights to meaningful action. It's what wows stakeholders and compels them to make real changes to their products and services, and to make better experiences for their users.

Telling a compelling and motivating story requires an emotional connection to the research, as well as a strategic perspective on what will best serve your users while also driving incredible value and a return on investment (ROI) for the business. Once you have this, you become a master of design research.

In this book, I'm giving you every piece of advice I've collected over the course of my career to help you build long-term sustainability in your career, so you can keep doing the work you're passionate about AND ensure that your work actually has an impact, whether it's AI-assisted or not.

As a first step, let's look at why it's so hard to conduct successful design research and convince stakeholders of its value.

The Design Research Knowledge Gap

Better experiences make for a better world. Most people working in UX, service design and design research have a deep-seated ambition to make an impact. So, naturally, when we join a new team or project, we tend to start out feeling creative, optimistic, curious and excited to make things happen.

But then, that starts to shift. We start hitting roadblocks and challenges: shifting priorities from leadership, feature releases disrupting our work, technology limitations, team silos, tight budgets that constrain our research, logistical barriers to connecting with real users, and stakeholders who don't see the point in our work. All that can leave us confused, discouraged, frustrated or burnt out, and it can get in the way of accomplishing anything meaningful.

Why does this shift happen?

The problem is, there's a gap between our formal training and the actual demands of the industry. I've read a lot of great books about design research while in school and throughout my career. They've helped me absorb the fundamentals and the broader steps involved, and they've often inspired me with examples of really innovative projects. But none of them prepared me for the demanding, multi-skilled work involved in actually effecting change.

How you feel at the start of a new project:

How you feel a little later, when reality settles in:

Let's take a look at the "expectation versus reality" for the experience of conducting design research in the industry.

What we think design research is (What schools teach us)	**What design research really is** (What no one teaches us)
• Plan research activities and recruit users • Conduct research with users to understand their needs • Uncover insights and pain points • Conceptualise solutions and recommendations • Collaborate with multidisciplinary teams • Create design and research artefacts like journey maps, personas and reports • Conduct co-design workshops • Present findings	All of the things in the left column, PLUS: • Stakeholder alignment and expectation management • Project management and product management • Change management, training and communication • Facilitation of difficult conversations • Negotiation between the business and the user • Systems thinking (seeing the forest for the trees) • Avoiding being replaced by robots

Practitioners in the UX and service design space simply aren't trained for all of these extra responsibilities ahead of time, but we're almost always placed at the centre of change, where those responsibilities fall on us. And success in the "real world" depends on handling them well.

When we don't, we prove the nay-sayers right, and we end up spinning our wheels, unable to do the good work and research that leads to change. It's a vicious cycle that's hard to get out of, and it can be enough to burn you out and send you running from the industry into a different career path. (But please, don't run. Trust me.)
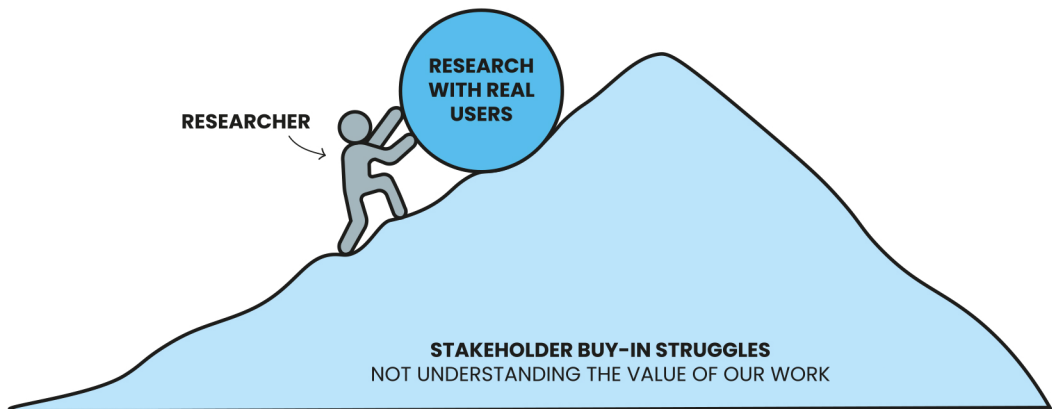
The Mountain That We Have to Climb

Does all of the above seem daunting? Well, it doesn't have to be this way. I'm just one example of the truth in that. If you're persistent and you apply the advice in this book, there are substantial rewards in your future.

Imagine getting approved budgets, resources and time to do the research you're passionate about, and running successful projects end to end with ease and confidence. Imagine captivating executives with your design storytelling and seeing your insights turn into real-life solutions that make a big difference in users' lives. And imagine being invited to talk strategy with executives and facilitate workshops that effect change on the organisation level, eventually becoming a valued leader of research-based design initiatives. It's all possible if you can demonstrate project success and prove the value of what you do.

I didn't start my career serving big-name clients and ushering in digital transformations left and right. Silicon Valley was tough, and starting my own agency was tougher. I weathered that journey with a mix of grit, trial and error, some foundational knowledge from school and a LOT of informal self-education.

I know how frustrating it is to be a designer or researcher out there in the world. It really can feel like you're Sisyphus pushing the rock up the mountain. You struggle to convince your directors and leadership of why you should be allowed to even start your research project, only to have it get cut partway through, because no one sees it as a strategic priority or understands its advantages. Or, you complete the project, but your insights and suggestions are brushed aside, your beautifully designed PDFs are put in a folder where dreams go to die (never to see the light of day again) and your future project proposals are declined. The rock goes up so high, only to start slipping down again.

RESEARCH WITH REAL USERS

RESEARCHER

STAKEHOLDER BUY-IN STRUGGLES
NOT UNDERSTANDING THE VALUE OF OUR WORK

It's important to acknowledge how hard this work can be when you feel like you're the only one trying to make a difference. But hopefully, you keep going. Because there are lots of great ideas out there to discover, and you're not wrong when you look at a product or service and think, "There has to be a better way." The world needs people like you to

keep pushing forward.

With this book, my goal is to lighten the load. I want to empower more practitioners to get where they want to go faster, so you can start to see all those amazing things I listed come true for you... so that you can make experiences better and easier for those around you, and ultimately make the world a better place to live in.

The Secrets to Project Success

Now that we've established the big "why" behind this book, we should address the "how." There's a huge difference between knowing how to run design research projects and knowing how to run *successful* research projects that make an impact. I will help you learn to do the latter.

As you read each chapter, you'll notice sections called "Action Advice" and "Alignment Advice." They're there to help you make the most out of each stage of your project by focusing on what matters to the decision makers.

They're centred around two factors that drive project success:

Action: You'll need to empower your stakeholders to invest in your research in the first place. You'll also need to inspire effective decisions about their products and services by providing them with actionable insights.

Alignment: Gaining alignment with your stakeholders is essential. You'll need their weigh-in and cooperation throughout your research project, so you can ensure that you're delivering on their goals, building trust and managing their expectations.

How to Use This Book

This book is chock full of examples, practical advice, anecdotes from my own experiences, and methodical step-by-step guides for planning, conducting and analysing design research. (Anyone who works in the field of UX or service design should be able to find some nuggets in here, no matter your level of experience.)

I've intended for it to be a dual-purpose book. It should act as:

1. **A manual** for conducting each of the four key design research methods

2. **A success guide** for making an impact in the professional world (by winning over the hearts and minds of the decision makers and stakeholders who can approve, review and act on your research)

You can read this book **cover to cover**, to enrich the work and activities you're already doing, or **as a reference book**, to pick up when you need:

- **Ideas for how to build trust with stakeholders** and engage with them effectively (if you're not seeing movement on your projects)

- **A guide for planning effective research** when you're in the early stages of a project or haven't started yet and you want to make sure you're set up for success

- **Organised end-to-end guidelines** that you can use ad hoc as you move through any phase of a design research project, for detailed research method instructions, checklists and tips

- **A source of inspiration** if you've been doing the same process for too long and want a different perspective

As you read this book, my hope is for you to not only excel at specific design research methods, but also learn when and how to bring stakeholders and project team members on board (and fully appreciate why that's crucial). This will allow you to consistently solve real problems that users have, make their experiences easier or less frustrating, and build a long track record of undeniable successes in influencing high-level decision-making. That's the dream, and it's achievable. I've seen entire Fortune 100 company roadmaps change as a result of successful design research insights!

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*GAINING STAKEHOLDER BUY-IN

Grow Influence and Build Trust

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"Be so good they can't ignore you."
— Steve Martin

Introduction

I couldn't launch into the "how" of conducting successful design research without first talking about stakeholder buy-in. It's not hard to find projects that need research, but it can be very hard to find stakeholders who will actually allow you the time and budget to conduct it. To convince them, you need to become an expert at stakeholder management and championing the "why" behind your research. That's what I'll cover in these next two chapters.

So many designers and researchers I talk to are really passionate about the work — they want to dive right into doing interviews and observations to understand user needs and then get going on conceptualising amazing digital solutions to the problems they uncover. In reality, that eager passion to transform products and services isn't always welcomed with open arms. After all, each organisation has its own ways of working and thinking. Stakeholders might already be convinced that they know all of the pain points without talking to users, or they may have already decided on a new direction for the business. Someone coming in from the outside trying to break that mould by suggesting to do research could easily be sidelined.

So, even though eager researchers just want to do the work they were trained for (i.e. sparking amazing digital transformations), they end up spending a lot of their time convincing people to let them do it. It's an exhausting part of the job, for sure — and it's also necessary.

But you don't have to push that boulder up the mountain alone. I'm going to help you approach it one step at a time. This chapter will teach you the mindset you need and concrete tips on how you can grow your influence, so that you can clear a path for the research you love with less struggle. You should refer to it in tandem with chapter 3, which will walk you through how to communicate the value of your work to the stakeholders that you're planning to sway.

The Circle of Influence

To catalyse innovation through your research, (or to get your research project greenlit in the first place), you need to establish influence in an organisation. The first step in growing that influence is understanding what level of influence you already have, what level of influence is realistic to achieve, and what uncontrollable factors you'll need to deal with along the way.

This concept of a "circle of influence" comes from the book, *The 7 Habits of Highly Effective People,* by Stephen Covey, a well-known American educator, businessman and motivational speaker. While he uses this model to teach readers about personal development, I'll be using it as a framework within the world of design research. The circle of influence is a great tool for reframing your perspective when you're trying to get more support for design research because it reminds you to take a step back and look at the bigger picture. It can also lessen the frustration that comes along with constantly convincing people that your work has value and purpose.

Covey's model is broken down into three circles: your circle of control, your circle of influence and your circle of concern. I'll explain what each circle represents within a UX or design research context.

STEPHEN COVEY'S CIRCLE OF INFLUENCE

CIRCLE OF INFLUENCE

The circle of influence describes the factors that we can do something about, or indirectly control to an extent. As you gain influence in an organisation, you have the potential to affect more things.

Your circle of influence could include:

- Your team
- The projects you work on
- UX processes and practices used in your team
- Your organisation's understanding of design and research
- The stakeholders you interact with
- Your client or organisation's products and services
- User and customer experience
- Aspects of company culture

CIRCLE OF CONCERN

Wide range of concerns and no control
The circle of concern contains the factors in an organisation that you have no control over.

Your circle of concern could include:

- Your organisation's values
- Their benefit and healthcare programs
- Their leadership team
- Their financial circumstances (layoffs, budget cuts, etc.)
- The behaviour, thoughts and feelings of those around you

CIRCLE OF CONTROL

What we can directly control
The circle of control refers to the factors that are in your direct control as an individual within the organisation.

Your circle of control could include:

- The quality of your work and deliverables
- How you choose to react to what others do and say
- Your knowledge of human-centred design
- The thoughts and feelings you have about your work and working relationships