NEEDFINDING SESSION HANDBOOK

FINNISH VERSION AVAILABLE!

Aalto University
Design Factory

INTRODUCTION

This handbook with templates guides you through a 2-hour needfinding planning session, step by step.

We've chosen a few of the methods we love, but feel free to customize your session with any stakeholder mapping and user data collection methods you would like to use. Similarly, if you're doing this for the first time, you might want to reserve an extra hour to have more time to dig into each step.

WHY?

Needfinding is a great way to get a deeper understanding of the needs and motivations of your target stakeholders. While we often assume we know what people need, most new products, startups and organizational change efforts fail due to insufficient understanding of the needs of different users and stakeholders. A deep understanding comes from empathizing with stakeholders' motivations that drive their behaviors. While desk research and surveys are valuable tools to get a general lay of the land, engaging directly with stakeholders supports building that necessary emotional connection and understanding.

FOR WHOM?

These tools are created for anyone who wants to collect better user insights and are free to use.

We recommend that each needfinding planning session has a facilitator who focuses on running the session rather than producing ideas. This is particularly important if multiple teams take part in the same session. This handbook guides you through what to do.

However, you can still use this toolkit if everybody wants to participate in the needfinding planning without anybody taking the role of facilitator. If this is the case, review the cheat sheet and consider reviewing the handbook, too, with the entire team participating in the session. Using a timer can also be a helpful way to manage the activities. Combined, these tools can help the team move along when everybody gets too absorbed in the tasks.

BEFORE THE SESSION

1

READ THROUGH THIS FACILITATOR GUIDE TO ORGANIZING A FRAMING SESSION

2

INVITE PEOPLE TO THE NEEDFINDING SESSION

Consider inviting a diverse group of people, such as a design team, production staff, salespeople and customers – more diverse participants produce more diverse perspectives.

- A good group size is 3-6 people, but you can have several groups in one framing session. Aim for diversity in each group.
- If you want to take part in the tasks, could you invite a colleague to facilitate the session?

Explain the goal and outcome of the session to set clear expectations.

Typical goals:
- Kickstart a project: identify design opportunities by understanding current practices and needs.
- Advance an ongoing project: understand better what motivates behavior in relation to your solution idea.

Explain why the invitees' presence would be valued and important for the goal.

3

PREPARE THE MATERIALS YOU'LL NEED FOR THE SESSION

Prepare a short welcoming speech or presentation. Introduce the topic you want to explore and ways of working (more about this on Introduction, page 6).

Physical needfinding materials: printouts of the templates, pens, sticky notes, flip chart paper/ whiteboard, background instrumental music and refreshments, and a camera to capture creations. (remember to ask permission when taking photos to make sure everyone is comfortable with what is being captured!).

Digital needfinding materials: use the Miro templates to see and edit sticky notes with all team members simultaneously.

- If you use digital platforms, ensure all your invitees are familiar with them! If not, send a small tutorial and/or a signup link so the session will run smoothly.

DURING THE SESSION

THIS SESSION IS ORGANISED INTO FOUR STEPS:

1

First, we lay the groundwork for a good session by **setting the stage**: setting expectations and looking into the issue for which we will plan needfinding.

2

Second, we **map the stakeholders,** starting with guided brainwriting and organizing them on a framework. We consider stakeholders disproportionately impacted by the issue because their intensified needs are more likely to benefit all stakeholders.

3

Third, we **develop the needfinding interview plan** by defining the target stakeholders and the purpose.

4

Finally, we **practice the needfinding interview** to ensure we ask the right questions when engaging with our target stakeholders.

ENJOY NEEDFINDING!

SETTING THE STAGE

INTRODUCTION

WELCOME TO THE SESSION!

1

INTRODUCE THE ISSUE YOU WANT TO COLLECT NEEDFINDING DATA FOR

Why is this an important, meaningful or timely challenge or opportunity?

- For example, is this tied to your strategy? Have you gotten feedback about this issue? Why do you believe this is an issue worth investigating?
- What would solving this enable? Whose life would be improved?

What do we already know about the challenge/opportunity?

- If you already have related research results, such as market surveys, needfinding interviews, or benchmarking, now is a good time to share a few highlights.
- What are the key constraints around the issue? Open exploration is encouraged, but it's good to stay focused.

Remind of the goal of the day
(already shared in invitations)

2

INTRODUCE THE WAYS OF WORKING

Take a learner's mindset. Today is about creating a plan to uncover people's desires or motivations for behaviors and experiences. And for that purpose we will build a safe space, which means not making assumptions and not projecting our own experiences but remaining open to various responses. Thinking like designers, we need to wonder what somebody is doing, how they are doing this, why this way, how it makes them feel, why it makes them feel this way, what else is influencing this moment, etc.

This does not mean we will take what stakeholders say at face value. Often, what people say they want is not what they actually need. However, their statements reflect real underlying needs, which we can uncover by digging deeper and asking 'why' they want something.

10 min

WHY ARE WE DOING THIS?

Motivation hinges on seeing the value of what we are trying to do. This section clarifies why participation in this session matters and why exploring different frames matters.

Sharing the ways of working sets the tone of the session and can help reduce fixation (getting stuck in one direction) and self-censorship (holding back ideas).

materials:

Welcome speech / presentation

WHO'S AT THE TABLE

5 min

IF THE PARTICIPANTS DON'T KNOW EACH OTHER, HAVE EVERYONE INTRODUCE THEMSELVES TO ONE ANOTHER IN THE GROUP

You can also ask everyone to share an experience or how they are connected to the issue.

- Remember that some people may not feel comfortable sharing certain comments or their personal thoughts. This is perfectly fine! Just create a safe space for people to share what they feel comfortable saying in the group. People tend to open a bit more when they settle into the session and the discussion gets going.
- Consider including an ice-breaker in the introduction (such as: what is your spiritual animal, or select a word that describes you the most, among others) to set the tone and safe space for the participants.

In a face-to-face session where the participants don't know each other, we recommend making first-name name tags.

TIP!

If you do not have a separate facilitator, assign a timekeeper in the group and share the cheat sheet with the group at this phase!

WHY ARE WE DOING THIS?

Psychological safety is needed for people to freely share their thoughts and ideas – having names and real people behind the names makes it easier!

materials:

If participants are divided into several groups, prepare team tables or breakout rooms.

Name tags if needed

ALIGNING EXPECTATIONS

10 min

1

REFLECT

For 5 minutes, individually reflect on your experiences relative to the needs you will be exploring.

- Firstly, reflect on what experiences you can leverage. What first-hand or second-hand experiences have you had with this issue? Additionally, do you have any connections, interview experiences, or similar that might support you in the needfinding phase?
- Secondly, reflect on your expectations or hopes. What excites you about this needfinding? Is it curiosity about the stakeholders, relevance of the issue, learning about the process, or something else?

2

SHARING

Take one minute each to state what you think you can leverage, what you bring to the table, and your expectations or hopes.

- Ask for clarification if anything is unclear, but don't challenge somebody's potential contributions or expectations.
- Knowing people's contributions, discuss briefly if there is anything you should be alert for as a team. For example, you are in new territory if nobody has ever conducted a user interview. That is exciting, but engaging somebody with experience here can be worthwhile.

WHY ARE WE DOING THIS?

By stating our potential contributions and expectations, we create a shared understanding of how we perceive the issue. As such, it supports aligning expectations and identifying any knowledge gaps.

Additionally, this contributes to psychological safety by establishing a better understanding of where people are coming from. Don't worry about agreeing on every detail at this stage; this is primarily intended to get all noses pointed in the same direction.

MAPPING STAKEHOLDERS

BRAINWRITING 30 STAKEHOLDERS

20 min

!

Individually, write down stakeholders (people, groups, organizations) relevant to your chosen issue, each on a separate sticky note without sharing with your group members, using the provided Stakeholder template. You have five minutes for each round.

1. Make each stakeholder specific. So not 'customers', but a specific customer segment, such as 'busy working singles on a budget', and not just 'managers', but 'new managers in the R&D unit'.
2. There is no need to keep track of which category the stakeholders belong to, but aim to identify at least two stakeholders in each question.

WHY ARE WE DOING THIS?

Often, people assume they know the most important stakeholder. Each stakeholder has different hopes and expectations for which we can design. Even though in design processes, we tend to start small and design for a specific group of stakeholders, it is important to make conscious and mindful decisions about who you are including or excluding for a first iteration so that you can return to them later – because their interactions and experiences will also influence your target stakeholders' experience. Considering extreme users and marginalised groups increases the likeliness your solutions will fit a wider range of users.

On the other hand, individual brainwriting is an efficient way of quickly ideating many stakeholders while providing space to get equal input from all session participants.

materials:

Stakeholder Brainwriting Template

Post-its, pens

MAPPING SUPPORTING STAKEHOLDERS

25 min

1

PLACE EACH STAKEHOLDER IN THE FRAMEWORK

In 15 minutes, review all the stakeholders you wrote down in the previous exercise as a group and place them on the axis diagram.

- Place the Supporting Stakeholders Map template on a flipchart paper or whiteboard and extend the axes to have enough space for all sticky notes.
- Take turns adding one of your identified stakeholders to the map. Briefly explain or discuss the position.
- There is no exact, correct place to put each stakeholder. Rather, this is a way of identifying, challenging, and aligning your assumptions across the team and indicating the stakeholders' relative positions towards one another.
- You can remove any double stakeholders, add more stakeholders, or split some broad stakeholder groups into more specific ones.

2

REVIEW OPPORTUNITIES FOR ENGAGING WITH THE STAKEHOLDER GROUPS

Each of the quadrants corresponds to how much effort or support you can expect from stakeholders in them (see the next page: *Supporting Stakeholder Map*). Review the quadrants and discuss who you might want to, need to, and be able to engage with.

You don't need to yet come to an agreement and no project will be able to consider everything. Rather, this serves as a starting point for considering your options for needfinding.

TIP!

While asking a generative AI Large Language Model (LLM) to generate a list of relevant stakeholders might be tempting, writing them down and discussing them as a team allows you to become aware of your assumptions and potential blind spots. Instead, consider asking an LLM to provide more stakeholders after brainstorming to check if you have missed any and reflect on why you might have missed them.

WHY ARE WE DOING THIS?

Discussing individually brainstormed stakeholders within the team reveals individual angles and supports aligning expectations across the team. Additionally, this enhances our understanding of the bigger picture, how different stakeholders might be impacted by any change we introduce, and which stakeholders we need to get on board. We cannot engage with everybody from the start. Considering who might be most useful to engage with at various stages of the design process helps us plan and make conscious decisions about who we include or exclude – for now.

materials:

Flipchart paper or whiteboard
Markers
Post-its, pens
Supporting Stakeholder Map

MAPPING SUPPORTING STAKEHOLDERS

ENTHUSIASTIC ABOUT THE CHANGE EFFORT

Potential change agents

could become ambassadors of your project or concept. Consider talking to change agents if you feel good about your idea but need more buy-in or if you need help advocating for your project.

Potential codesigners

could help generate more ideas and elaborate ideas through testing. They are likely to help improve your idea but less likely to advocate on your behalf. Consider talking to codesigners if you would like to explore new solution directions or are unsure your solution fully tackles the identified issue.

DISSATISFIED ABOUT THE CURRENT SITUATION

SATISFIED ABOUT THE CURRENT SITUATION

Potential informants

could help you better understand present issues. They are likely to be willing to share their concerns but less likely to participate in supporting your change effort. Consider talking to informants if you are unsure you are targeting the right issue or would like to increase your understanding of different needs.

Potential skeptics

can be more difficult to motivate, but you might still need their support or buy-in. If that's the case, you could think about how you could demonstrate the effects of the issue you're trying to tackle or the benefits of a solution you've developed to build enthusiasm. Consider inviting skeptics to demonstrations and sharing insights or results gained together with change agents, codesigners, or informants.

NOT ENTHUSIASTIC ABOUT THE CHANGE EFFORT

BREAK

This is a good time for a short coffee break to refresh yourself before the final work stages!

SCOPING A NEEDFINDING INTERVIEW

DECIDING ON TARGET STAKEHOLDERS

10 min

1

INSIGHTS VERSUS ACCESSIBILITY

For 5 minutes, revisit the stakeholder map as a team and discuss whose needs you want to understand better at this stage through interviews, balancing value and accessibility.

- Whose perspectives would be particularly valuable at this stage of the project? Somebody who is disproportionately impacted might yield the most meaningful results. Consider people with different backgrounds, abilities, or demographics since their perspectives are more likely to differ from yours.
- How likely are you to reach these stakeholders? Ideally, needfinding interviews are conducted face-to-face in the context where the issue occurs to facilitate recall of earlier experiences.
- We typically recommend starting out with one of the identified user groups, unless you already have solid user insights and are now looking to better understand how to get others onboard the change effort.

2

STAKEHOLDER DESCRIPTION

In 5 minutes, decide one stakeholder group you wish to engage with first and add this to the template.

- Describe your target stakeholder group in detail. Check that this group is specific enough (for example, rather than "users" or "customers", what type of users are you focusing on).
- Discuss how many stakeholders you intend to interview and what type of engagement you think is best. For example, how will you find and reach out to them? Will you be conducting interviews face-to-face or remotely?

TIP!

As a rule of thumb, five interviews can be sufficient to yield interesting insights. The aim is to go for high-quality data rather than quantity. Think of it as a first pass of gathering insights to inform your next steps rather than finding definitive answers!

WHY ARE WE DOING THIS?

Easy-to-reach people are more likely to be similar to you, increasing the likelihood that they will confirm your thinking rather than challenge it with new perspectives. To maximize learning, balance venturing out of your comfort zone and stakeholder accessibility.

materials:

User Interview Template

DEFINING INTERVIEW PURPOSE AND GOALS

10 min

1

PURPOSE

For 5 minutes as a group, discuss why conducting interviews with these stakeholders is meaningful guided by the questions below.

As you discuss, formulate a clear and specific research purpose starting with "We want to understand why …" including a description of the target stakeholder, the undesired behavior or experience, and the envisioned learnings from your needfinding interview. Add this to the template.

- What do you need to learn more about before continuing? This can include identifying pain points in an experience, understanding contextual influences, evaluating effectiveness or perceptions of current features, or digging deeper into underlying motivations. Try to be as specific as possible.
- What decisions will this research enable? In other words, what do you intend to do after engaging with a few stakeholders?
- Why and how can your chosen target stakeholders help you learn about this? At this point, you can still specify, broaden, or change your target stakeholders.

2

GOALS

For 5 minutes as a group, formulate two or three questions you want answered through needfinding interviews.

- These are questions for you - not the ones you ask your target stakeholders. Make the questions as specific, actionable, and practical. Add these to the template.

TIP!

Generally, 30-45 minutes is sufficient to build rapport, discuss activities, and dig deeper into underlying motivations. However, even just 5-10 minutes can already be sufficient to reveal new perspectives. Consider whether your target stakeholders would appreciate a short or long conversation and how easy it will be to build rapport.

WHY ARE WE DOING THIS?

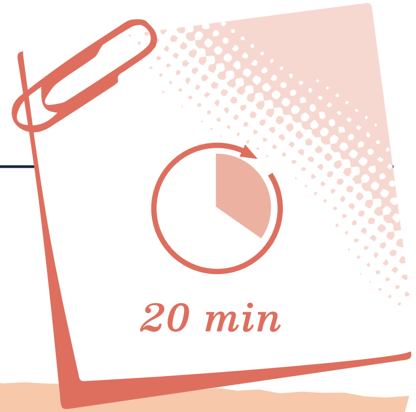
People often conduct interviews with easy-to-reach people without considering whose perspectives are more valuable. While being pragmatic is necessary, easy-to-reach people are more likely to be similar to you, increasing the likelihood that they will confirm your thinking rather than challenge it with new perspectives. To avoid wasting time and maximize learning, balance venturing out of your comfort zone and considering stakeholder accessibility.

materials:

User Interview Template

PREPARING A NEEDFINDING INTERVIEW

PREPARE AN INTERVIEW GUIDE



FILL OUT THE TEMPLATE AND DETAIL THE STAKEHOLDER ENGAGEMENT.

1

INTRODUCTION

In 3 minutes, decide with the team how you will introduce the interview.

- Start by introducing yourself and the purpose of the interview.
- Clarify the context for whom you are conducting the interview.
- Ensure participants understand what questions you will ask and how long the interview will take.
- Lastly, let people know how you record the data (e.g., note taking, audio recording) and if needed, get informed consent. (Consult local regulations around data privacy and ethics.)
- Some of this can also already happen in an email invitation

2

WARM-UP QUESTIONS

In 5 minutes, formulate some warm-up questions with the team.

Warm-up questions should be related to the topic but simple and without assumptions to give interviewees a feeling of "I've got this".

Ask about relevant factual descriptions, such as the frequency of product or service use, steps of an experience, physical surroundings, or job role and responsibilities. Don't discuss deeply emotional experiences or motivations just yet.

Steps 3 and 4 on the following page.

TIP!

Leave room for silence in interviews. If interviewees don't answer immediately, give them time to process the question before rephrasing or clarifying. Similarly, when participants have given their answers, don't move to the next question too fast. Waiting for about 5 seconds allows interviewees to add more.

PREPARE AN INTERVIEW GUIDE

3

SUBSTANTIVE QUESTIONS

In 10 minutes, formulate gradually more specific questions with the team.

Keep questions open and don't ask for validation of your assumptions. Since we want to understand the problem space, it is best to ask about past experiences instead of potential solutions or improvements.

For example, ask participants to describe a situation or experience in detail. People generally recall extreme moments more easily and vividly, so asking for great and horrible experiences can be helpful.

Follow-up questions can target the intricacies, for example, in the form of:

- How exactly did you do something?
- What motivated you to do something?
- Who or what else was there?
- How did something make you feel?
- Why did something make you feel a certain way?

4

CLOSING

In 2 minutes, decide on a nice closing with the team. Allow sufficient time to ask participants if there is anything they would like to add. Wrap the session up by thanking the participants for their time and input. When the interview is officially over, ask participants if they have any questions for you about the project.

WHY ARE WE DOING THIS?

Creating an interview guide keeps you on track even if you need to make changes during the interview. Additionally, it reduces bias and ensures you ask all participants the same types of questions. Lastly, it helps assess the required time better.

materials:

User interview Template

WRAP-UP

10 min

SHARE YOUR NEXT STEPS WITH THE NEEDFINDING PLANNING SESSION PARTICIPANTS:

1

GET READY TO GO INTO THE FIELD

Divide roles and who will interview whom (or plan a pilot - see the bonus activity on the next page).

Aim for a few yet rich interviews. The aim is not to have a large number of interviews but rather to gain a deeper understanding of underlying motivations for their experiences.

- As you conduct your interviews, take as many notes as you can. It is hard to know beforehand what patterns will emerge.

TIP!

If you can't audio or video record the interview, pair up so that one of you can focus on the conversation and the other on note taking.

2

WHAT HAPPENS TO THE INTERVIEW PLANS NOW?

Will you share them with the participants and/or with someone else? How?

- If you have more than one group in the session and you can reserve more than 2 hrs, it's a good idea to have groups share one-minute pitches of their final interview guides immediately with everyone in the session.

3

KEEPING CONTACT

Agree on how to stay in touch and when you will meet again to discuss the progress and decide on further steps.

How will your development effort proceed? What's the next step in your project? Will the needfinding planning session participants hear from you again later in the process?

WHY ARE WE DOING THIS?

A sense of progress is the best predictor of subsequent development motivation, so you want to make sure everyone knows what their efforts have contributed towards.

THANK THE PARTICIPANTS FOR THEIR TIME AND INSIGHTS.

BEFORE GOING INTO THE FIELD (BONUS)

!

PILOT THE INTERVIEW GUIDE

If you have time, practice your interview guide with a friend or colleague unfamiliar with your research topic to test whether everything is clear and the questions yield the responses you hoped for.

- Identify somebody willing to give honest feedback. If this is somebody who is part of the targeted stakeholder group, that can also work, but make sure to tell them this is a pilot and you would like feedback on the interview itself as well.
- Go in pairs so one person can take the lead in interviewing while the other takes notes. Take notes of any moments of confusion, too much guidance, or unexpected responses.
- Ideally, identify a second person and switch roles so you can learn from both doing and observing. Share notes and observations and update your interview guide.

WHY ARE WE DOING THIS?

Testing your interview skills can be important, especially when you are new to interviewing. Pay special attention to not interrupting the interviewee and making assumptions. However, even experienced interviewers benefit from a pilot to improve the flow, framing of questions, and identifying bias.

AFTER THE SESSION

AFTER THE SESSION

1

IMMEDIATELY AFTER THE SESSION ENDS

Take photos of produced stakeholder maps and needfinding interview templates or save digital files to ensure you can later return to all of the great ideas produced in the session.

Overviews are enough for other steps, but for the final interview guide, you might want to add notes on anything else you remember related to them from your group discussions.

2

SOON AFTER THE NEEDFINDING SESSION

With permission from the participants, summarize the session's results and share the guide documented in more detail with at least all of the session's participants.

Also, consider who else might benefit from hearing about these potential needfinding directions.

Someone in your organization working on similar issues who could use the inspiration? Communicating progress to project management and leadership? Offering sneak peeks behind the scenes to your customers or collaborators?

Ensure you have the participants' permission to share anything that might identify them.

3

LATER ON

Try to follow up with your session participants. Since the session, what have you already done with the needfinding, and what are you working on now?

It's always nice to see what results from initial efforts, and it will be easier to get people excited about taking part the next time around when you show the progress you've made.

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QUESTIONS?

Don’t hesitate to get in touch with us!
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