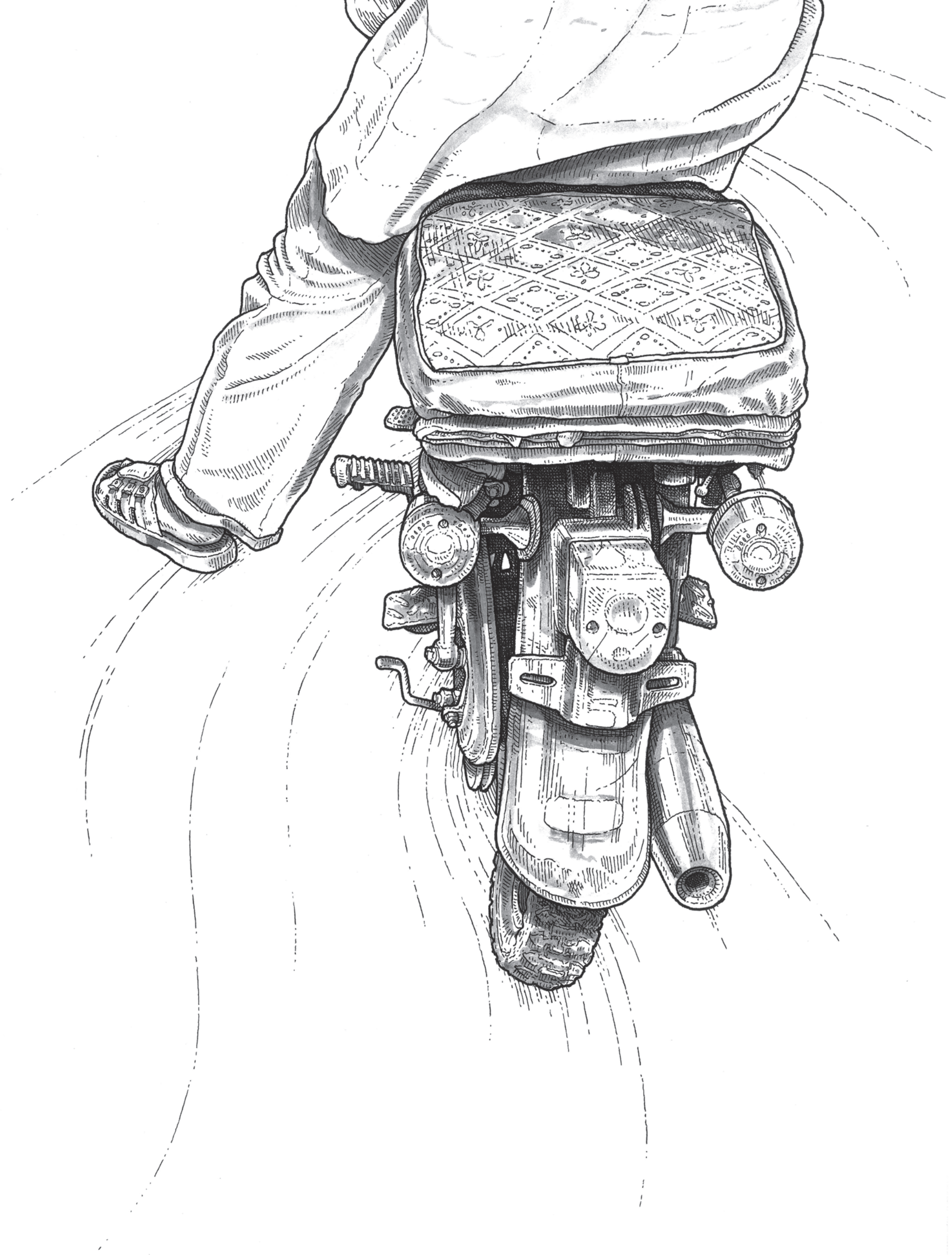

The Field Study Handbook

Chapter 18: Sharing

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Sharing

The research is complete. The team has delivered its field study report and other assets. Stakeholders have been engaged, insights shared, conversations had. By the narrow definition of the Statement of Work, the project is over—or is it?

This chapter also draws on a wide spectrum of commercial and non-commercial project deliverables. It spans writing articles for, and the research appearing in media such as *The New York Times*, *The Economist*, *Die Zeit*, and *The Wall Street Journal*, through to self-publishing platforms such as social media. It includes the preparation and delivery of presentations, from lecture theatres to boardrooms, numerous product launches, and strategy decisions.

The art of sharing
To understand the impact research can have requires an appreciation of how content ebbs and flows in an organisation, how ideas are passed from person to person and adopted, and how institutions internalise information, politics, and an acute sense of—wait for it—timing. A well-thought-out sharing process recognises the work of the team and is framed by the sharer. Poorly thought-out sharing marginalises team members and partners, building resentment that lives long after the project is completed.

This chapter delves into the art of sharing for impact.

Why We Share
Research is shared to evangelise a point of view. It positions the individual, team, and organisation as thought leaders, and primes the audience for what is to come. The primary advantage of thought leadership is not, as many observers believe, the elevated status of the sharer, but rather that it attracts conversations from a nascent community. Which, in turn, makes the work of staying at the forefront of that domain that much easier. A community amplifies effort.

The organisational reasons we share are usually aligned to a strategy, but there's something far more interesting and primordial at play.

The role of storytelling
Social interaction is fundamental to our well-being and happiness as human beings. Relationships formed through social interaction provide the space for us to move beyond mere survival, to grow and develop, to build a social safety net that will see us through adverse times.

Storytelling helps bring people together as a way to socially interact, and provides a shared understanding of the world and how people can live within it. It gives us a common sense of purpose. A great story has the power to captivate and inspire. It cements the storyteller within that world as the person who passes on knowledge and wisdom, to increase the collective resilience of, and thereby become indispensable to, her tribe.

The art of storytelling
We've all heard both stories that have affected us intellectually and emotionally and others that have fallen flat. So what makes for a great story?

In "The Four Truths of the Storyteller" (Harvard Business Review, 2007), Peter Guber argues that people are most moved and captivated by stories that reflect honest and openly communicated values and are true to the teller, the audience (who walk away with a story worth owning), the moment (which makes the story spontaneously different every time it is narrated), and the mission, in that the storyteller is devoted to a cause greater than herself.

The story needs to whet the audience's appetite for what's to follow, and deliver on the promise through emotional fulfilment. For the story to be successful, it needs to make the audience take ownership—to retell it, in their own terms, while retaining its mission. It may seem contradictory, but intense preparation for, and a deep understanding of, the material being shared supports spontaneity, allowing the researcher to ad-lib with confidence.

The researcher as corporate storyteller
Just as the field researcher figures out how to add value to her organisation, the organisation learns how to make use of field research.

At the turn of the twenty-first century, the typical publishing avenue for corporate researchers was to write for formal peer-reviewed journals and speak at a narrow band of conferences. Where appropriate, they would also file patents for concepts that were generated and explored at those conferences. Department heads would vet the validity of content, the communications department would oversee all things destined for

Levels of confidentiality
There are four broad categories of corporate confidentiality:

Public
Cleared for sharing in the public domain

Confidential
The default for most internal documents, including corporate research

Confidential Partner
A cleaned-up version of the confidential material for sharing with partners under NDA

Secret
Shared to a limited, named (usually) internal group, such as executive staff or a product team. For example, projects that identify a significant new opportunity or an existential threat

external consumption, and the legal department would take a pass to ensure nothing of significant commercial value they wanted to prevent competitors from having access to was released into the public domain.

The corporation as storyteller

The need for corporate storytellers and storytelling has remained constant over time.

The act of storytelling increases the likelihood that the tribe (their department, their business unit, the corporation) will survive. As corporations grow, so does the infrastructure that allows them to systematically tell their stories. The role of marketing, branding, and communications in this process is obvious. However, the most effective stories are told through the experiences of using a great product. Part of what makes that product great is understanding the story of how it came into being.

How storytelling evolves

While the foundation of a great story remains constant, the mechanisms through which stories are told continue to evolve.

For example, discoverability, the persistent record of strong and weak social ties, the medium through which stories are shared—all are different today compared to a century ago. A story documented online remains told, searchable, and quotable until that moment it's lost to the search algorithms of the day, or to a change in storage formats. The irony is that tangible objects—perceived as ephemeral and awkward to store, access, and share at scale—are often more resilient than their digital counterparts.

A complete story can be told in person or can reveal itself through multiple touchpoints—a clothes tag, something that leads to a website, something that brings people together in a room, a product becoming the backdrop to someone's next adventure. The storyteller's spatial awareness of what is happening at each touchpoint impacts how and when the story is delivered.

The evolution of storytelling is also impacted by privacy norms. The tension between our public and private selves is constant, but the way in which this tension is expressed has shifted over time. For example, the connective tissue between the researcher as storyteller and people (including participants) who appear in the story persists long after the study is over. It's one thing to adapt a story to an audience. It's another for the audience to be able to communicate with the subject of the story while the story is being told. The sharing norms can change between the time the data was collected and the time it is scheduled to be shared, such is the speed at which adoption and use occurs.

Much has been made of artificial intelligence (AI) predicting what we want to consume in order to deliver it before we realise we want it. My own benchmark of whether AI-driven storytelling is successful isn't focused on whether it's an engaging read, results in sales, or has low return rates for products that predictively are placed in your wardrobe. Rather, it's whether the AI is able to read the mood in a room and develop a stand-up comedian's acute sense of timing of what to say when. As AI evolves (and our ability to define what AI is and isn't—much is up for debate), we will spend more time ascertaining whether the storyteller and/or the audience is human and in a position to act on what is delivered. Great stories will be told, absorbed by an attentive audience, their intents realised, without humans ever being in the loop.

The researcher and team as protagonist

The researcher is in a prime position to be the protagonist in the journey of discovery. What are the pros and cons of the story told through her eyes?

The primary benefit is authenticity, that the story is more believable because of a nuanced understanding of context that transports the audience to that time and place. The risk is that, by sharing something, the researcher may be perceived by the client or her own organisation to be sharing everything—that she places her own trajectory above that of the client, the project and team, and her professional duty to the organisation. Elevating one member of the team to tell the story invariably marginalises others. When the researcher is the protagonist, the team risks becoming a footnote.

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The four P's of sharing

The trick to understanding the value of data and insights generated by the project lies in the four P's:

- Provide the correct data, information, and insight
- Packaged into the ideal format
- Presented to the right person
- At just the right Point

The correct data and format are fairly straightforward. The right person is obvious within the confines of the project, but requires ongoing attention to understand access over time.

How the questions evolve

The questions asked prior to the start of the field research are, by their very nature, crude attempts at articulating the unknown. A well-run project delivers smarter questions and a shared understanding of what makes them smarter. To be successful, the project must share this wisdom beyond the team and into the organisation.

Some projects go a step further and challenge the starting hypothesis for the project. For example, a particular project was initiated on the assumption that it needed to solve the issue of designing for *illiteracy*, but turned out to be more about understanding *competency*, or what is required to complete a specific task. This may seem like a subtle distinction, but very different outcomes are possible through each, resulting in very different investments of tens of millions of dollars.

Only a few people stand at the forefront of any given domain. The rest of us are playing catch up. What does it mean when every question you ever asked in your lifetime is out there, queryable, if only you or someone else knows what to ask? It's tempting to think that field research doesn't have a role to play when the analytics of prior field research are there just waiting to be mined, for far less effort than going in-field.

Numerous companies offer remote data collection from "scouts", who then aggregate and extrapolate insight from the data. But they typically fall well short of delivering on their promises. Moreover, these companies provide confidence in what they measure, despite little or no awareness that they are measuring the wrong thing. Our ability to make sense of, prioritise, or discard data, observations, and insight is highly dependent on understanding the context in which those questions are being asked, as well as the strengths and weakness of the methods used. Remote research therefore, becomes a slightly more valid option, when the remote researcher has previously visited that locale.

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How stories evolve

While the truths within good stories remain constant, the ways in which we tell them—and how they are consumed—change over time.

For example, through connectivity and persistent identity, the distance between the source of data and the audience of the report in which the data appears has been effectively closed entirely. It's possible to direct follow-up questions to participants at that very moment the report content is being consumed, whenever and wherever that may be. The age of a communication department taking a participant's comments or situation out of context, and expecting not to be called out for it, is over.

While technological constraints to make this happen are fading away, social norms and business models dictate whether direct contact or other forms of indirect visibility of a participant by the audience are appropriate and, unmediated by the researcher or her organisation. Access is—and always will be—a meaningful control point.

How the audience evolves

The story changes when the audience is able to cross-reference, fact-check, and annotate what's shared. Literacy also plays a part. An audience that has ready access to the world's written libraries and movie and audio archives has different cultural anchors and expectations than one that does not.

Scarcity is as valuable a constraint in storytelling as elsewhere. For example, over time, the technological bottleneck with photography in field research has shifted from access to a film processing lab to simply being able to afford memory cards to the processing power to import high volumes of photos to the cost of retrieving data to the opportunity cost of consuming photos versus other, readily available media.

The first time a client reads a field study report, there is the wonder of seeing the world through fresh eyes. The second time, there is the wisdom of knowing what it will take to apply that insight to the challenge at hand. To remain true to the moment, how we tell stories evolves as a reflection of the changes around us. Great stories take it a step further and instigate that change.

Myths

A myth is a story shaken free of its origins through retelling and time.

Myths exist for many reasons. By peeling back layers of the truth, the researcher is both the myth slayer and the myth maker. The able researcher knows how to generate myths, why they exist, their likely impact, when they should be challenged, and when they should be left to roam free. Myths can have a positive or a negative impact on the researcher, the project, and the organisation.

Personal myths

The story of the researcher-as-adventurer, whose journey is to seek the truth, sustains many projects. It's easy for elements of that journey, for the sake of storytelling, to take on a myth-like significance that stretches and distorts the truth. Trivial moments are elevated to matters of life and death. Some anecdotes share well, but in reality, had little real impact on the project. Propagating these myths has a short-term benefit—to attract attention—but risks the myths themselves being taken as embellishment, which then undermines the objective nature of the deliverables. The client will ask, "If the researcher will exaggerate this, what else will she exaggerate?"

At the other end of the spectrum is the myth of the lazy researcher—someone who has managed to wrangle a business trip somewhere exotic just to have good time on the organisation's dime. This perception is exacerbated by the nature of how much people share through social media, presenting their lives and actions in an overwhelmingly positive light. Photos of three days of decompression in a swanky hotel do not offset the month in the trenches when the audience only sees the latter. Dampen this natural tendency, especially amongst younger team members, to overenthuse.

These myths attract talent to future projects, drawing people to research for reasons that have little to do with the need of a project. Both require extra filters during the recruiting process.

Field research is, by its very nature, an upstream activity in that it sets a direction for the project that becomes apparent—many months or years later—in decisions rationalised and inspired by the research. The temptation is there to take ownership of everything downstream. Yet anyone who has brought an idea to market knows how many minds will mould it along the way. The myth of the idea going straight to market is propagated by consultancies wanting to pitch a clean story of innovation—that their research leads directly to good ideas that, in turn, lead to successful products. It's a useful lie—but the truth is far more interesting.

If a client or colleague takes ownership of an idea born from the project, then the researcher's job is partially complete. She can move on to

If a client or colleague takes ownership of an idea born from the project, then the researcher's job is partially complete answering the next question— before anyone has realised the limits of her own understanding. The perceived ownership of ideas can be intensely personal, and can play out over the course of a career. Your own career may be sustained because you chose to let go of an idea rather than seeking to take credit for it.

Project myths

Myths about the project that are retold within the organisation serve a useful purpose in that they further bond the team, allowing them to be more effective as a team after they go their own ways. The easiest way to build a positive project myth is to undershare and overdeliver.

Teams that fail to deliver disintegrate when the project ends. In politicised organisations—and let's face it, most medium to large organisations are highly politicised—the celebration of failure is largely driven by personal agendas.

Organisational myths

Myths are so central to the sustainability of large organisations that most corporations hire professionals to manage and propagate them. A savvy communications team knows how to build on these myths by positioning, sanctioning, leaking, denying, and retelling them until they take on their desired properties. For example, in a small, rapidly growing company, the founder's myth helps attract and focus talent. In a large, globally distributed corporation, the same type of myths are used to generate and sustain corporate values.

The greatest research myth is that, simply by being in-field, the voice of the user will be heard, and insights will reveal themselves to the researcher and point the way. The reality is it takes experience—and considerable effort—to figure out what's interesting and why, with no guarantee of success. A truly great field researcher can make the process look effortless. But her economy of movement belies the impact that the lightest of touches—at the exact moment in time and place—can make to the direction of a project.

How we evolve

To be true to the teller, the story needs to reflect the researcher's own evolution. Starting out in her career, the researcher feels out what topics are interesting to research and why. A lack of credibility can be bridged by working with an established brand, be it a specific agency or person. Her job title reinforces her credibility to others and, in many instances, to herself. "Principal scientist", "design researcher II", "concept designer", "senior engineer", "ethnographer, "strategy director", "head of product", "founder"—each job title comes with different expectations and assumptions. In countries with high labour mobility and relatively weak social ties, such as the US, professional associations are sought out and proudly displayed. A story told at the beginning of a career has an authenticity afforded by fresh eyes.

Consider the example of researcher Olga Morawczynski, who wrote her doctoral thesis on M-Pesa—which, in a short space of time, moved from fledgeling start-up to become the most successfully adopted money transfer service in the world. Her choice of what research topic to focus on, the timing of that choice, the rapid success of M-Pesa when so many other services were failing, and her ability to capture and publish the essence of that service in her research significantly changed her career trajectory and the opportunities that come from having valuable insight into a particular moment in time.

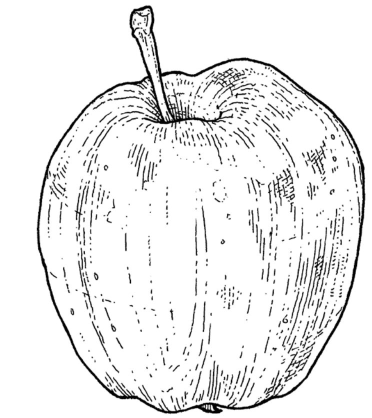
Not everyone can be an Olga. Many researchers remain in the wilderness their whole career, either waiting for the rest of the world to wake up to the importance of their passion or enjoying the solitude of operating at the edges.

Over time, the researcher becomes associated with a domain of inquiry and a style of research—with public presentations, published articles, and social media streams all contributing to a body of work. Wide eyes narrow their focus as the depth of understanding builds and perspectives are formed. The reputation of the teller changes the story that is told.

How I evolved

Early on in my career, I had a number of lucky breaks. The first was joining a concept design team at a cell phone manufacturer a few years prior to personal communications technology becoming globally mainstream (and as one of over fifty thousand employees, contributing in a small way to that success). The second was my inability to write more formal journal articles—or as I defensively put it at the time, "to shoe horn life into lifeless submission formats". I didn't (and still don't) have the discipline to think in the same way the journal founders set out in their submission guidelines. I did, however, find a workaround in self-publishing online, one that delivered value to an audience and also sped up the sharing process to one that worked at a corporate time scale. The third was being picked up by a writer, Sara Corbett, for a long-form feature she wrote for *The New York Times Magazine* about the impact of cell phones on economically less-developed countries. There were more qualified researchers through which she could have told the story, but my unpolished online presence gave her confidence that I was probably legitimate. Dots connect in ways that can be influenced, but not predicted. The only certainty is that you need to put some of yourself out there for it to be discoverable, let alone discovered.

Serendipity plays an important role—choosing the best carefully weighted options, correct application, and having talented colleagues



and a supportive network all contribute in equal measure. Then there is the mind-set.

Truly great research adheres to a higher truth than mere career trajectories, project timelines, or the client's ask. The story that is revealed is not always necessarily the one the client, your colleagues, or you yourself want to hear. The truth takes courage. The question is whether you are ready to face the consequences that arise from telling it. Great research questions your place in the world long after the project has been delivered.

This higher calling can require years in the wilderness, with no guarantee of professional acknowledgement or reward, forgoing the trappings of corporate advancement for the opportunity to do interesting work. It involves seeking out the most interesting people to work with and doing whatever it takes to be in-field alongside them. Identify the centre of your community, and then walk in the other direction to expand your expertise beyond what is comfortable. Invest in ideas that no client would, or should, initiate. These bets on the future, often in the form of experiments, will push boundaries, raise horizons, and deepen understanding.

Every year I run at least one experiment that explores the edges of my craft, from understanding the impact of a researcher's presence in higher-risk environments and, engaging hundreds of people to engage in subtle, behaviourally subversive acts, to the psychology of a non-contractual supply chain on smuggled goods.

The most dangerous issue for a researcher to navigate is not army checkpoints, the ravages of nature, or corporate ex-communication, but success

The most dangerous issue for a researcher to navigate is not army checkpoints, the ravages of nature, or corporate ex-communication, but success. Media exposure and professional recognition anchor the researcher to a topic and a moment in time. It is a gilded cage of speaking appearances, easy-to-come-by commissions, and even easier deliverables. The risk of success is fourfold: success blunts the researcher's curiosity; the spotlight narrows from the team to the individual; it distorts relationships; and it raises the researcher's profile to the point where being a celebrity, in the loosest sense of the word, gets in the way of running successful projects. In an interconnected world, anonymity affords the absolute freedom to explore without judgment. A good field researcher values privacy more than publicity.

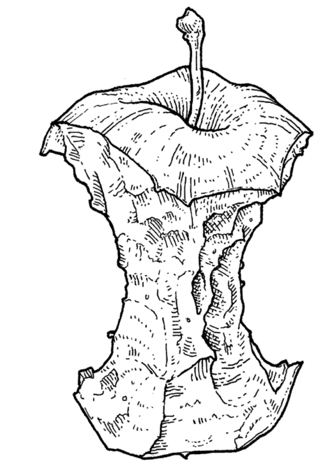
How organisations evolve

Most corporations have amnesia.

As an organisation grows its number of employees and it sets up distant outposts, it becomes increasingly difficult for any one person to track people and roles. The spatial awareness of who is doing what and why that is apparent in small teams is replaced by discreet groups—sometimes aligned, often not. For the evolving organisation, storytelling connects these disparate, geographically dispersed groups with a shared understanding of intent.

Who wants you to succeed? Who wants you to fail?

The following should be obvious: understand the motivations of your colleagues and align them to the success of the project. However, there will always be someone who wants success more than you. Sabotage, for example, leaking research results ahead of the formal release schedule, may be intentional or unintentional. A colleague may value her own success over those that of the project and look to tell the story through her own narrative, on her own timeline. Risks from your team are trivial to mitigate. The same cannot be said of those from your client.



Not everyone in your client's organisation wants your project to succeed. Having the budget to commission research means the organisation is larger, more political, and has more at stake than yours. A project's success or failure will signal the effectiveness of one person's strategy over another. Projects do not exist in a vacuum. Success disrupts the status quo. Failure entrenches it.

Primary & Secondary Audiences

Whom do you need to reach to have maximum impact?

The primary audience sets the tone of the deliverables. Failure to engage the primary audience is a failure of the project. Invest time in understanding names, roles, and how they will use the deliverables in their day-to-day work. Adapt the format of deliverables to ensure the highest impact, making custom versions of reports with a focused point of view. Set up 1:1 meetings, take the time to ensure they understand how the deliverables can impact their work, and follow-up.

The primary audience sets the tone, style, and content of what is shared

The primary audience sets the tone, style, and content of what is shared. Your secondary audience is more loosely defined. It includes generic groups—librarians, Kremlinologists, the design media—that have either a peripheral awareness of, or actively follow, your work. On most projects, they don't require proactive engagement until all other avenues have been exhausted. For a few projects, the client has hired you specifically to engage your network.

Understanding your reach

Who lies within reach?

It can take years of writing (or working in other media) to find a voice and identity that are distinct and you are comfortable with. Along the way, you'll move from being off-the-radar, ignored, challenged—if you're lucky—maybe even ridiculed by the people you're trying to reach. The response (or lack of) to every piece you put out informs the tone of the next. Along the way, you'll pick up advocates and competitors. Provocative pieces will reveal the edges of your community—those who step up to criticise and those who step in and defend your work. Over time, you'll build an audience that values your perspective and insight.

Anyone with money can pay to find an audience through advertisements, where it, too, takes time to tease out the most appropriate content and media. There's always someone willing to pay more for exposure. Transactional relationships that are not converted are fleeting at best.

The easiest way to change the mind-set of an organisation is for those within it to discover your point of view through their favourite trusted media source. Anything published externally with your organisation's name on it will be assumed to be officially sanctioned.

Understanding the value of your reach

Attention, and actions that derive from that attention, are easily monetised through advertising. Regardless of whether you aspire to it or rally against it, the value of your reach is measured by professionals in your organisation. The appropriate metric is dependent on your organisation. For example, for a streetwear brand, your number of unique social media followers that, through you, discover the brand are converted into repeat paying customers, who then go on to propagate the brand. A far rougher measurement is advertising value equivalency (AVE), the cost of achieving the same coverage when the media space is paid for. If your research generates an eight-page spread in *The New York Times Magazine*—where a full-colour, full-page ad costs in the region of $100,000/page as of 2016—then the AVE value is $800,000. This doesn't mean the researcher's value to the organisation is the same, but it does provide a relative benchmark against other communications activities.

Just as a researcher may be wary of being too closely associated with a client, so too will corporations be wary of any third party overstating the strength of their relationship.

Why research is shared externally

Humans are hardwired to be curious about other people's lives, to care about stories with a strong human presence, such as those generated by field research. This competitive edge over other, less emotionally engaging data often obscures the real reason field research is shared in the public domain.

If you want to be mildly cynical, field research provides a human angle to the otherwise faceless and numbers-driven corporation. It's a public statement that the organisation puts people, users, and customers first in its quest to bring products and services to market, regardless of whether that is in an actual internal reality.

Field research has all the markers of value—authenticity, novelty, insight—but is rarely called on to deliver on that value. It can be shared publicly because, taken out of context of a problem or opportunity, it has limited or no intrinsic value to competitors.

Field research has all the markers of value—authenticity, novelty, insight—but is rarely called on to deliver on that value. It can be shared publicly because, taken out of context of a problem or opportunity, it has limited or no intrinsic value to competitors. It allows the organisation to communicate intent without revealing the outcome of that intent. It enables the organisation to attract talent, generate conversations within the community, and gain mindshare for what is to follow. The question then becomes, what is to follow?

Any organisation that values the data will want to keep it confidential internally, and package it into something that fits into the broader story arc before deciding whether, and what, to publish.

The art of sharing is to reveal just enough to be interesting to the primary audience, but not so much as to spoil what is to follow.

Why research is not shared

The decision of what is morally and legally OK to share is covered by the data consent and the team's approach. Handing over the deliverable is a moment of truth for the researcher. After this point, she can no longer function as the gatekeeper to the participant's well-being. Success means deliverables are consumed, considered, and retold through the voice of that audience, and their audience after them. Each retelling increases the distance to the participant and, with it, the risk things will be reinterpreted and taken out of context. It takes the delivery of a number of projects to understand the value of field research and the risk it poses to clients and their organisations when it is shared. The principle of "participants first" helps reduce the risk of heart-stopping moments, when things are taken out of context, because the data is already calibrated to local social norms.

How data is shared

The "how" of sharing data involves not only the what and when but with whom—and the sharing itself is a process affected by all three. The speed of sharing depends on its application: a product team may want the data at the end of the day, a busy client in a weekly summary, a strategy team at the end of the project.

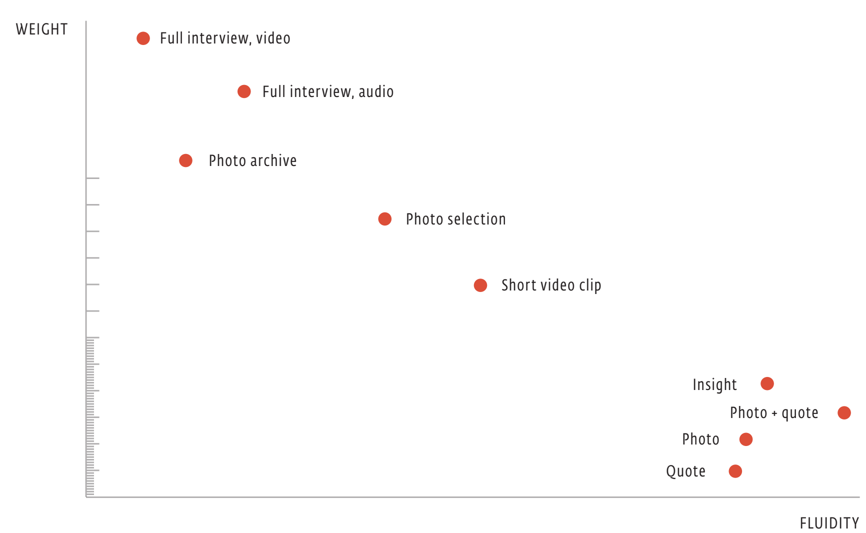


FIGURE 66.

The weight and fluidity of data

The fluidity of data

A useful concept for sharing is the fluidity of data—its ability to travel within the project team, to stakeholders, and through the client's organisation. The atomistic unit that has the highest signal-to-noise ratio and is widely shared is typically one medium-resolution photo plus one observation where the insight is relatively obvious and doesn't require additional explanation. The right process is able to optimise many photos for maximum fluidity.

The weight of data

A second useful concept is the weight of data: the sum of logistical, psychological, and financial costs for obtaining, managing, storing, and using data prior to drawing value from it. The weight of data changes over time as tools evolve. The most overlooked aspect impacting weight is the psychological cost: the mental energy consumed when data is collected but not effectively processed. For example, audio recordings of interviews that are stored but never listened to, and the researcher's niggling doubt that she is in some way shortchanging the study by not having them transcribed. Collect only what you can act on.

Who gets to share internally

Sharing implies also having the authority to share, which implies being a key decision-maker in the organisation or being close to the decision-makers. By default, the client or the project lead leads the sharing. With all that's at stake in the act of sharing, it's the moment when project tensions regarding who did what work are most likely to surface.

Who gets to share externally

Sharing externally implies buy-in from the highest authority in the organisation. It assumes the tribe has agreed there's something they wish the world to know and the sharer is the person best equipped to do it. It indicates the sharer has an important role in helping the tribe survive.

Most corporations provide media training for employees to understand the media landscape, the kinds of interviewers and interviews they will encounter, and how to respond to difficult questions. C-suite and other senior executives in the organisation often have external-facing roles, as do experts in specific domains.

The sharing of formal announcements is overseen by the communications department, which itself identifies both top-tier media that best reach the primary audience and the most appropriate event—ideally an opening keynote—at which to speak, or may decide it's better for the company to host an event itself.

The formal media process often feels like a circus. Giving forty media interviews over three days of a conference can dull the most authentic of storytellers. On the opposite side of the table, to the journalist, one interviewee will blur into the next. To a tired journalist, a charismatic researcher has the edge over the standard suit and tie.

Preparing for media interviews

Never walk into a media interview blind. Understand what interviewers have previously written—the tone of their writing, whom they're writing for, and what else their audiences enjoy. Some journalists arrive with a story already in place and are just looking for colour or a quote. Others

CASE STUDY 07.

Community & partner engagement

"I have a hunch that these nascent customer behaviours mean something. But what? Given what we've learned, how can we engage with partners looking to [redacted]? What does our rapidly growing organisation stand for?"

LOCATIONS
China, India, Japan, US (primary markets), Afghanistan, Brazil, Myanmar, Russia, Saudi Arabia, South Korea, and Zimbabwe (secondary markets)

TEAM
Three design-researchers
+ strategist
+ eleven fixers & guides
+ print designer
+ writer
+ advisory board
+ internal stakeholders
+ partners

TIMESCALE
Twelve months

CLIENT
Corporate

STAKEHOLDER
[redacted], executive team

DELIVERABLE
Foundational research report, white paper, partner engagement model, roadmap for engaging community.

The corporate client had disrupted the [redacted] industry. While immensely successful, this [redacted] with a number of stakeholders that were [redacted].

Working alongside the [redacted] the project kicked off with research in [redacted] on a hunch that it would identify meaningful new patterns of behaviour. After proving out this hypothesis, this was expanded into a two-month research project that spanned Tokyo, Chengdu, and Pune with each study informing the questions asked in the next. Local researchers were hired in secondary research locations such as Yangon, Harare and Curitiba, to explore interesting outliers.

A white paper was drafted to position the [redacted]: to present itself as a credible partner to these stakeholders, and to lay out the strategic intent of the company's business model. A number of strategic scenarios were explored, including their impact on the bottom line, steered over a four-month period, bringing in the voices of the [redacted], subject-area experts and other organisational stakeholders.

At the same time, the corporation was being approached by [redacted] wishing to [redacted] that were more suited to new patterns of use enabled by their platform. The foundational research and strategic repositioning enabled the client to become a more meaningful partner to [redacted] and [redacted].

There were many strands to this work, with a number of activities having a direct line that could be traced to the original research. Other influence was more subtle, infused into the organisational culture, language and outlook. Insights that become common sense are owned by everyone.

All told, deliverables included the foundational report, [redacted], partnerships, and an engagement model that could scale globally. Having delivered a foundational research piece, the client decided to invest in an exhibition and booklet to reach their primary audience, [redacted] at [redacted]. The secondary audience, [redacted] in [redacted] were addressed through digital touchpoints and the delivery of the printed booklet.

A design agency specialising in print was engaged to translate the research into a booklet and exhibition. While confidential, the booklet was also suitable for corporate partners.

are more open to the story revealing itself through the interview. Wire journalists have the highest pressures and shortest attention span and need to ascertain within the first few minutes whether an interview will yield something of value to the wire service. They are a good place to learn if you enjoy an argument. A good journalist can sniff bullshit by looking at the cow.

What is shared when
What data is shared when can alter both how data is perceived and its impact.

Immediacy of data
Connectivity speeds up the tempo of research and supports real-time or near-time decision-making, analysis, and sharing. In what ways does immediate sharing of field-study data benefit the project? In what ways is it a drawback?

The real-time sharing of data as it is collected has retained a certain allure for the novice research team and client. The promise is that, by sharing, the researcher will engage stakeholders and the broader community in such a way that she can meaningfully impact the project. This is largely a fallacy. Data is noise. The ability to turn data into something valued requires contextual understanding, nuanced conversations, and reflection. Why, then, do so many field researchers persist in sharing data prior to sharing the deliverables?

In most instances, the main beneficiary of immediacy is the researcher herself. It allows her to position herself to social peers, and to create an association to a specific time and place, theme, or project. It also serves as a note-to-self, a moment of focus, in an otherwise blurred schedule. It maintains weak ties and grooms the secondary audience for the final deliverable. It rarely, however, reaches the primary audience through these channels. The effort to share in real time comes at a cost—it invariably takes the sharer out of the moment.

The lack of value hasn't stopped service providers from offering "real-time field data" feeds from their "global scout networks". In most instances, these provide false reassurance to people who aren't aware of what they don't know.

Near-time sharing
There is an exceedingly narrow range of activities where real-time sharing has value. For example, with minimal training, a repetitive task—such as analysing the contents of tens of thousands of satellite images—can be farmed out to the online crowd.

The more synthesis carried out on data before sharing, the greater the baked-in value that can be transferred to the audience. Even concurrent

[redacted] Case Studies
It's rare to be able to talk publicly about commercial work, because it is inherently confidential and is normally an upstream activity that can take years to play out. Over the course of my career, I've had the good fortune of working across diverse industries and geographies—from the trenches to the boardroom. As someone who is paid to contribute to another organisation's success, I'm comfortable with most of my work being, and remaining confidential.

The commonalities across projects at Studio D are that they start with a simple question; reveal complex issues; require field work in (politically, socially, and occasionally violently) sensitive environments; are international in scope; and bridge corporate, domains, and local cultures. They require teams with diverse and often non-traditional skills, working alongside partner organisations, and have the opportunity for driving positive social impact.

The mostly redacted case study on the opposite page shows how a single foundational research project can extrapolate into a multitude of deliverables, impacting the organisational culture, challenge brand values, partnerships, products, marketing and communications.

studies require a degree of synthesis before sharing.

The drawback of sharing data with a wide audience is in sorting the signal from the noise, having the perspective to put any point of data into a context and weighing it against other data. The researcher is also not aware of what or who she is revealing and, in the process, overshares both morally and legally, violating participant privacy.

Evergreen content

At the other end of the timeline is evergreen content that's suitable to publish at any time. Field research generates insight into human behaviour, the motivations of which remain relatively constant over time—even if it appears to be different on the surface.

Event-related content

Identify which elements of the final deliverables are suitable for sharing with which audience—and where that audience comes together. Research content may be strong enough to build an event around, for example, the launch of a new strategy or product.

Where data is shared

Sharing is usually managed by the corporate communications team. If you don't have organisational backing, you can pull together a strategy yourself. In the short term, draw up a list of preferred publishing outlets—news sites, lifestyle magazines, specialist presses, journals, both online and off. Understand their submissions process. Identify the writers most likely to be assigned your work and whether you have a relationship with them. Reach out with a concise summary of the research, with links to who you are and the source material. Stick to the facts. They'll reach out if they want more.

Over the medium to long term, identify which writers cover analogous subjects. Follow their careers. Connect. Understand what makes them tick and what they may be interested in. The most meaningful way to nurture relationships with a journalist or media writer is by hiring her onto projects, either in-field as a researcher or to review and write more formal content.

The writer will be looking to ascertain your credibility. Journalists have a far higher credibility threshold than media writers. Sites come and go as link rot sets in, so maintain at least one platform where you have full control and can self-publish—at a minimum, dates and titles of your research, essays, and conference presentations. Avoid proprietary formats that, in the short space of five years, will be out of date and difficult, if not impossible, to access. The sparseness of the site in your early career will be replaced by a rich foliage as your expertise takes root. Your site doesn't need to be the first place people discover your work, but when all else fails, is what you have to fall back to.

Publishing lead-times vary considerably. A blog post can be published in a matter of minutes. A journal submission can take a year or more.

To write is not the same as being a writer. Recognise that writing is a profession, and that by that metric, it's unlikely that anyone on the team is qualified. Most agencies and many executives hire writers to raise the standard of their ghost-written submissions. Publications such as the *Harvard Business Review* (HBR) will invite submissions and hire a preferred writer to ensure they're appropriately written in the HBR format and in a suitable tone, from the ground up.

Bylines can be tricky. The report is a team effort, whereas many publications only accept a single person's byline. At Studio D, we rotate bylines (with the lead writer taking the pick of the crop) and stay transparent in the decision of who is bylined where.

Understand where the power in publishing lies. Being featured in an article is the lowest rung, followed by authoring an article. Then comes being the editor and/or contributions editor, and finally, the greatest power lies in owning the publishing platform itself.

Competitions and awards

Awards are given out by people who want to be seen giving out awards, to people who want to be seen receiving them. The decision of whether to take part in a competition is simple: is it important to you? The easiest way to receive an award is to host the event yourself.

Partnering and associations

Which people and organisations do you want the research to be associated with and why? There are many ways to create associations—from content-sharing agreements, guest posts, an invitation to write a foreword, and co-hosting events to cross-licensing on social media streams.

Most organisations have an invited speaker series that benefits the invitee—who is seen to be connecting to the wider community—and the invited, who benefits from greater exposure. Every brand brings something different to the table, whether it's the Instituto Geográphico Militar in La Paz, the Tate Modern in London, Strelka in Moscow, or Stanford in California.

The penultimate chapter describes how organisations value projects by assessing their impact. It considers what to measure, what is missing, and when it is better not to measure. It also describes *those projects*, the ones that impact who we are, and what we want to become.