

4 Steps to Summarize & 3 Tips to Craft Insights

Once you've learned through observation, interviewing, empathy and extremes, move through the 4 steps to summarize insights. Also, use the 3 tips to craft your insights making them compelling and motivating.

4 Steps to Summarize Insights

1 CAPTURING INDIVIDUAL DATA POINTS

On post-its, capture quotes, observations and interpretations you have from your interviews, observations, empathy immersion and learnings from extremes.

2 CONNECTING THEM TOGETHER IN MEANINGFUL WAYS

Notice themes and patterns and cluster your post-its when they have similar topics. Try out a few things you might call that theme.

3 CRAFTING INSIGHTS TO SHARE WITH OTHERS

Work to make your insights informative, inspiring and memorable. Try and try again. Share what you are working on with others for feedback. What's working and what isn't?

4 STORYTELLING YOUR POINT OF VIEW THROUGH WORDS AND VISUALS

Pull your themes together into a story. Use visuals to bring your points to life for others.

3 TIPS FOR CRAFTING A GOOD INSIGHT

As you work on sharing the most important things you've learned with others, focus on these 3 qualities of a good insight:

- 1 **INFORM** Does it shed light on what people need and want?
- 2 **INSPIRE** Is it motivating? Does it make you FEEL something in order to DO something?
- 3 **MEMORABLE** Is it phrased in a way that will stick with you and be easy to share with others?

The Anatomy

The Anatomy of an Insight

Here's how you know you have an insight worth sharing.

SHARING WHAT YOU'VE LEARNED

Insights are the heart and soul of creating solutions. You can't leverage the richness of what you've learned in the field to inform your team or your work if it's locked inside your head.

Sharing your learnings aloud allows you to bring them to life in the shape of stories. When we communicate insights in a compelling way, we motivate people to take action.

WHAT'S AN INSIGHT?

For something to be an insight, it needs to be:

AUTHENTIC Supported by observations with real people.

NON-OBVIOUS "News you can use" that goes beyond an observation or something someone would immediately think of when describing the subject.

REVEALING Offers a (previously hidden) glimpse into how people think or feel. It helps interpret the "Why?" behind human behavior.



Summarizing Insights Step 1 Capturing

The first step is to capture your raw learnings as data points. On post-it notes, capture quotes, observations and interpretations from your interviews, immersive empathy exercises and learnings from extremes.

CAPTURING YOUR RAW LEARNINGS

DATA POINTS

Raw learnings are the recollections of what stood out during a conversation or observation. Turn them into data points: direct quotes, anecdotes, feelings, interactions, things that caught your eye, interpretations...

WHERE TO START

Start with the individuals you met and the places you visited.

WHAT TO FOCUS ON

Focus on the things you found MOST interesting or unexpected. Don't worry about interpreting these stories yet!

ONE POINT PER POST-IT

Write each data point on a separate post-it note, so you can move it around in Step 2 "Connecting".

HOW TO CAPTURE

Capture each data point as a statement, phrase or visual. Push yourself to think beyond words and communicate your notes visually whenever possible.

PROMPTS TO HELP YOU CAPTURE DATA POINTS

+ TOP 10

For each person or activity, note the 10 most interesting or inspiring things you heard or observed.

+ UNEXPECTED

What were the most inspiring stories or unexpected events?

+ INTERESTING STORIES

What was the most memorable and surprising story?

+ INTERACTIONS

What was compelling about the way he/she interacted with his/her environment?

+ MOTIVATIONS

What did he/she care about most? What motivates him/her?

+ FRUSTRATIONS

What frustrated him/her? What does he/she struggle with?

+ READ BETWEEN THE LINES

Tune into participants' emotions, contradictions, workarounds, body language and surprises. Resist the urge to project your own ideas.

Summarizing Insights Step 2 Connecting

The second step is to connect your data points together in meaningful ways. Notice themes and patterns. Cluster your post-its when they have similar topics. Then give each cluster headline.

LOOKING FOR THEMES

+ RE-ARRANGE POST-ITS INTO “CLUSTERS”.

Which data points (quotes, stories, anecdotes, etc.) are related to each other in some way?

+ ACTIVELY LISTEN AND LOOK FOR MEANING.

Talk about your post-its with others. Compare and contrast. Make connections between stories.

+ WRITE HEADLINES.

Craft a concise label or headline for each cluster.

+ SORT AND RE-SORT YOUR INSIGHTS INTO CLUSTERS AND THEMES.

Look for patterns and tensions in the ways your clusters or themes relate to each other.

+ LOOK FOR LINKS BETWEEN THEMES.

Group several related themes into larger categories. What contradictions do you find? What feels surprising and why?

+ HIGHLIGHT BEST STORIES FOR A THEME.

Which quote, story, anecdote, or observation best brings your theme or headline to life?

+ DIG DEEPER.

Regroup the information and write new versions of your headlines until they feel strong. Dig deeper by asking “Why?” several times.

+ EDIT BRUTALLY.

It's not about capturing everything. It's about surfacing the best of the best.

Summarizing Insights Step 3 Crafting

The third step is to craft and share insights that are informative, inspiring and memorable.

THE ART OF CRAFTING INSIGHTS

Great insights don't just 'appear' out of your observations and conversations. You have to craft them.

+ INTUITION IS YOUR GUIDE.

Rely heavily on what 'feels' meaningful and push yourself to take leaps and make connections.

+ EMBRACE THE MESS.

Get comfortable with the chaos. Honing insights gets a little messy until the big idea emerges. Let the process meander and flow until things feel anchored.

+ DON'T RUSH THE PROCESS.

It may take a while to find meaning, so give it some time to emerge.

CRAFTING WORKS WELL IN PAIRS AND TEAMS

It's fine to work alone, but ultimately, you'll want to share your insights with others. Working side by side with one or more people can help the process.

+ TRADE STORIES WITH SOMEONE ELSE.

What are the top 3-5 most interesting things you've learned? Put them into words in less than 10 minutes. Then listen to what someone else has learned on a similar challenge.

+ BUILD ON THE IDEAS OF OTHERS.

Use what they say to spark new thoughts.

+ LISTEN ACTIVELY.

Engaging and paying close attention to details is critical to the process.

+ PRESENT YOUR INSIGHTS TO OTHERS FOR FEEDBACK.

Do a quick presentation to someone you trust. Pull it together in 2 hours or less and then share. Ask them what's working and what isn't. What/s confusing? What's informative, inspiring, and memorable?

Summarizing Insights Step 4 Storytelling

The fourth step is to pull your themes together into a story, using visuals that bring your points to life.

GET IN TOUCH WITH YOUR INNER STORYTELLER

Great insights don't just 'appear' out of your observations and conversations. You have to craft them.

+ BRING CREATIVITY AND YOUR OWN PERSPECTIVE TO THIS PROCESS.

There's no 'right' answer. It's about sharing your unique point of view to motivate others. Try out different storytelling techniques such as photography, video, metaphors and vignettes.

+ **EXPERIMENT** with the wording and structure to best communicate your insights.

+ INTUITION IS YOUR GUIDE.

Rely heavily on what 'feels' meaningful and push yourself to take leaps and make connections.

+ **GATHER FEEDBACK** from others as you craft and practice telling your story. What's working and what isn't?

WHEN SHARING STORIES

+ STAY AWAY FROM GENERALIZATIONS.

These include judgments, evaluations, assumptions and prescriptions (thoughts that start with "should, would or could")

+ TELL SPECIFIC STORIES.

Focus on the individuals and talk about what actually happened. It helps to begin stories with "One time..." or "After such and such happened..."

+ TELL IT THROUGH WORDS AND PICTURES.

Experiment with words, charts, images and prototypes until you have a robust way to express your thinking.

+ BE DESCRIPTIVE.

Share vivid details. Use physical senses and emotions to give texture to stories.

+ EDIT AND FILTER.

Don't be afraid to let go of superfluous information or patterns that don't move the project ahead.