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Discovery: Getting To Know Your Client (and the people they serve)

By **David Kief** | February 11, 2016
User Experience

Here at CHIEF we don't just work on projects, we build relationships with our clients. Like all great relationships, this begins by getting to know each other. To accomplish this, the project team always starts out with a period of research, which we call the "discovery" phase. During this time we immerse ourselves in our client's world to better understand their business and what they're trying to accomplish. This deep dive allows us to gather valuable information that we later use to develop solutions for their needs.

Since there are so many different approaches to the discovery phase, we've decided to share some of what we at CHIEF have found works well for uncovering critical client information. Let's dive in!

Help us, help you.

We start our discovery by asking our clients questions. Lots and *lots* of questions. This is a learning experience for both parties. We both know something that the other doesn't, and we both need that 'something' to make a great final product. Which is why crafting the right questions is crucial to getting to the heart of UX solutions.

Some of the first questions we ask at the outset of a project are: what are the **needs**, **wants**, **goals** and **pain points** of the people who are spearheading the project (as well as the audiences they're targeting). These questions may seem simple, but we push ourselves to dig deeper. Here are a few things to consider:

+ When asking about goals be sure to probe not just about business objectives, but also on goals surrounding the organization's mission, vision and values. These may be long-term goals that cannot be addressed within the scope of the project, but will be important to know going into a redesign. We want to know from our clients why they are engaging in the project in the first place. (Pro Tip: Ask the 5 Whys)

+ You should of course gain understanding of what the current audience needs and wants, but challenge yourself to think about the future users of a product that has yet to be defined.

+ If your project is task-oriented, focus on understanding those individual tasks. Does the product or service accomplish everything users are trying to do, or are people using the product to accomplish a small part of a larger task? Context is important and has the potential to uncover opportunities for added value.

+ What other products or services do users use to accomplish these tasks or similar tasks? Looking beyond competitors to other industries or market spaces often uncovers new insights or potential solutions.

+ What mindset are audiences in when they visit the website? What is important to them in that moment? What are their frustrations? Knowing someone's state of mind when they need something allows you to design a better solution.

Where the rubber meets the road.

Using the insights gained from discovery questions mentioned above, we then begin to identify:

+ Where overlaps exist between the stakeholders and their target audience.

+ Where disparities exist and how we can help clients bridge those gaps.

+ Where new opportunities lie and how they may be optimized to achieve project goals.

One way to start organizing your findings is by using affinity diagram, a business tool that groups data based on their natural relationships. Whatever tool you use, the number one thing you want to walk away with after your first round of discovery is a roadmap that your team can use to guide the project to successful completion.

Just remember, problems may be complex but the solutions are simple. You'll undoubtedly hit a roadblock, but #BeBrave and pivot to a new direction The most important tools aren't the latest software programs or prototyping apps, but rather your eyes, ears and a burning curiosity to understand *why*. The most novel UX solutions often come from unexpected places—so trust your instincts, let them guide you and don't be afraid to ask *even more* questions.

Speaking of questions, got any for us? Leave us a note in the comments below.

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