PET Research

Looking deeper to understand motivations

A Conversation with Eric Schaffer
CEO and Founder
Human Factors International

PET Research—Looking deeper to understand motivations

In this conversation, Dr. Schaffer talks about PET Research, in-depth interviews to uncover users' drives and blocks to decision making.

"People expect to be able to navigate, they expect to be able to understand. The next frontier is in persuasion. Today, that's the big differentiator."

Share this

Dr. Eric Schaffer, CEO of Human Factors, talks about PET Research

What is PET Research?

PET Research is a methodology that we've developed for getting people to reveal their emotional schema around making decisions. This methodology is founded in Gestalt interviewing methods. Those Gestalt interviewing methods came from Kurt Lewin, through Tamara Dembo who taught me, and are based on the idea that a gestalt psychologist is getting the picture. So, these are not methods that are intended to yield statistical results. Rather, they're intended to give an insight into the overall picture of what's going on in making a decision.

> **"These methods are intended to give an insight into the overall picture of what's going on in making a decision."**

Dr. Schaffer conducting a PET Research interview

How is this different from regular data gathering? Is data gathering a little more related to the statistical angle.

Well, the traditional task-analytic interview method is focused on determining a flow of work. So, if you think about a website, I can interview you about how you go about doing something. I can also interview you about the drives, the blocks, the feelings, at any given point where you have to make a decision. These are two very different perspectives.

Share this

Quantitative methods tend to be surveys which are very superficial. For example, working with a bank in Africa, we had a study presented to us which said over 40% of customers were not interested in internet banking. The thing is, that didn't give us any insight that was useful. So, we can ask, "Well, what are the difficulties users might have in internet banking?" Some people would have trouble in finding connectivity, or getting an opportunity that was secure during the day. These are task-analytic problems.

But there's a another set of issues where people are concerned about bank safety and privacy, and about feeling secure that transactions have occurred. These types of issues can only be revealed by in-depth PET Research methods.

> **"The traditional task-analytic interview method is focused on determining a flow of work. I can also interview you about the drives, the blocks, the feelings, at any given point where you have to make a decision. These are two very different perspectives."**
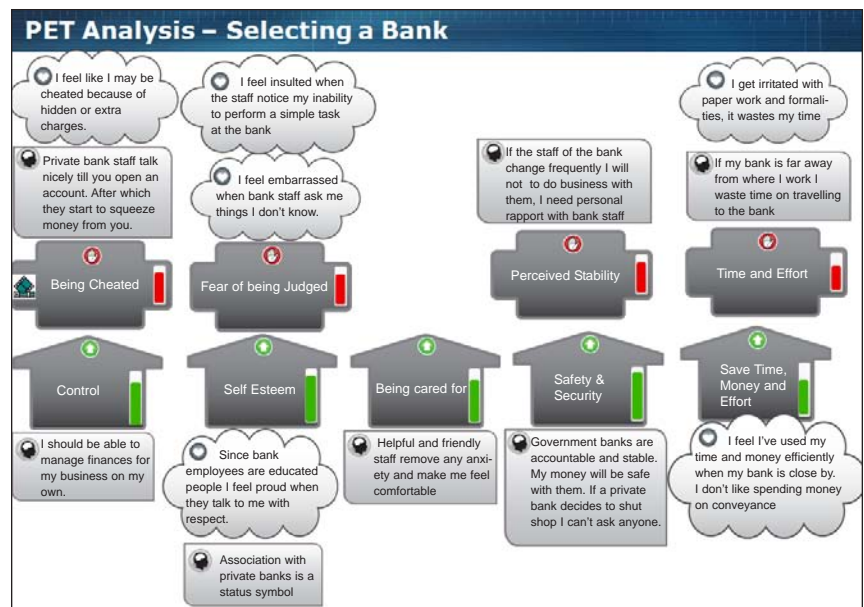
Examples of drives and blocks uncovered by PET Research for selecting a bank

How does PET Research differ from a PET Review? Doesn't a PET Review also look into these drives and blocks?

No. When we do a PET review, we may model some initial expectations, but we don't have the data, we don't have the PET analysis. What we're doing mostly in a PET review is looking at principles of persuasion. So, we can look at a site and

Share this

say "Does it have a plausible persuasion flow? Does it seem like it's going to be properly using persuasion engineering tools?" But, that's very different from the very intentional methodology that we have.

Many people today, as they start to learn about PET tools, begin to use them indiscriminately in their sites. I had a president of one of the world's largest e-commerce companies say "Okay, we're going to have a scarcity project" because he had just learned about the principle of scarcity. I thought that was pretty funny, because that's just throwing tools around.

> **"What we want to do is have a strategy—a PET strategy—that uses a set of tools very intentionally, tools that are targeted to specific understandings of the customers' emotional process in making a decision"**

What we want to do is have a strategy—a PET strategy—that uses a set of tools very intentionally, tools that are targeted to specific understandings of the customers' emotional process in making a decision—the customers' internal battle that goes on as they feel guilty about making the expenditure, but at the same time feel it will be high-status to get the product. Understanding that dynamic and setting up PET tools specifically to stimulate drives and reduce blocks is the intentional process of developing a PET structure. We don't want to just toss tools at something.

So, we have a PET review that asks, "Are you reasonably using PET tools, do you have a flow that makes sense?" You can tell that without doing any research, based on what's in the literature and systematic models. But, to really solve a persuasion equation you need PET Research to give you deep insight into the user, and then you need to develop a strategy using those PET tools which will be most effective in getting the conversion that's being sought.

So the new data you get from PET Research gives a much deeper understanding of the user's motivation and blocks than say, traditional data gathering.

Right. It may be that in an ethnographic interview, or in a classical, task-analytic interview, we may stumble on one or two drives or blocks—and that's useful—but it's even more useful if we focus on it.

So at HFI is we train people to do PET Research. It takes four weeks of full time training with me to become good at doing this kind of persuasion interview. The PET interview technique really requires a high level of skill because we don't

Share this

want to walk away with an incorrect impression, and we don't want to walk away with a superficial impression. The problem is that most methods in which users talk about their feelings give a very superficial understanding. That's not very powerful. The more intimate, the more subtle the information is that we get, the easier it is to apply the correct tools to bring about the desired design result.

Doesn't market research already look into what drives users and what blocks them? How would this vary from traditional market research?

I find that market research tends to give you two different things.

The qualitative research tends to give you some feelings or some beliefs, but I find it to be rather superficial. A person reports feeling anxious about spending more than a given amount of money. That's interesting, but we don't know why they feel anxious–is it because they feel guilty, or that they'll be embarrassed, or their parents will cross-examine them and make them feel inadequate? Whatever those deeper feelings are, they are very important. It's not enough to have this superficial level of "somebody is anxious about spending more than x amount." We need to go deeper into what these feelings are about, what beliefs are underlying these decisions. In the qualitative research, we tend not to see as much depth as we like.

In the quantitative research, there's a tenancy to ask people very superficial questions. Sometimes it's pretty funny. You'll see some very sophisticated methods being used. For example, conjoint analysis is a method used to determine the value of different functions that might be made available in a product. But we can end up doing sophisticated mathematical treatment of nonsense data. Why? Because what people say about what they'll pay for a product or how they value a product is not a good reflection of what will actually happen. So, we're using sophisticated math to churn up garbage, and out comes garbage. We see major decisions of pricing and feature mix made based on these kinds of self-reports which are not very accurate.

In PET work, we feel that it's more important to really first understand what the deeper drivers and blocks are in making a decision and then build a holistic solution around that understanding.

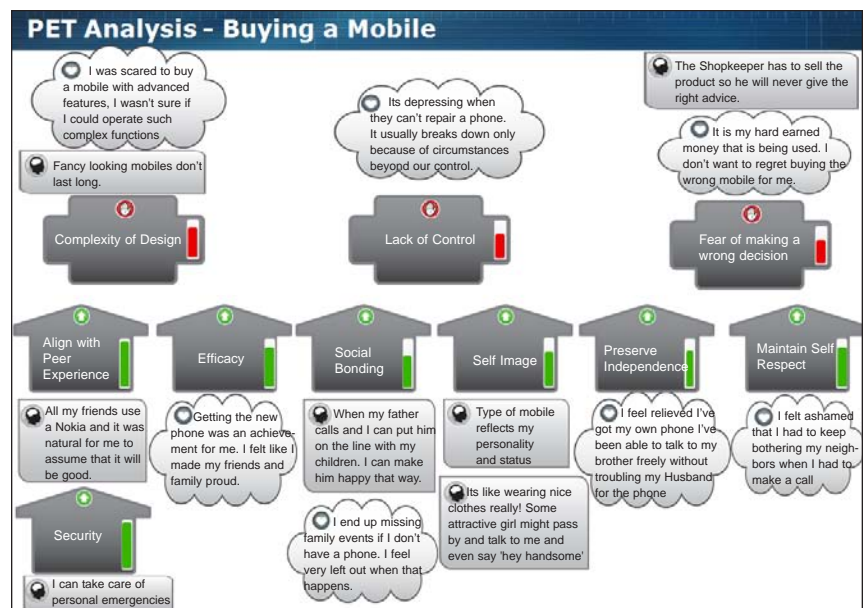> **"The more intimate, the more subtle the information is that we can get, the easier it is to apply the correct tools to bring about the desired design result."**

Share this

You must have had to develop some unique and interesting new approaches to be able to elicit this deeper information from people. It seems like it's the kind of thing they would not want to tell you outright.

Yes. It takes a huge amount of skill to get people to talk about these kinds of issues. But when you know what you are doing, the kinds of things that people reveal are truly amazing. Those kinds of insights only happen when you have somebody trained to provide the right kind of setting so that people feel trust. You have to create the right kind of atmosphere. You need somebody who knows how to do active listening without even thinking, as a reflexive action, so they can draw people out. People that know how to direct people with intention, who know how to probe to get people to talk deeper and deeper about what's going on, and knowing how to ladder.

We have a technique called laddering which is used if somebody isn't sharing much data in order to dig in and get them to open up. This has to be done in a very careful way with somebody who's trained to manage any kind of difficult situation that comes up. So, the PET Research is really a remarkable and powerful technique we use to guide the design of websites.

"In PET work, we feel that it's more important to really first understand what the deeper drivers and blocks are in making a decision and then build a holistic solution around that understanding."

Buying a mobile phone involves several drives and blocks in this example

Share this

Maybe you could give us some concrete examples where the PET Research findings were unexpected but very useful.

We've used it as a way of guiding strategy for one bank. Understanding the deep issues that were going on for the customers led us to a whole new direction for moving customers from a physical bank to the digital media. Being able to understand their feelings allowed us to come up with very specific directions for moving people to use the internet.

We have used it also on product ideation. For example, looking at the feelings that are going on around the use of video. We've used it to suggest new products to a technology company. We've used it in a lot of very interesting ways, and of course we use it all the time to look at what is going on in the conversion process on websites. We've done this for everything from mobile and telephony companies, to banks and product companies, e-commerce companies, even government operations. We've seen a very wide usage of the data in the hands of people who understand how to use PET tools to get conversion.

> "We're able to see a thread from the highest level strategy to the most detailed design, and that thread has a commonality of being guided and informed in a deep understanding of the customer."
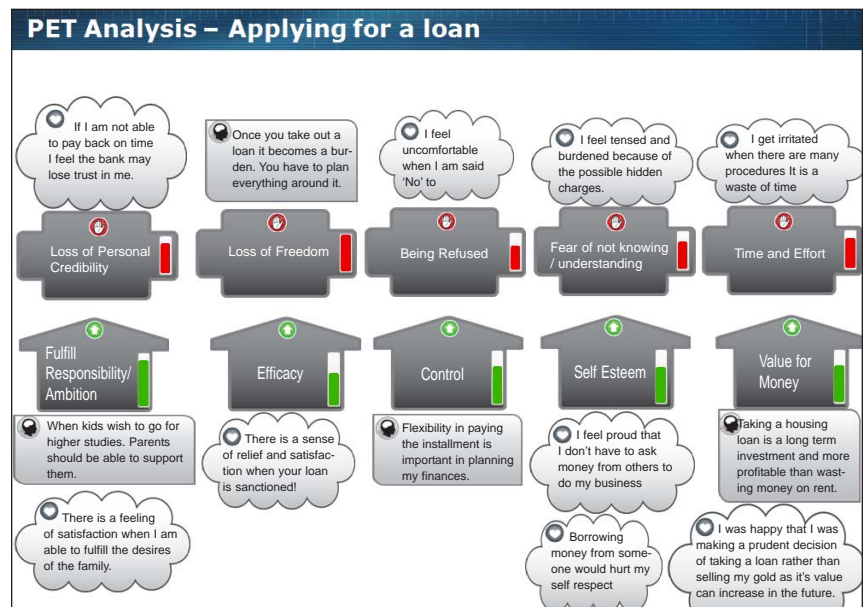
Applying for a loan can be an emotional minefield in some environments

Share this

Would you say that PET Research really gives information that helps at a strategic and innovation level rather than directly at the design level, or would it be both?

It can be used at many different levels. If you think about it, understanding your customer is central to everything from forming executive intent to overall organizational strategy—from channel strategy, to product ideation and business model ideation, to coming up with very specific website designs, even coming up with specific images. We're able to see a thread from the highest level strategy to the most detailed design, and that thread has a commonality of being guided and informed in a deep understanding of the customer.

> **"PET Research is specifically focused on the decision point. Clearly, in cases where people need to be converted to making a decision...we would want to use PET methods."**

In some ways it sounds like PET Research gives you more of an understanding of the entire ecosystem of users rather than just a certain persona.

Not really. Actually, if we want an ecosystem picture, we use ethnographically inspired methods. In the "Design for the Big" class, for example, we're sharing methods like culture probes and ecosystem modeling that allow us to get a big picture of who the different people are in an environment, and what their roles are, and how they interact. That's very different—that's looking at the big picture. PET Research allows us to go deeper within the big picture. If we have the big picture of "this is the school system" and we understand that, then we can look at one particular actor. For example, a parent and his or her feelings in deciding whether a child can go on a field trip. We can look at that if we want to focus on that particular conversion requirement.

What kinds of projects would most benefit from PET Research?

PET Research is specifically focused on the decision point. In cases where we need people to make particular decisions, such as buying a product, asking your doctor a health question, deciding to travel—these are all examples of where we've applied the PET methodology. If you simply have a task that needs to be done, and people are going to do it for whatever reason—maybe they're paid to do it—PET may not be important or worth investing in. But, clearly, in cases where people need to be converted to making a decision to supporting a product—whatever it might be—we would want to use PET methods.

Share this

Mostly in transactional kinds of sites, e-commerce, that kind of thing?

E-commerce is very obvious, but there are many other cases. It could be a bank who wants to get you working in the mobile environment and not in the branch. It could be a pharmaceutical company that wants you to ask your doctor about a vaccine. It could be a technology company that wants to develop a product that it wants you to buy. There are lots and lots of different applications. It could even be a government that wants to convince you that the government is providing good value to citizens, to continue to support that organization.

There are lots of different angles in terms of what's important to conversion and one of the things we do first—before we start doing any kind of work in the PET area—is identify the PET objective. The PET objective has to be a very solid organizational requirement, it can't just be something that's theoretically nice like, "They'll like us" or something, that is not an interesting PET objective.

> "One of the things we do first—before we start doing any kind of work in the PET area—is identify the PET objective. The PET objective has to be a very solid organizational requirement."

So the basis should be, "We really want our customers to convert on this product, but we find that there are lots of blocks, and we need to know how to deal with these."

Sure. If I have a product people want to buy—maybe a new mobile phone—what are the drives and blocks around that? What convinces people to want to get that new phone? What are the dynamics? What are the methods that are most likely to work?

The business benefits seem pretty obvious. Is there any way to actually measure the results of PET Research from a business point of view?

Certainly. We had cases where we made PET interventions and were able to measure predictable improvement in sales and conversion, often with a payback period of less than a month. We can almost always look to measure at least some clear business benefits.

Share this

Would you say the results of PET Research are some of the more dramatic things you've seen in your career.

Well actually, I think that it's the most dramatic thing we have *today*. There was a time when making usability improvements created a dramatic improvement because we had made it basically impossible to do a transaction. So, if you can't *do* a transaction, you really *don't* do them. So, that was a very exciting kind of improvement. Now, however, classic usability issues are considered the hygiene factors, and we don't see them as a differentiator anymore, they are just an expectation. People expect to be able to navigate, they expect to be able to understand. The next frontier is in persuasion. Today, that's the big differentiator.

"This is the beauty of PET Research— guiding the selection of the correct methodology. What PET Research does is give us a PET analysis that's accurate."

Would you say that when you're doing PET design, you should always have a research component? Or, are there cases where the research component is better, and others where a PET Review would be better?

Well, it's always good to have the PET Research, that's for sure. Certainly, I've seen cases where even we've done projects which were simply using PET methods. And, that will absolutely create an effect. But, if you want a really targeted solution, it's important to have the research and the structure with the strategy to go ahead and do the right overall process. If you don't do that, you get what we call "persuasion clutter." If you keep adding more and more persuasion tools, at some point it actually starts to become detrimental.

So, that would be part of the research, too? Finding out how many drive components you can put in before they become a block?

Well, it isn't that. It's just that if you are not informed of your customers' specific motivations, then you're just taking a shotgun approach, maybe throwing fifteen different persuasion tools out hoping that something works. It's far more powerful to say, "I'm going to use these three methods, but I know those are targeted, and I know that they're going to get the results I want." This is the beauty of PET Research–guiding the selection of the correct methodology.

What PET Research does is give us a PET analysis that's accurate. The PET analysis is something we developed–it took us several years, actually, because it's a

very difficult problem. We needed to figure out how to model the emotions of the user. We know how to model the task flow of the user, with task analysis, or use cases, or scenarios, and if you do a task analysis, you can get a pretty good estimate of the likelihood that a person will be able to do a task, and whether that task will be efficient. The PET analysis that results from the research is more what we use to model the conversion—the emotional journey of a customer going through a site.

"We want to have an overall structure —a plan which is informed and vali- dated. That's really what PET Research is about."

Is there anything else you'd like to add?

One thing is really critical today. I see people reading books about persuasion and I think it's good that they learn as much as they can about how to persuade customers. But, the problem is that just throwing tools at customers may work initially, but in time, it creates persuasion clutter, it deteriorates trust, and is not effective. We need to go beyond throwing out random persuasion methods, like commitment, scarcity, social proof. These are all good methods in their own right, but we don't want to just toss them out. We want to have an overall structure—a plan which is informed and validated. That's really what PET Research is about.

Well, thanks Eric. You've given us a lot to think about. I'm sure that as more questions come in from people who read this interview, there will be plenty of topics for future discussion.

Find out more about PET Research.
Contact Human Factors International at hfi@humanfactors.com

Share this

About Dr. Schaffer

Eric Schaffer, Ph.D., CUA, CPE
Founder and CEO
Human Factors International

Dr. Eric Schaffer is the founder and CEO of Human Factors International, Inc. (HFI). In the last quarter century, he has become known as the visionary who recognized that usability would be the driving force in the "Third Wave of the Information Age," following both hardware and software as the previous key differentiators. Like Gordon Moore's insight that processor power would double every 18 months, Dr. Schaffer foresaw that the most profound impact on corporate computing would be a positive online user experience—the ability for a user to get the job done efficiently, easily, and without frustration.

Dr. Schaffer's book, *Institutionalization of Usability: A Step-by-Step Guide*, provides a roadmap for companies to follow in order to make usability a systematic, routine practice throughout their organizations. Dr. Schaffer also co-developed The HFI Framework™, the only ISO-certifiable process for user-centered design, built on principles from human-computer interaction, ergonomics, psychology, computer science, and marketing.

Dr. Schaffer has completed projects for more than 100 Fortune 500 clients, providing user experience design consulting and training. He has recently been traveling the world teaching HFI's newest course, How to Design for Persuasion, Emotion, and Trust.

Dr. Schaffer is a member of the Human Factors and Ergonomics Society and a Certified Professional Ergonomist.

Share this

Human Factors
International

410 West Lowe, P.O. Box 2020
Fairfield, IA 52556
Phone: 800.242.4480
Fax: 641.472.5412
hfi@humanfactors.com
www.humanfactors.com

Share this