5 Ways of working

First steps 12 MIN READ

It's one thing knowing the theory. It's another knowing how to use it. There are a number of behaviour design frameworks. All curate and organise the principles of behavioural science into goals, strategies and tactics that designers can use on projects.

To learn more about the theories read: Ways of thinking

Phases of behaviour design

Like all design processes, the specifics vary from one team to another. But, the approach remains the same. Below is the process we use at BehaviourStudio, on projects in digital products and services, with clients including Microsoft, The British Government, The Estonian Government and more.

> When I started to define and establish the process at BehaviourStudio, I felt it was important to be able to easily collaborate with other teams and design sectors. Behavioural Design needs to fit into the language of design, not sit as a standalone process. The phases and tools are adapted from current approaches in service, UX and of course the double diamond. They should seem familiar, but with a behavioural science backbone

science backbone.

Lauren Kelly. Behaviour Design Director, BehaviourStudio.

A step-by-step process of behavioural design

Phase 1: Discover

The first step towards changing behaviour is to understand it. Whether you aim to change user, customer or employee behaviour, the basic approach to Discover is the same.

Ask yourself:

What are people doing?
What are people not doing?
What do people want to do?
What does the business want people to do?

Step 1: Create the behavioural objective

To start you need to define the problem. What behaviours do you want to start / stop people from doing? What actions do you want to increase or decrease? To define these to need to create a behavioural objective.

What is a behavioural objective?

When designing behaviour, it is important to transition from a business objective to a behavioural objective.

Behavioural objectives are focused on a person's actions and not on their feelings, perceptions or emotions. Usefully, they normalise the language around behaviour to one that is measurable and concrete. They can then be used with stakeholders, investors and those outside of the design process.

Stop Start Improve

What are the aims of a behavioural objective?

There are three areas that a behavioural objective can focus on:

1. Stop
If the behaviour that people are engaging in is destructive, harmful or unwanted then a stopping focused objective is a good place to start. Your aim is to prevent or change something that is happening.

2. Start
If people aren't currently doing the behaviour you expect, you can look at ways to encourage people to start new behaviours.

3. Improve
A person may already be doing a wanted behaviour, but not to the level that you expected. They are doing something in the right direction, you just aren't sure what or why. Usefully you have behavioural data to explore the problem further. Improvement objectives are framed around increasing a certain behaviour.

Writing a behavioural objective

The behavioural objective is the benchmark to measure the success of a project against. You use a behavioural objective to measure the impact of the project later on. They are particularly useful for lighthouse or one-off projects. The projects that you use to justify an approach or new process in a team. You need success metics to prove your work has impact. Your behavioural objective needs to be **specific**, **measurable** and **accurate**.

A behavioural objective is the what, where, when, by how much of a problem.

Define:
What do people need to start/stop/improve?
Where are they doing it?
When are they doing it?
By how much/less are they doing it?

Tips

Avoid assumptions
When establishing the objective, be careful not to include any assumptions about the person, their behaviour or environment. Try and keep it as focused, measurable and factual as possible. You will update your objective as you discover more and start to target which actions to change.

Avoid emotion
Emotion is difficult to accurately measure and is ambiguous. No two people's experience of an emotion is the same. They are difficult to collectively define, and importantly, very difficult to reliably measure. Stick to a person's actions.

Behavioural objectives and business needs

Behavioural objectives and business needs

Designers have to make decisions that benefit both the user and a business. When defining *what action* to target, think about the key behavioural goals of a product or service. At BehaviourStudio we work from 9 predefined behavioural goals. These goals are the nine that we see frequently in our digital product and service projects.

Businesses meet user behavioural goals in these nine ways:

1. Grab attention
2. Remove obstacles
3. Motivate activity
4. Maintain momentum
5. Make it easy to think about
6. Make it easy to assess options
7. Boost confidence in decision making
8. Make it relevant to the user
9. Stop people

Step 2:
Collect data

A behavioural designer starts with data. They use existing user data, but they also dive into existing behavioural research. This is an important and useful step. They are able to access existing information about the type of behaviour or action defined in the behavioural objective. They gather information that is cited and proven by academic behavioural scientists. It means you can leverage the large amount of existing information, without having to invest time and budget in it yourself.

A Behaviour Designer pulls data from three sources:

01. Existing data

If you are working on an existing product or within an established company there is data. For startups, look to similar products or services to extract data. Understand what people are doing, but focus the same effort on what people aren't doing. It's equally revealing.

02. Existing insight

Conduct a behavioural literature audit to set a direction. They give you proven insight into a relevant domain or sector, and highlight a direction you can use to start to refine the behavioural objective and research objectives. Behavioural lit audits save time and cost by discounting potential routes at the start of a project.

03. Existing needs and aspirations

Define what a business needs. Behaviour Design is focused on doing good, but the commercial benefit is just as important. Find out what behaviours and actions a business needs to achieve their goals. Conduct a business behavioural audit.

Step 2: Pick actions with influence

As with all projects, you'll quickly discover lots of actions with opportunities. It's important to narrow these down and select one behaviour to target. The more specific, the easier it is to measure in order to assess project success later on. It's best to define the behaviours on actions that have the biggest impact on people, business aims and ones highlighted in the literature review.

Ask yourself:

What actions have the biggest impact on people?
Which actions are important to business success?
What actions are highlighted in the review?
Which group do we target?

Sometimes the action to change is obvious. You already know what you want to improve, start or stop. Other times the action is hidden. You need to take a deeper look into the data and the problem to discover it. Deeper actions are usually revealed in the diagnose phase. You'll quickly discover that the problem is in a different area that you originally thought. What's important about picking an action to influence is just starting. Use it to set out the project aims and kickoff. You may need to come back to this step once you learn more later.

Identify other actions

Behaviour is made up of a chain of actions. People don't act in isolation. Their action is usually at the end of a long set of decisions and actions. You need to look outside the initial interaction to other things that may be happening.

- Who is supporting or hindering the action?
- What are they doing?
- What other actions could the user take?
- What other systems, rules or artefacts are used that may influence people?

These questions will start to define the information you will use to create a behaviour map later on.

Phase 2: Diagnose

Once you've pinpointed a behaviour, you need to understand it. Really understand it.

Ask yourself:

Why are people doing it, or not doing it?
What factors are influencing people?

Map hidden influence and drivers of behaviour using the Drive model. Drive is used in a number of BehaviourStudio's design tools. Using it you will understand what is

happening, why and to who. The two main tools we'll highlight are behavioural archetypes and behaviour mapping.

It's useful at the end of this stage to reflect back on your behavioural objective. Things change. It's important to check you haven't veered off target, and if necessary, to update the behavioural objective to reflect your new insight.

Step 3: Create behavioural archetypes

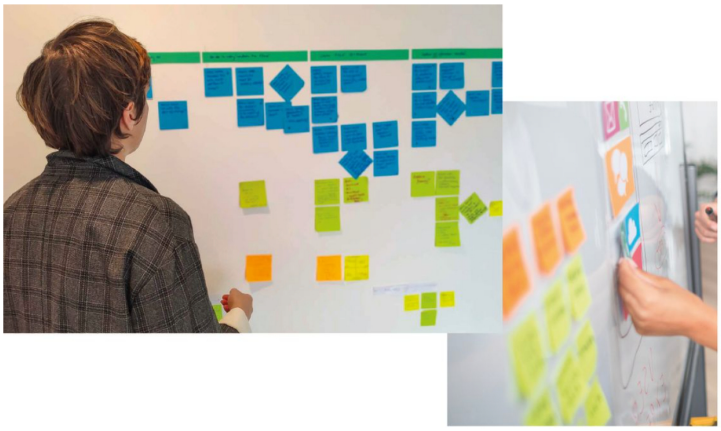
Identify who is influenced by the action

Behavioural archetypes act as a profile of the people doing the behaviour. They expand on other profiles you may have seen in marketing and UX by including Me factors from Drive. They don't represent an individual, instead they document a group of people who have similar patterns of behaviour. Behaviour is a series of set patterns. Separate individuals can act with autonomy, but share the same cause and effect actions. These patterns are useful, as they help us define who is acting on a deeper level. Moving away from one person, to people. The people doing the action. Each product or service has a number of archetypes. It's important to understand who they are and what drives them.

Explore who the people are that are influenced by the action. Remember, behaviour happens outside the interaction as well as within. You need to define who is doing the action and who is influencing it. It may not be your direct user.

Ask yourself:

Who is the person doing the action?
What do they feel?
What are their needs?
What do they plan to do?
What are they driven by?
What do they think they can do?
Why don't they currently do it?
What cognitive biases do they have?



Step 4: Behaviour mapping

Now we transition from who to what. Once you know who is doing the behaviour, you need to understand what they are doing. Step by step. A behaviour map is very detailed. And they take up a lot of space. Prepare a big research wall for all your post-its. Every step no matter how small is plotted. Start with the big steps and then dig down into what makes up that step.

Ask yourself:

What is the entry point?
What is the goal/end action?
What are people doing?

Start by plotting the start and end point. It will help you fill in the steps. Once you have plotted what people do, start thinking about the other factors that drive people.

Define We drivers.

- What are other people doing?
- What influence do they have on the action?

Define Oversee drivers.

- What other artefacts do people interact with?
- What other information are they seeing and interacting with?
- Where are they? And how can this influence their actions?
- What are the rules and regulations that people follow?

At the end of this step you should have a complete picture of the target behaviour.

Step 5:

Behaviour diagnosis

To understand a behaviour, you need to reveal hidden influence. The factors that inform what people do - usually without them even realising. Take a deep dive into each step and diagnose what may drive people's actions.

Ask yourself:

What do people encounter in their environment?
How do others influence them?
What expectations influence them?
What norms exist that influence them?
What physical barriers stop people?
What rules do people follow?
What conflicts stop people?
What information do people see?
What biases influence people?

Break these down into push and pull factors. What factors push the behaviour forwards? And what factors pull against it and make it harder to do? Your aim is to maintain push factors in the design phase, and design to overcome pull factors.

Use the 3 Drive factors, Me, We and Oversee, to break down the factors that influence people. It's useful to use different coloured post-its to differentiate between them later on. Add references to data or insight from your literature review to back up how the factor is influencing people. This is useful for later documentation.

The behaviour map and behaviour diagnosis are important steps. They pull together all the insight and define what people are doing. It's a tool that will help you and your team visualise hidden influence.

Phase 3: Design

Step 6:
Prioritise factors

You'll start the design phase with a full behaviour map, countless pull factors and many

You'll start the design phase with a full behavioural map, countless pain factors and many areas to turn into solutions. You need to prioritise. Realistically you'll only be able to target one or two factors. You have to choose the areas with the most impact.
Behaviour Design isn't about designing the entire experience. It **focuses on a few key areas**. Areas that when changed will have a global positive effect on what people do.

Ask yourself:

What factors have the biggest impact on the step?
Which step has the biggest impact on the behaviour?
Is it easy and within our means to fix?

Tip

Be aware of choosing target factors based on:

1. **Mistaking outcomes for behaviours.**
   Outcomes represent large scale actions. They are usually the big aims you are trying to achieve. E.g. *Increase the amount people save* is an outcome. *Start big payday spenders saving by getting them to add 5% of their pay check to a savings account on payday* is a target. Think, can I measure the specific actions of this step? If you can't then you are looking at an outcome. You need to break it down further.
2. **Focusing solely on the people you want to help.**
   You want to help your user, so you focus exclusively on what they do. But, behaviour is more than what the individual does. It may be that someone else in your map has a big influence on what people do. This is the network effect. Some people are in the middle of the web. Look and find these people and you'll have a positive knock-on effect. Target them instead.
3. **Stakeholder influence.**
   We all have stakeholders. And projects need to have a return. But, be mindful that this doesn't sway what target you select. There may be other steps that have a bigger impact on people's global behaviour, and in turn a positive gain for the business. Try to explore these as well.
4. **Biiiiig aims.**
   Behaviour change is about taking small steps. You'll know if your aims are too grand when you start building your behaviour map. If it gets too complicated, with too many factors and divers then you need to look back at your behavioural objective. It may be that one of the new steps you have identified is your true behavioural objective. Back up, update and restart the process.

Step 7: Identify tactics

This is behaviour-backed design. You will use strategies and tactics from behavioural science to create solutions. With many theories to potentially use, you need to select the right ones. Audit potential tactics based on the project requirements.

- What are people doing?
- What do you want to achieve?

To select tactics reflect on the 9 business behaviour goals. Each goal has a collection of

strategies and tactics to choose from. As to which, well, I have to hold back some cards. If you are wondering how to connect goals, strategies and tactics, ask me at lauren@behaviour.studio. I offer consultancy and training too.

1. Grab attention
2. Remove obstacles
3. Motivate activity
4. Maintain momentum
5. Make it easy to think about
6. Make it easy to assess options
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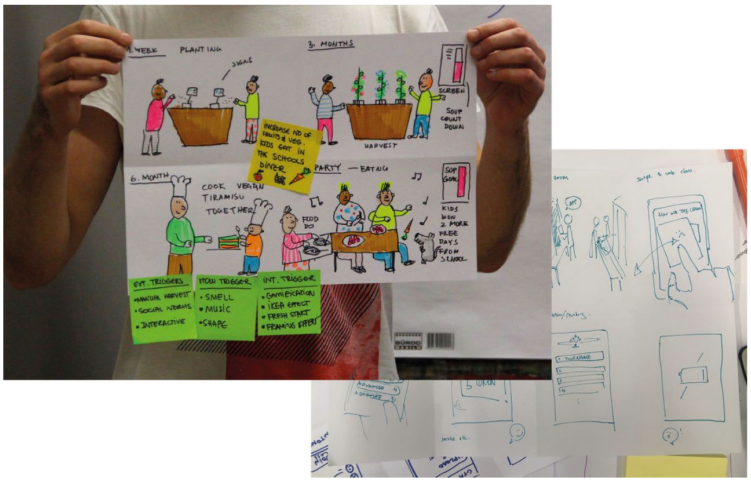
Step 8: Develop solutions



Developing solutions follows most creative and idea generation activities. One small difference, we use the tactic from step 7 to develop an intervention.

Phase 4: Demonstrate

Step 9: Experiment

Project success only comes from improving people's behaviour. Experiments let you know if they work.

Behavioural experiments share most User Research practices. You write a hypothesis, create the conditions to test and randomly assign participants to each group. You observe and record what people are doing in response to your solutions.

The main difference is how experiments are structured. They are defined in three parts, before behaviour, during and after.

Behaviour research is centred around using random control trials, which are basically A/B tests by another name. The only difference is that RCT conditions can be set wider than changing one element within an app or service. It can look to changing environmental factors instead. A basic RCT has two conditions. A test condition where only one variable is changed and a control - a condition where nothing is changed. People are randomly assigned to either condition. They aim to capture people's actual behaviour without the influence of bias.

Before and after analysis help to assess what people are doing and at intervals afterwards. If you can, test where the behaviour happens. People act differently outside of a lab. You want to capture their most likely behaviour.

Behavioural research also uses interviews, field studies, ethnographic research. The aim is to understand the customer, to uncover their needs, pain points and behaviour. Remember to look outside the user, to their community, society and context.

Phase 5: Deliver

Launch away. And change the world. One behaviour at a time.

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