Affinity Mapping

A How-To For Better Team Alignment
ProductCamp > ONLINE™

Standard Beagle

Everything you need to know
u10.me/pco

About Me

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What We Will Cover

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What, Why & When to use Affinity Maps

02

How To Make An Affinity Map

03

How to Moderate a Session

A Magical Tool

Affinity maps are really cool!

" The real voyage of discovery consists not in seeking new landscapes, but in having new eyes."

-Marcel Proust
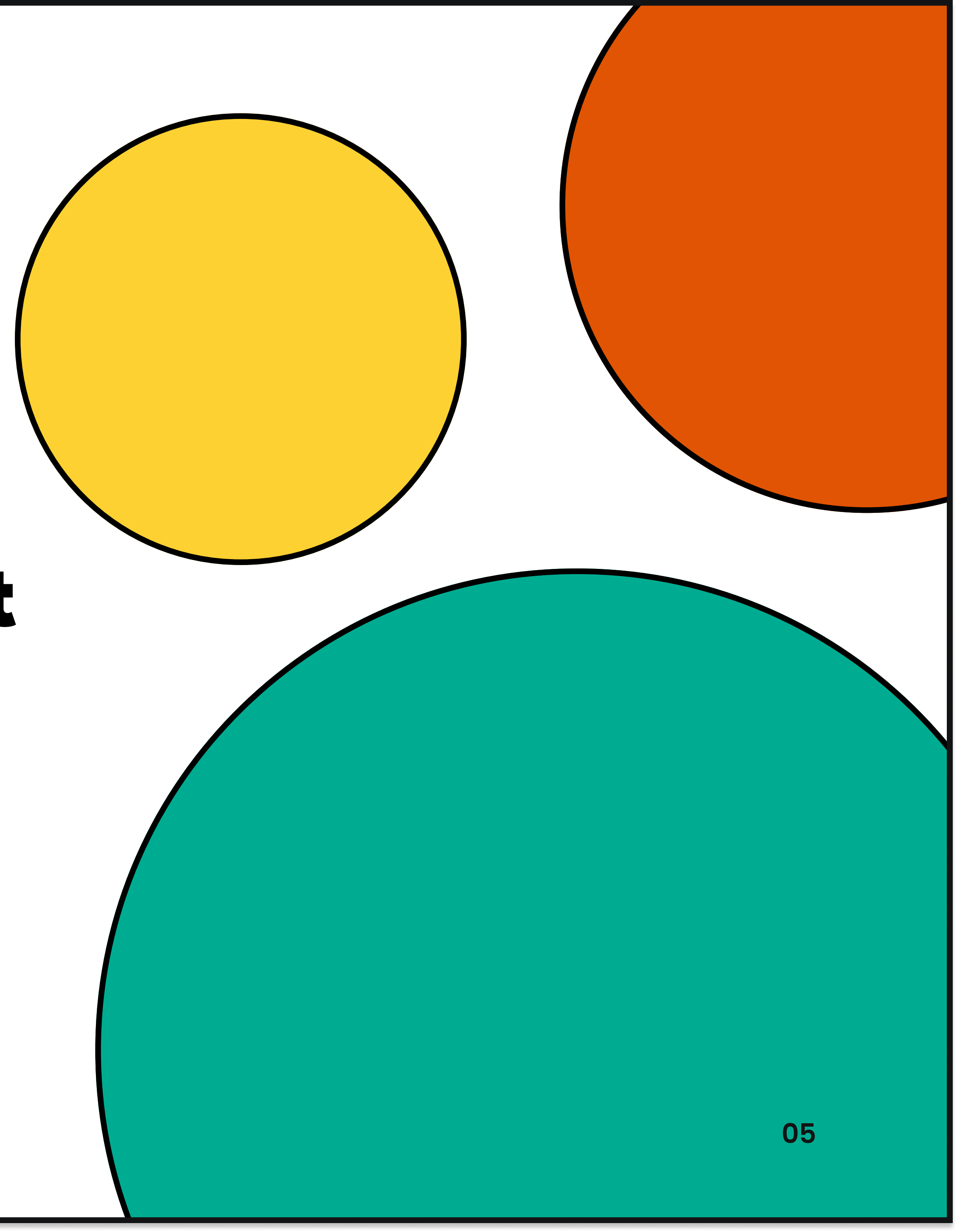
What is an affinity map?

Hint: Your tool for creating ah-ha moments

Clustering exercises

Group and bundle ideas into natural relationships. Large amounts of ideas and data are clustered for analysis.

Making sense of data

Data can be from mixed sources -- comments, interviews, ideas, survey responses, or other qualitative data.
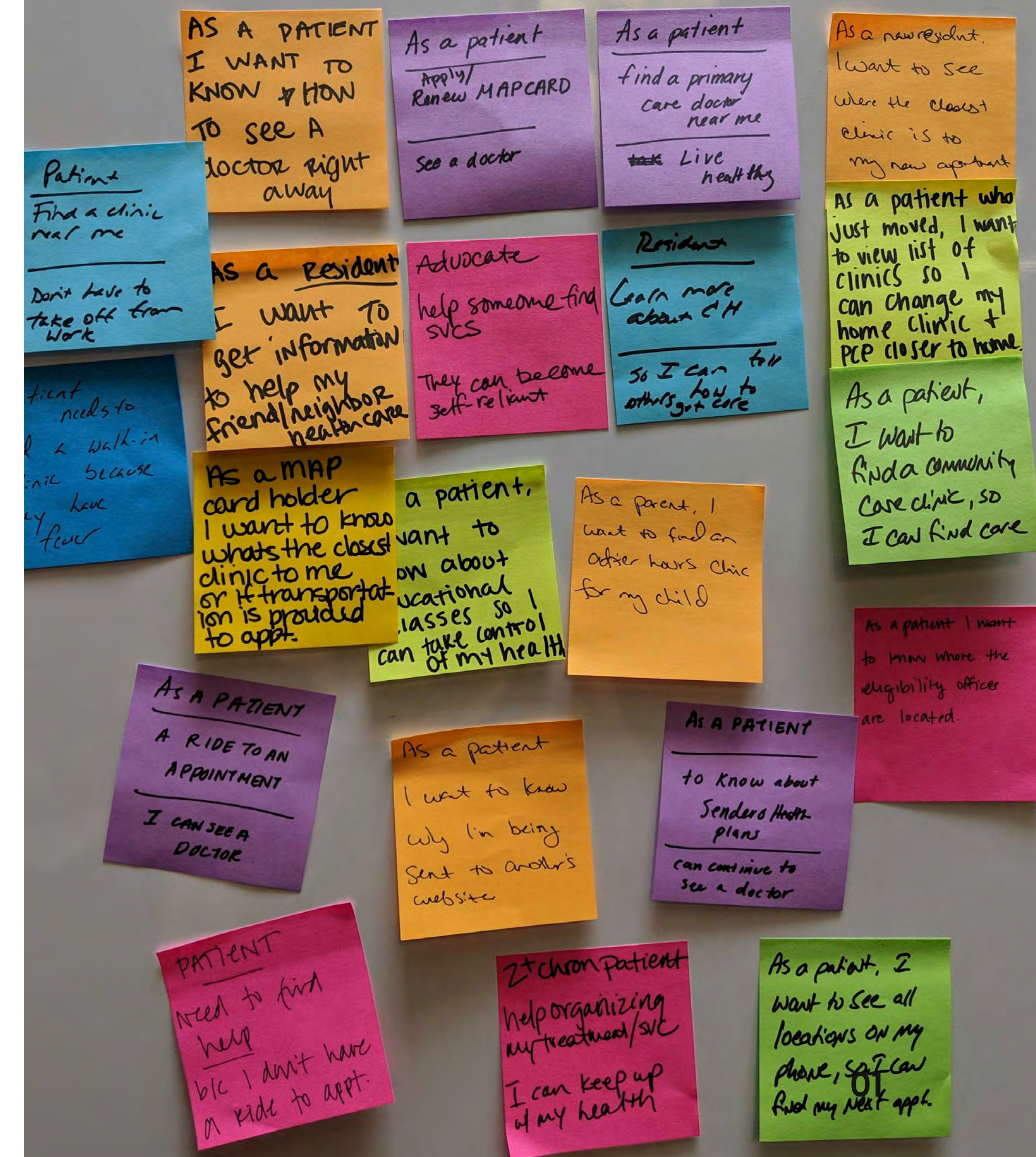
What is an affinity map?

Hint: Your tool for creating ah-ha moments

Idea generation tool

An affinity diagram was originally developed in the 1960's by Japanese anthropologist Kawakita Jiro. It's used to organize ideas and information to connect and form a thinking model.
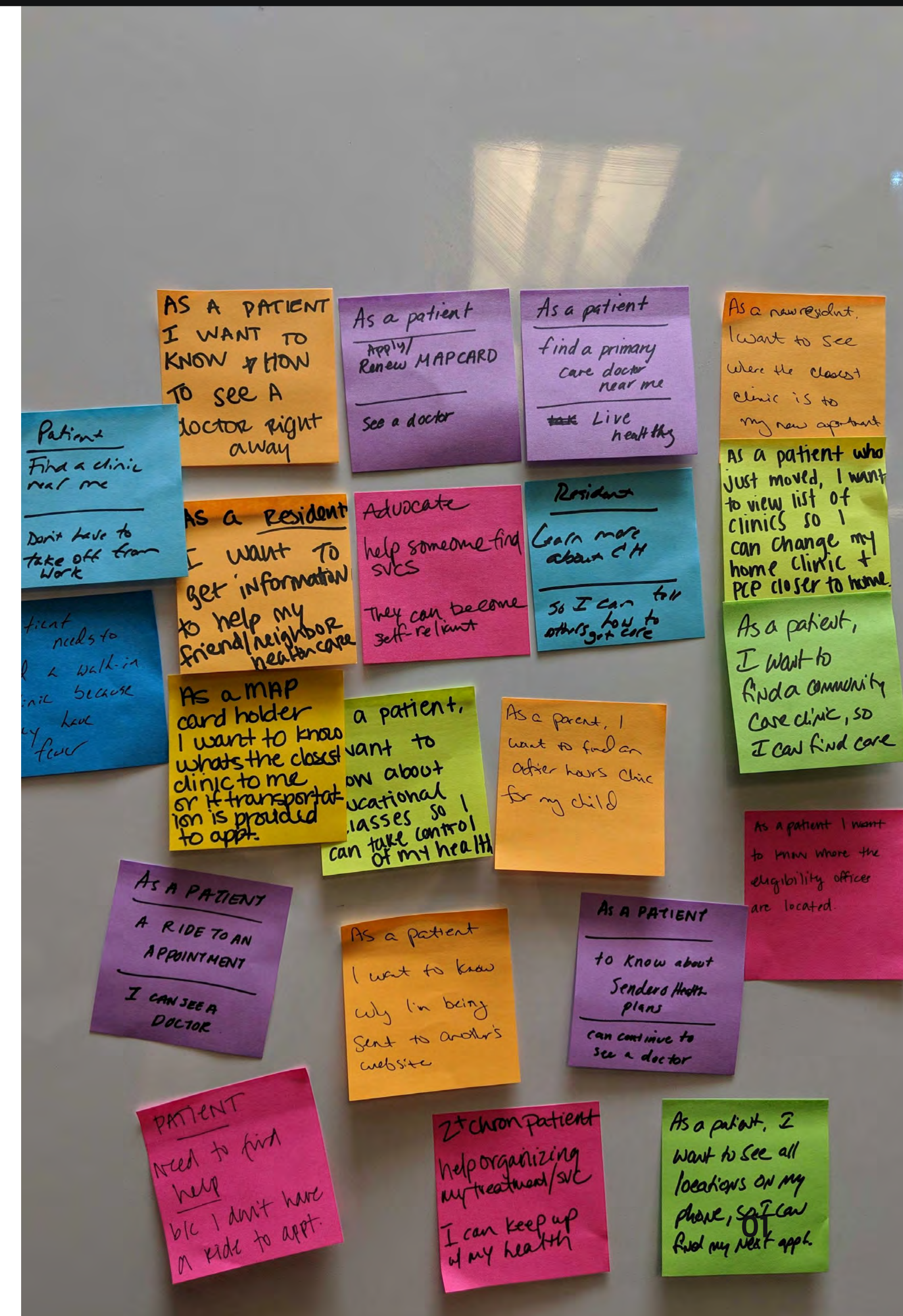
What's Included?

Elements of an affinity map

Purpose

What's the focus for the affinity map? Each affinity map should have an objective.

Leader

A successful affinity mapping session has a good facilitator.
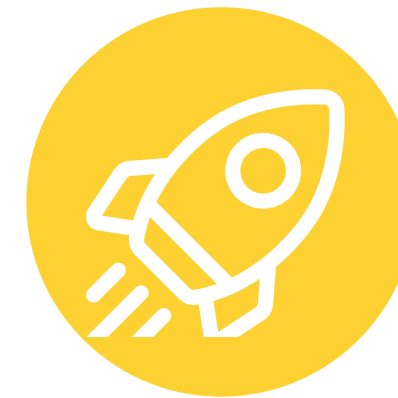
Prepared Space

The team that creates an affinity map needs a place to create the clusters.

Content

Affinity maps can be used to organize data or ideas from a brainstorm.

Affinity Map Example

What it Looks Like

Affinity Maps Include:

- Variety of data
- Grouping of information
- Category labels

Why Use It?

Affinity maps help us recognize patterns

Strengths

- Simple
- Involves every team member
- Creative and analytical
- Makes work visible
- Promotes critical thinking

Why I Love Affinity Mapping

See Insights You Wouldn't Otherwise See
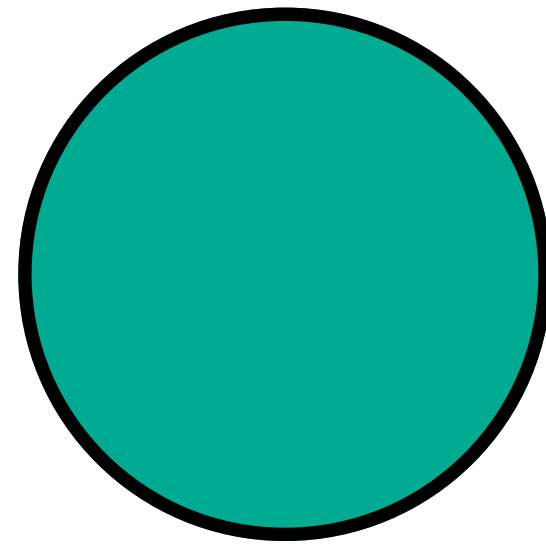
Pattern Discovery

Affinity Maps help us see patterns we don't otherwise see.
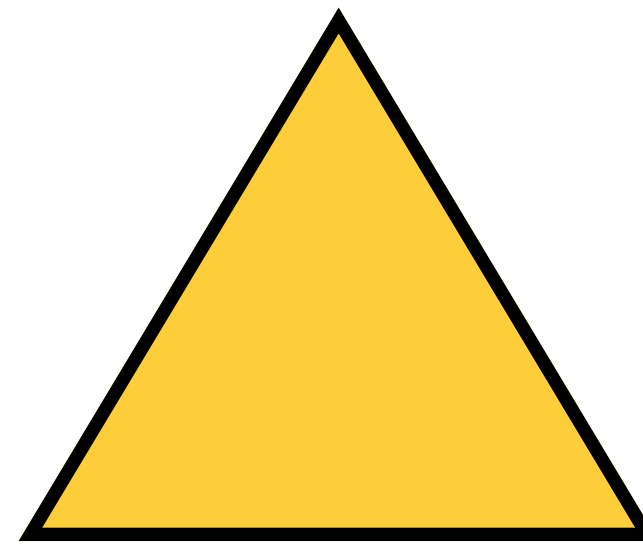
Dig Deep

By externalizing thoughts and data, we can probe deeper.

Simple & Inexpensive

Rather than use complex AI tools, we can use the most powerful tool of all -- our brains.

When to Use Affinity Maps

So Many Options, So Little Time

Where Do You Need A Better View?

Because affinity maps help us see the big picture, they are a great way to look at a situation with greater detail.

This means you can use them in a variety of situations.

Stakeholder Alignment

Affinity Map example

Get Stakeholders on the same page

When you work on a project with a lot of voices, affinity mapping can be helpful for aligning stakeholders.

Customer Discovery

Affinity Map example

Learn from customers

Customers don't always tell you exactly what they want. Sometimes you have to read between the lines.
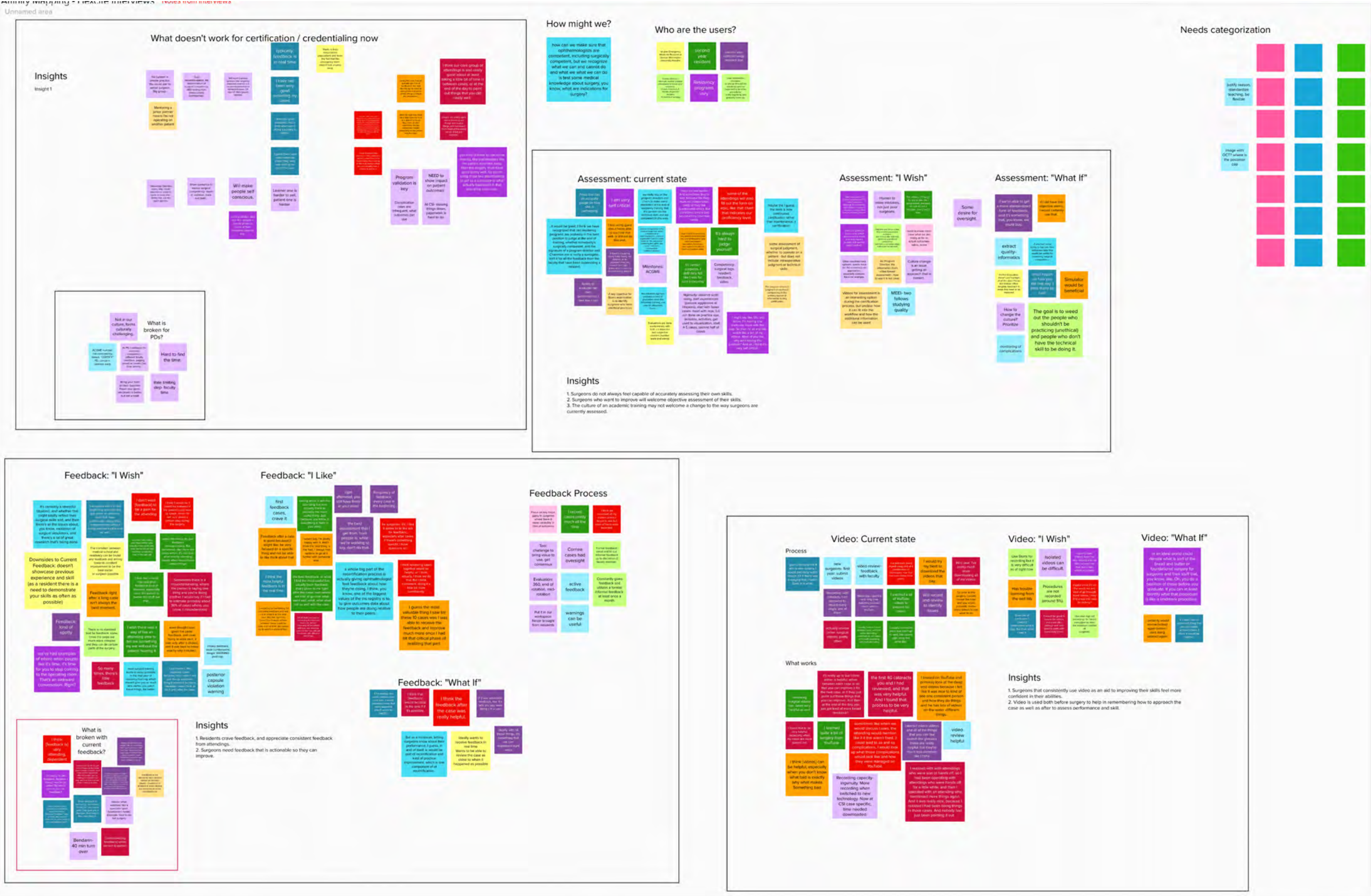
User Research

Affinity Map example

Find the pain points

Affinity maps are helpful through the research process. You can combine survey data, observations, desk research, and interviews to start making sense of the data.

Team Brainstorm

Affinity Map example

Unite your team

Affinity mapping exercises are the great equalizer. They ensure that every voice on the team can be heard.

Exercises like this can help pull ideas out of the team and put them front and center.

They're also fun!
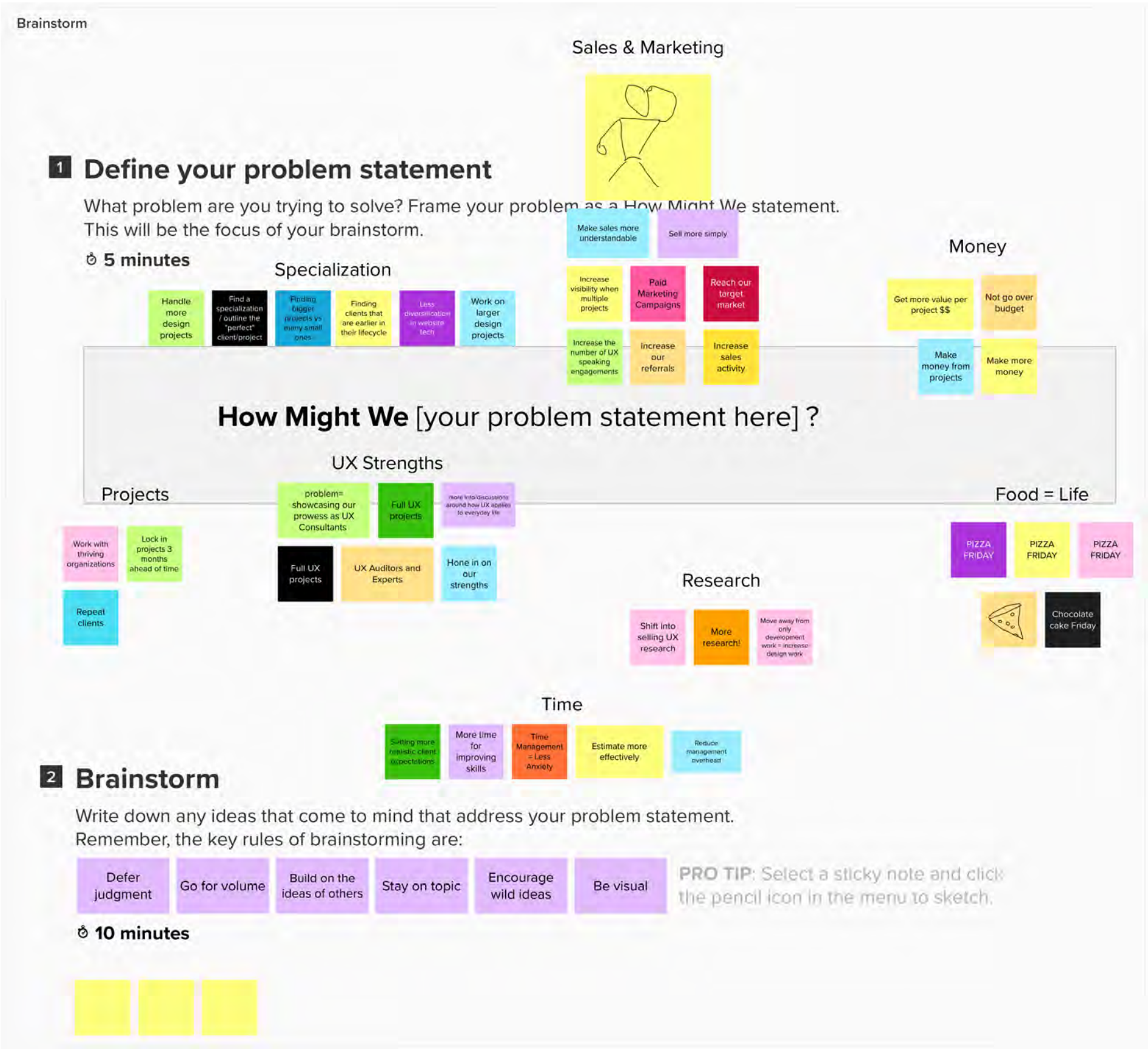
How to Make an Affinity Map

Let's Talk Tactics

Make Sure You're Clear on Purpose

What are you hoping to accomplish with an affinity map?

What You Need

Time and Tools

Plan Enough Time

Make sure you give yourself plenty of time. Affinity maps can easily take more than an hour.

Sticky Notes & Sharpies

If you are in a physical space, have plenty of sticky notes on hand and sharpies for writing so you can see your writing from a distance.

Virtual tools like Miro and Mural are also a great option.

Large Whiteboard

Your whiteboard can be physical or virtual. You can also use a wall or table -- you just need a space to spread out.

Dot Stickers

Dot stickers let teams vote on key ideas -- very useful for brainstorming!

Miro and Mural also have "dots" you can use for voting sessions.

Affinity Mapping Preparation

Here are the steps to take to get started

Assemble Your Team	Select a Facilitator	Determine a Purpose	Gather Your Data	Find a Space to Work

Be Diverse

A diverse team helps bring different ideas and perspectives.

Facilitator Skills

A good faciliator sets the tone for the session. It's critical this person be right for the job.

Use Cases

Affinity mapping can be used for multiple purposes.

What are you trying to learn?

Prep Data

Break down the data into pieces:
  • Highlight interesting points

Online or In-Person

Find a place where you can spread out your ideas:
  • Wall
  • Whiteboard
  • Table
  • Online software?

Be a Good Moderator

It's An Important Job

Be a Listener

A session moderator should have good people skills and have some empathy -- this includes great listening skills.

Have Some Presence

The moderator should have some natural presence or authority so that everyone pays attention to them as they guide the activity.

Stay Objective

A moderator must stay neutral so that they don't become a voice that sways the session.

Add Ideas / Data

Step 1

Break Out Those Sticky Notes

It's up to you how you use color. Some teams use it to show different types of data, people, or team members.

One Idea Per Sticky

Add one idea per sticky note. Give yourself enough time to do this if you're working with a lot of data!

Get all of the ideas out -- now is not the time to filter.

Group Ideas

Step 2

Use Silent Sorting

Wait until all of the ideas are on the table before starting this step.

Keep Looking for Patterns

It's OK to come back to this step again and again. Sometimes patterns take time to be uncovered.
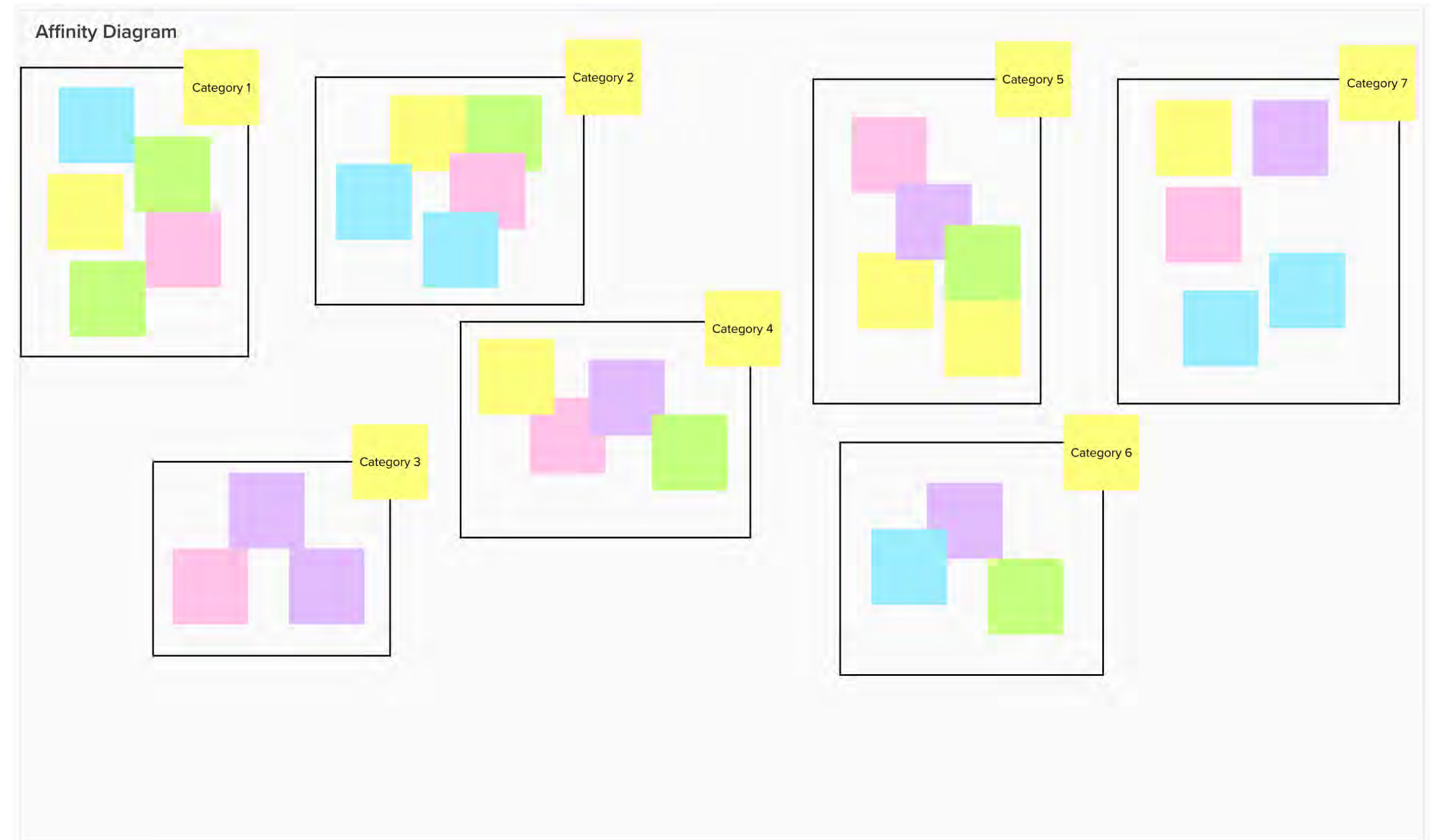

Affinity Diagram

Categorize Groups

Step 3

Label the groups

Draw boxes or circles around the groups and give each one a label.

Capture the Data

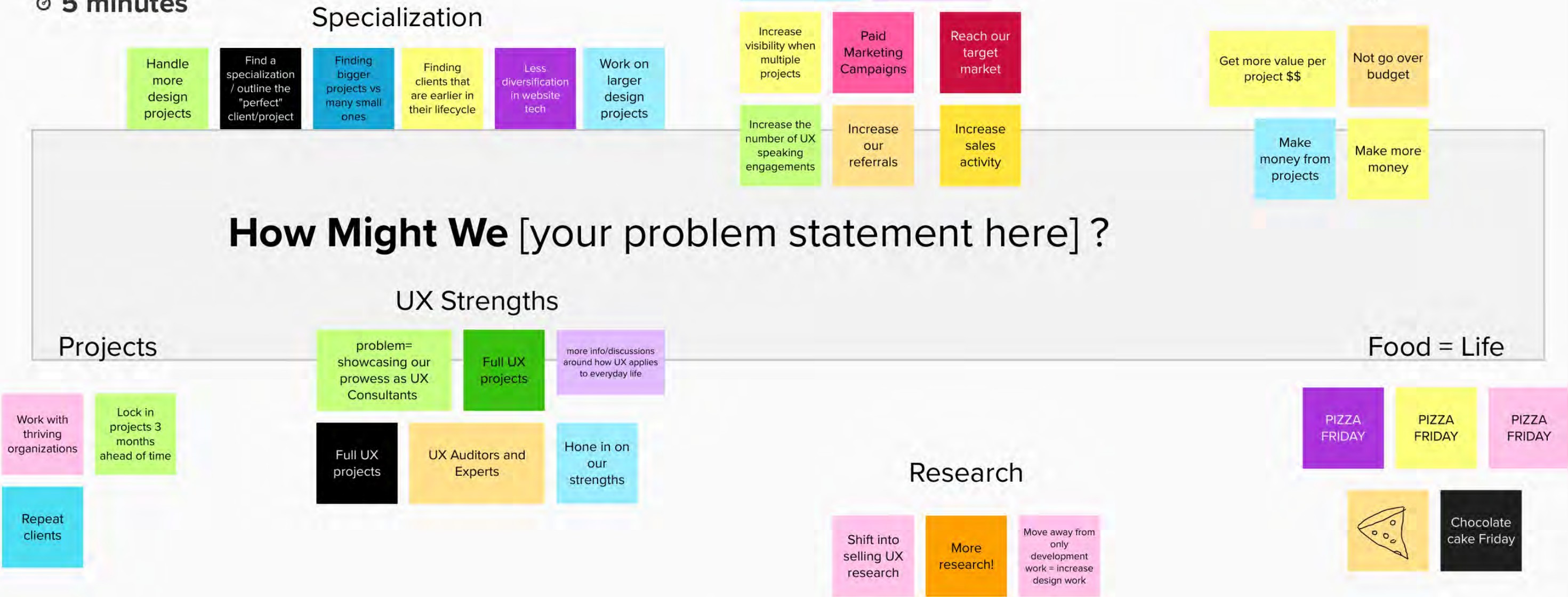Take a picture or export the map so you have it to refer to.

Sales & Marketing

1 Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement.
This will be the focus of your brainstorm.

⏱ **5 minutes**

Make sales more understandable	Sell more simply

Increase visibility when multiple projects	Paid Marketing Campaigns	Reach our target market
Increase the number of UX speaking engagements	Increase our referrals	Increase sales activity

Money

Get more value per project $$	Not go over budget
Make money from projects	Make more money

Specialization

Handle more design projects	Find a specialization / outline the "perfect" client/project	Finding bigger projects vs many small ones	Finding clients that are earlier in their lifecycle	Less diversification in website tech	Work on larger design projects

How Might We [your problem statement here] ?

UX Strengths

problem= showcasing our prowess as UX Consultants	Full UX projects	more info/discussions around how UX applies to everyday life
Full UX projects	UX Auditors and Experts	Hone in on our strengths

Projects

Work with thriving organizations	Lock in projects 3 months ahead of time
Repeat clients	

Food = Life

PIZZA FRIDAY	PIZZA FRIDAY	PIZZA FRIDAY

	Chocolate cake Friday

Research

Shift into selling UX research	More research!	Move away from only development work = increase design work

Time

|				
Setting more realistic client expectations	More time for improving skills	Time Management = Less Anxiety	Estimate more effectively	Reduce management overhead

2 Brainstorm

Write down any ideas that come to mind that address your problem statement.
Remember, the key rules of brainstorming are:

Defer judgment	Go for volume	Build on the ideas of others	Stay on topic	Encourage wild ideas	Be visual
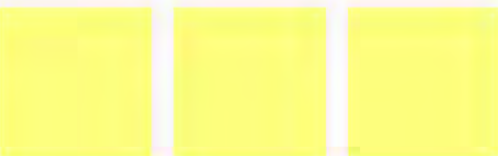
PRO TIP: Select a sticky note and click the pencil icon in the menu to sketch.

⏱ **10 minutes**

Feature Ideas

UI Dashboard

- dominos progress bar
- progress bar for video analysis
- Upload box for new video
- program director dashboard
- anonymous submission option
- Track how user is interacting with the screen
- pupil tracking

- 3 tiers for reporting -- group features based on tiers

Reports

- Notification bell or email sent after new assessment entered
- Comparison report to other surgeons nationwide – benchmark
- performance score card
- Ability to flag reports
- Ratings over time
- Download certified report for credentialing board
- Set preferred report
- color coding report card- green/red
- Menu to see all reports
- My story
- link to video examples
- Run report for ACGME

Sharing features

- have an "attending" viewpoint- these are your frequent errors, you need to pay attention
- share report on social media?
- Email report to myself
- Allow surgeons to tag "pearls" for traineeds- increase buyin
- able to share clips
- send report
- Share report with someone

Video Processing

- Drag and drop or upload video
- ability to see source video
- de-identify videos
- privacy
- Repository of example clips- tagged with feedback

Reviewing video

- Add tags to video
- Show me what I need to talk to my attending about
- Add my notes - text or voice
- Show me videos with similar notes I wrote
- Add my caselog information (notebook)
- Mark my video for review with attending
- Save to a specific folder
- Star videos

Profile

- Create a user profile
- Edit profile
- Group users into cohorts / join cohorts
- Create a super-user profile
- Create institution profile

Time

- tracking time it takes to do surgeries
- time assessment
- performance over time
- Analysis of ratings over time

Personalization

- My assessments screen
- Comment section on progress
- abiltiy to see video segment linked to assessment
- Screen to see past videos uploaded
- reminder for useage
- Competency target numbers
- Create folders
- Ability to see common trends for improvement
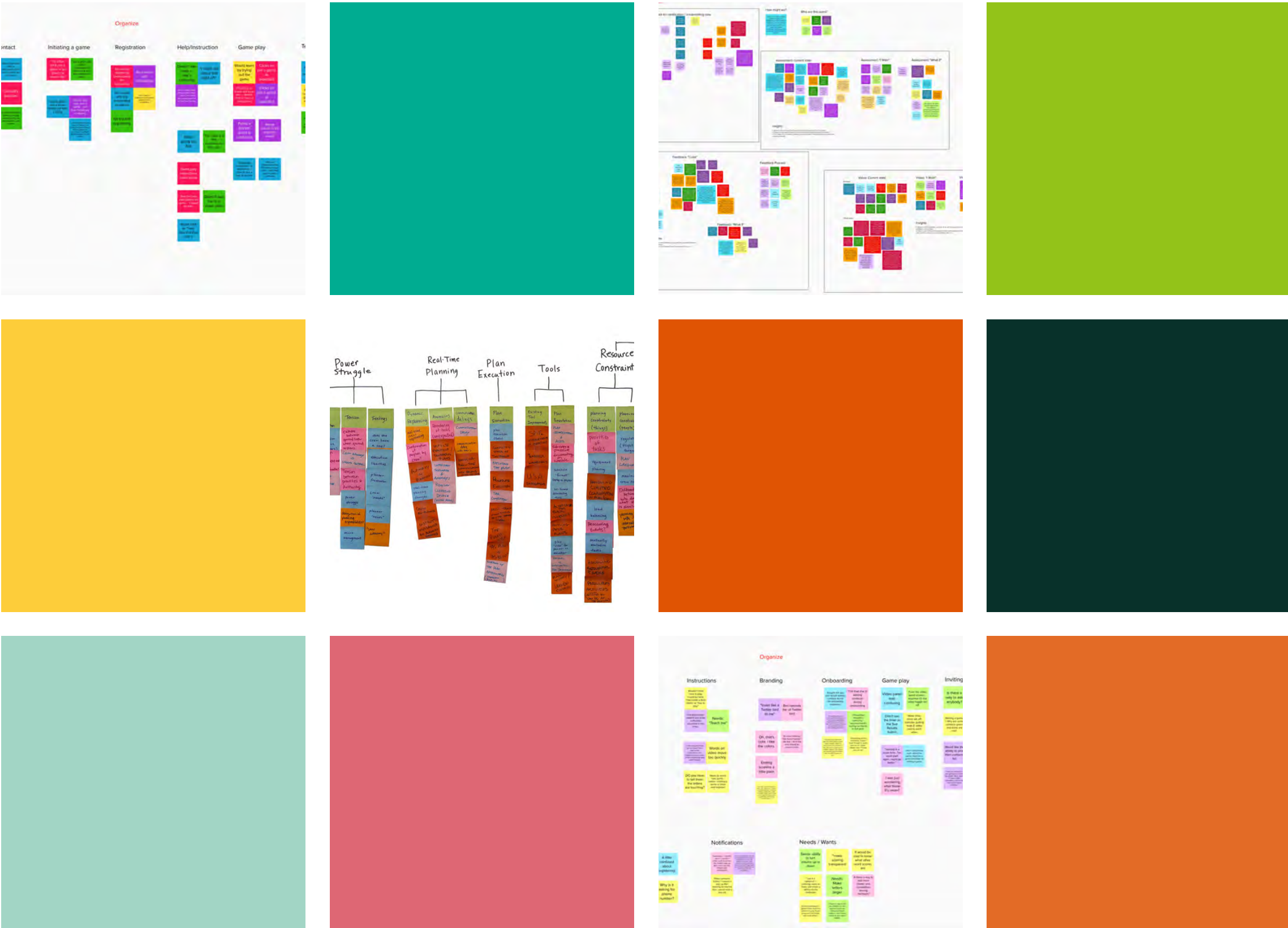
gamification

- Send reminders
- scoreboard
- Streak
- badges on performance

Remote Considerations

Online is not the same as in-person

Pay attention to moderation

Good moderation is even more important online. Online distractions can prevent team members from fully participating or being engaged in the process.

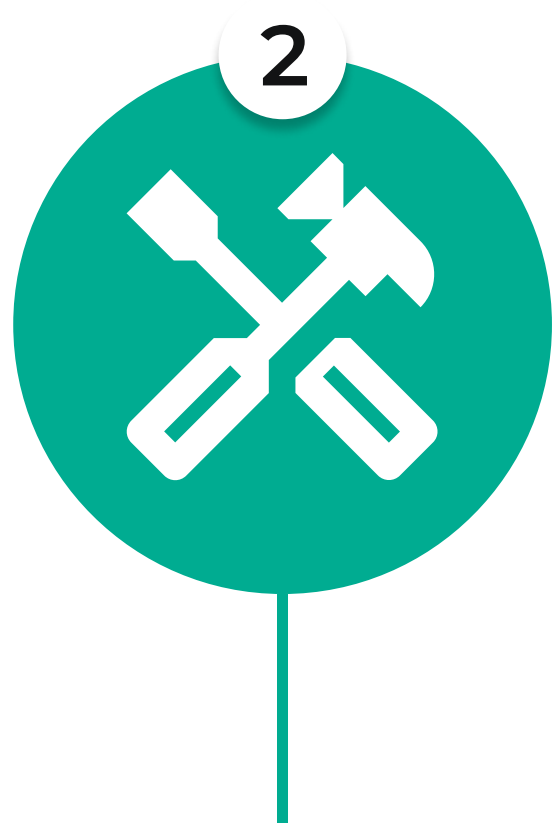Be sure to keep the activity moving so that team members don't check out.

Remote Considerations

Be Mindful of the Medium

1

Tools

There are many tools you can use to conduct sessions. Miro and Mural both make this an easier process.

2

Training

Always be sure to practice with the tool a few times so you feel comfortable with it. Don't learn a new tool on the fly.

3

Set Expectations

Let participants know your expectations for enagement. Ask people to turn off distractions if needed.
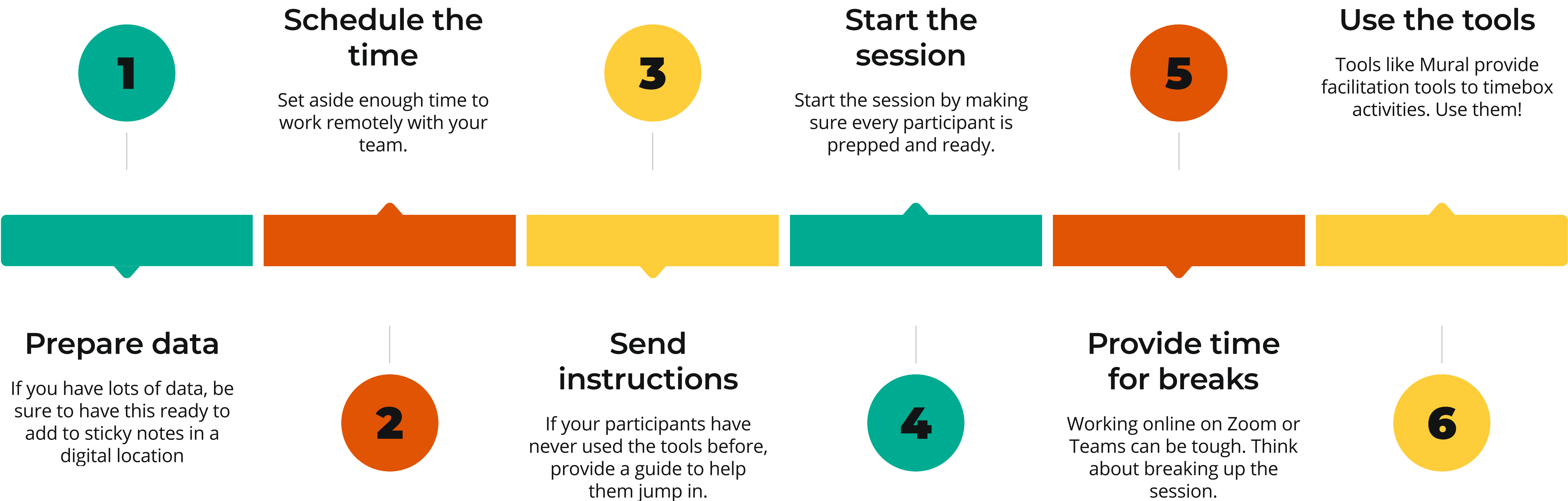
4

Be Prepared

Some session may require prep work. Be sure to have data, notes or guidelines ready ahead of time.

What to Adjust

Remote Tactics

1

Schedule the time

Set aside enough time to work remotely with your team.

3

Start the session

Start the session by making sure every participant is prepped and ready.

5

Use the tools

Tools like Mural provide facilitation tools to timebox activities. Use them!

Prepare data

If you have lots of data, be sure to have this ready to add to sticky notes in a digital location

2

Send instructions

If your participants have never used the tools before, provide a guide to help them jump in.

4

Provide time for breaks

Working online on Zoom or Teams can be tough. Think about breaking up the session.

6

"The noblest pleasure is the joy of understanding."

-Leonardo da Vinci

Any Questions?

Q&A Time!

#11_design-thinking_user_experience
_ui_ux_ixd

Thank You!

Contact Me

- standardbeagle.com
- linkedin.com/in/cindybrummer/