Understanding Customers’ Needs, Values and Experiences  
Fall 2015

Deeply understanding people -- their needs, anxieties and aspirations -- gives you, as a designer or entrepreneur, the tools to make their lives better.

This aims to teach a set of very practical methods and skills for deeply understanding customers, and for turning that understanding into insights that can drive your innovation efforts, whether for your own start-up venture, for a non-profit organization, or for a large corporation.

This unique class comprises three one-unit modules that meet 3 hours a week for 5 weeks each and can be taken separately or together. If you take all three, you may apply them to a project of your choosing and integrate the work you do across the courses in a fourth module for an additional unit. Modules A, B and C will be offered on Thursdays from 2-5 p.m. in the Innovation Lab at the Berkeley Stadium. The schedule for Module D will be determined based upon demand.

This is a unique opportunity to meet a set of leaders in the design community. Sara Beckman will serve as the integrator for the three courses, and will coach students who wish to take all three and do an integrative project. Michael Barry (Module A), Armin Moehrle (Module B), Rachel Orth (Module B) and Valerie Peck (Module C) are all seasoned designers who will bring their perspectives from the applied world of design to the class. You will find all of their bios below.

Module A (UGBA 190T-2A): Understanding Customers: Conducting Customer Interviews (August 27th – September 24th)
The first module will teach you the fundamentals of conducting a good customer observation and interview. You will learn how to ask the right questions, how to make your interviewee comfortable, how to extract interesting stories. You will learn what to look for in an observation, how to approach people to ask questions, and how to bring that data back to a team for analysis. These skills are at the heart of both design innovation and the lean start-up process.

Michael Barry, Founder, Quotient Design Research and Faculty, Stanford d.school
Michael is an accomplished engineer and product designer with dozens of patents under his belt. Michael now teaches design thinking at his alma mater, Stanford, and is often regarded as a coach by those around him. His clients include Sony, IBM, Kimberly-Clark, HP, Merck, Intel, Shure, Johnson Diversey, Sony Ericsson, Nestlé, Wells Fargo Bank, Wrigley, Deloitte, Chrysler, Panasonic and Unilever. He has worked in China for the past 15 years conducting consumer research for intimate care, consumer package goods, and high technology companies. He is a Consulting Assistant Professor in the Mechanical Engineering Department at Stanford University (the d.School), teaching Needfinding and Cross Cultural Design in China.

Module B (UGBA 190T-2B): Understanding Customers: Extracting Values from Behavioral Data (October 1st – October 29th)
The second module focuses on helping you extract customer values from interviews and observations. People make choices. If you want people to choose the solution you are developing, you have to understand the patterns behind these choices. Traditional methods of market research fail because people are not aware of the patterns of their choices. Social anthropologists are experts in observing people in their natural environment and revealing the socio-cultural values that choices are based on. In

Module C (UGBA 190T-2C): Understanding Customers: Using Ethnographic Methods to Frame Questions (November 18th – December 16th)
This module will teach you how to use ethnography as a tool to understand customers and develop better questions. Ethnography is a research method that involves spending time with people in their natural environments to understand their behaviors, motivations, and challenges. You will learn how to use ethnography to inform your design process and generate insights that can drive your innovation efforts.

Sara Beckman, Integrator and Coach
Sara is an experienced designer with a background in social anthropology. She has worked with a variety of organizations to help them understand their customers and develop better products and services. Sara has a unique ability to connect with people and help them see the bigger picture. She will be the integrator for the three modules and will coach students who wish to take all three and do an integrative project.
human-centered innovation practices, social anthropologists observe people at home, work and play to reveal unique product, communication or business opportunities. The behaviors people reveal are often visually documented in form of videos or photos. This provides a richer documentation of the behaviors in context for the interpreters of the data and for the product decision makers. Ideally the documentation is done in a minimally obtrusive fashion and the interpretation is done in a transparent, objective and reproducible fashion.

Armin Moehrle, TOCA Principal
Armin has 15 years of experience in helping organizations understand what customers and employees value and translating these values into business opportunities. As the co-founder of the innovation consulting firm TOCA, he has led engagements for many global Fortune 500 companies. At TOCA, Armin is leading a global team of sociologists, business planners, designers and engineers who help organizations maximize their returns on innovation and change initiatives. TOCA works with clients to make communications more effective, products more successful and operations more streamlined. Before co-founding TOCA, Armin was an innovation planner at Motorola where he defined internet-based interactive media services. Armin earned a M. Des. degree from the New Bauhaus (Institute of Design) of the Illinois Institute of Technology in Chicago where he focused on revealing and translating socio-cultural values into business values.

Rachel Orth, TOCA Director of Research
Rachel draws upon 15 years of experience in applied anthropology to bring rigor and depth to the socio-cultural value systems that drive people’s choices. Her vast experience in ethnographic research and objective hermeneutic analysis provides the rigorous and scientific foundation to the design concept and refinement process. She has led innovation and design research projects that span numerous industries and geographies around the world to increase the adoption rates of digital and tangible interventions, uncover behavioral dimensions of the market, and develop long-term strategies for multinational clients. Rachel holds a B.A. in Cultural Anthropology from the University of Utah and an M.Phil. from Oxford in Modern Middle Eastern Studies. She received distinctions both for her graduate work in social anthropology and thesis ethnography on the impact of privatization on political and economic equality in Morocco. From 2006 to 2009, Rachel taught several introductory courses in cultural anthropology and ethnography at the Salt Lake Community College in Salt Lake City, Utah.

Module C (UGBA 190T-2C): Understanding Customers: Creating Customer Experiences (November 5th – December 10th)
The third module will lead you through the process of developing a customer experience map for your customer. This class will help you understand how to visualize how customers truly view a company. The detailed visualization of the customer experience — it exposes the good, the bad, and the ugly and is used to form the heart of an effective customer experience program. By highlighting what customers do, and the emotions they feel while they’re doing it, journey/experience maps pinpoint the changes that need to be made to realize the greatest impact in the most efficient way.

Valerie Peck, Partner, EastBay Group
Valerie Peck is a noted expert in customer strategy, customer experience and touch point execution. Her tag line, “Where Psychology Meets Technology” sums up a career focused on all aspects of improving the customer experience, from strategy and design to implementation and continuous improvement. Valerie heads up not only her consultancy, East Bay Group, but also a software platform, suitecx®, both of which facilitate the inclusion and visualization of the customer perspective in driving data-driven marketing programs at a one-to-one level.
For over 20 years, Valerie has consulted in multiple industries in many countries. Her expertise has been cultivated from senior roles at PricewaterhouseCoopers, KPMG, Pacific Bell and Peppers and Rogers Group for a wide range of clients such as Limited Group, Inc., Wells Fargo Bank, Hewlett-Packard, Royal Caribbean International and Syngenta. Valerie holds a B.S. in Marketing as well as an MBA from the University of Southern California.


For those of you who are keen to spend a semester deeply understanding a particular customer, whether for your own start-up company or for another organization of interest to you, the fourth module of this class will meet throughout the semester (one hour/week) and facilitate your application of what you are learning in the other three modules to your project. Expect to receive hands-on coaching for your project in these sessions and to have weekly deliverables associated with your chosen project.

*Sara Beckman, Earl F. Cheit Faculty Fellow, Haas School of Business*

Sara teaches courses on design, innovation and product management at Haas including Problem Finding, Problem Solving, which draws from creative problem solving, critical thinking and systems thinking literature. Her recent research focuses on the role of learning style diversity on design teams. For the past two years, she leveraged her teaching and research experience as the Chief Learning Officer of the recently founded Jacobs Institute of Design Innovation in the College of Engineering. Before joining Berkeley-Haas, Sara worked in the Operations Management Services group at Booz, Allen & Hamilton and ran the Change Management Team at Hewlett-Packard. Sara received her BS, MS and PhD degrees from Stanford University in Industrial Engineering and Engineering Management.

**ENROLLMENT**

Please be advised that enrollment for UGBA 190T, 2A, 2B and 2C follows the same rules as for other UGBA classes. This implies that if you want to take courses UGBA 190T-2B and UGBA 190T-2C, you must register for them at the start of the semester even though they will not start until later in the term.

It is recommended that non-Haas students wait list themselves during Phase I. When the Adjustment Period starts on August 17th the Haas Undergraduate Program Office will begin to move non-majors off the wait lists on a space available basis.

The deadline to be added to all UGBA courses is the last day of third week, September 11th. No students are added to courses after this date. The deadline to drop is the same as the rest of campus, last day of fifth week, September 25th.