Bosky

Hi, Teresa, how are you doing?

Teresa

I'm doing great, how are you?

Bosky

I am good. I am good. This is almost like a dream come true and I'm sure that you hear this from every single product person, I've been so much wanting to have this chance to talk to you. So thank you so much for joining.

Teresa

Ah, thanks for having me. I'm excited to do this.

Bosky

Teresa, I think I'm going to start with one question. Your background is fascinating. It's really, really interesting. It seems you've done everything, everything under the sun. You started as a designer, you moved into product, you are an accomplished author, your books are always at the desk of every single product person. We read, in my family, both my husband and I, we read on a regular basis. And you're doing so much work with continuous discovery, so can you tell us a little bit about, I think your journey, what got you into it? What are some of the things that were pivotal in making those big changes and shifts in your career? Can you walk us through a little bit of that?

Teresa

Yeah, so I think if you work long enough, you get to do lots of different things. Also, I spent most of my full-time employee experience at really early stage startups. And so the advantage of that is you get to wear a lot of hats. In my very first role, I was actually hired as an application software developer. So I was a front end developer, but we didn't have any designers and I had a HCI background, so I was doing both interaction design and in front end development. And then in my next job I again was hired as a web developer. This is late '90s, really early 2000's, so UX wasn't really a very common function in product management, even in a lot of organizations didn't exist.

So the way into these companies was to code. And I do know how to code, I still do a little bit of coding today, but I was always sort of on the interface side of things. So my first couple of jobs, I was a web developer and a interaction designer. As UX started to move more towards this interaction slash visual design role, it became less of a good fit for me. I'm not a very strong visual designer. And by that point I was sort getting more interested in the business side of things and moving more into product roles. So I would say I am a human-centered product manager with a design bit, I guess, and in a lot of ways I still do a lot of coding as well. And I think having that background is really helpful because I tend to blur all the different roles. I feel like we should be thinking about the humans on our team and what they're good at and aligning to those strengths rather than having these kind of territorial battles around role.

And then with time I moved into leadership positions. I ran product and design teams at a couple different startups, eventually decided that that wasn't for me. Those are pretty stressful jobs and I was looking for how I could use my sort of special powers to the maximum. And that's really where I got into coaching and that's because I really loved to develop product managers and designers, quickly learned that if you want to coach in those roles, you have to take a team approach, because that's really how we build great products. And then over the last several years have started to design online courses and now product talk is primarily a course first business. So what that means is we don't take on any coaching clients who have not gone through our courses. So we'd recommend that people start with our online courses.

Bosky

Wow. You brought in couple of things, I was making notes, so I'm going to ask some follow up questions. You mentioned that as you went into some of the leadership roles, you realized that was not for you. Maybe it's just me, but usually there is this belief that if you want to climb up the ladder and do well, the people manager track is the track. I think a lot of us, we don't even realize that the IC could be a nice track. Can you maybe talk a little bit about, how did you make that decision that this was not right for you? Because it's so easy to just fall into the trap of following the more common track, right?

Teresa

Yeah, I am definitely a zero to one product person. So I really like to work on brand new products. I really like to dive deep into a customer space, into a opportunity space, and look at how do we create something new to meet these unmet needs. In order to work in that space, most of the time you're going to be at an early stage startup. There is some zero to one work happening in large companies, but I think there's a lot of cultural elements that make that really tough. The challenge with early stage startups is that we tend to get a lot of founders that don't have a lot of business experience, that don't have experience managing people. They certainly don't have experience managing sort of the egos and the big personalities that end up on an executive team. Some are better than others at managing board relationships.

And I think once you're an executive, especially in an early stage startup, a lot of the job is very political. It's, how do you get everybody aligned? There's a lot, especially when you're managing a board, if you have board relationships that are tough. And that's the part of the work I didn't really love. I really just wanted to focus on zero to one products as the companies I worked with grew and my product and design teams grew, I really liked developing products and design people and that's the part of product that I was really passionate about. And unfortunately, I think as you get more senior in an organization you do less of that work. And we need good product leaders and we need product leaders that can navigate that mess, right?

I think one of the most important things startup executives can do is help align the executive team, especially with board expectations, and funding rounds really is what's most important, and really help the company survive. But I did that several times and it's hard, exhausting work and it's just not... I got to a point where it's no longer what I wanted to do. And I realized that I could work on zero to one products in my own business, and that's what I've been doing for the last 10 years. I think it's one of the best decisions I've ever made. I feel like I get to create way more value for the world than I would working for somebody else. I still get to be a zero to one product manager and it's a lot more fun.

Bosky

I love it. I love it, love it. Just tell me a little bit about, I think there were two points that you brought about, and that was the territorial battles, the blurring of the roles. Is this something that you see more is going to happen within the industry, the roles are going to get blurred? Because, I mean, there are a lot of specializations, even when you think in design, even if you think in product, research, at the end of the day when it comes to really deciding what is the right problem to solve, anyone can do it. It's not so much specific to a title, but tell me a little bit, Teresa, I'm really interested to see what are you thinking? Like if you have this crystal ball, where are you seeing the future go? Are you seeing more blurring? Are you seeing more specialization?

Teresa

I really hope we see more blurring. I think specialization has a major benefit. I'm not suggesting people shouldn't develop specialized skills, but I think when we assume somebody in an individual role has a specific skill, we know that's not true. This past weekend I got into this big Twitter battle about, should designers own research, or should product managers own research, or should user researchers own research? I think that even framing is terrible. I've met many product managers who are good at research. I've met many that are terrible at research. I've met many designers that are good at research. I've met many designers that have literally never talked to a customer. I've met some user researchers who have really strong research backgrounds. I've met other user researchers that learned on the job and they know what they've been exposed to and that may not be the strongest research.

So I think it's less about the role and it's more about, on your team who has the skills? How do you leverage those skills? And also how do you do it collaboratively? I don't think design should own research. I don't think product should own research. I don't even think user research should own research. I think we should collaboratively own research. And that doesn't mean I devalue research as a skill. If somebody on your team has a more advanced research skill, we want to leverage that and we want to take advantage of that. I think this role siloing comes from companies wanting to find efficiencies, which in our assembly line, industrial age era made perfect sense. But I think in creative work it's not about efficiency, it's about effectiveness. And I don't think having siloed rules makes us effective. I think blurred rules help more. So I hope we go in that direction.

Bosky

I used to be challenged a lot when I basically went outside of the silos when I was leading my team. So when I had researchers, designers, and PMs on my team, there was always this pressure internally within the organization as to why everyone is doing everything. And it was really about, as you said, who has the skillset, but it was also about, I think, cross sharing within the team so that the team as a whole could improve, and learn, and grow so that collectively we could do a better job.

Teresa

Yeah. I think there's just practical elements here. If we really want to collaborate as a team, we need to have a shared goal. So we already don't see that on a lot of teams. We need to design our strategy together, we need to design our research together. Now if we have someone on our team who's particularly good at research, we want to leverage that expertise when designing that research, but it doesn't mean that we're going to let them do everything. Because what happens when we let them do everything is, what do we do when they're on vacation? What do we do when they're unexpectedly sick?

So the more overlap we have in our skills and abilities, the more resilient of a team we are. And I think team resiliency is an important concept, but also the more we're able to truly collaborate. If one person is the voice of the customer, then that's like a trump card and nobody else on the team gets to have an opinion about what to build because the customer wins. Whereas if we all engage with the customer together, now we have a shared foundation, we're more likely to come to agreement on things, we're more likely to leverage everybody's unique expertise in a way that's going to serve the customer.

Bosky

Absolutely. Now really, really well said, Teresa. Really well said. You brought about another point in the first question that I was asking and that is around coaching. So what I wanted to ask is, over the years, what have you used as, whether it's a litmus test or whether... How do you find out if someone is coachable, or do we believe that everyone is coachable and it is up to the coach to adapt their style?

Teresa

I don't believe everybody is coachable. I think to coach, to be an effective coach, the coachee has a really important role. So one, there has to be an openness to learn, there has to be an openness to explore. I have worked with teams where their leader told them to come to coaching and they had no interest whatsoever. And I can try to be a missionary and sell the why, but it's not effective as an outsider. If your leader isn't internally selling the why, if your incentives aren't set up for you to be motivated to work this way, if everything in the organization is telling you delivery is the most important thing, it doesn't really matter what I say to you. It doesn't matter how good of a coach I am, you're going to do the things that you're incentivized to do that's being reinforced in your organizational culture.

So actually one of the reasons why I started focusing on online courses is I want to help all the individuals that were like me, that worked in a small organization, maybe the head of product was never going to invest in coaching, but they desperately want to work this way. And what's nice about courses is that they're more affordable than coaching. They fit in most people's professional development budget. Any individual can choose to sign up for a course, they don't need their head of product to be bought in. So it's a little bit of a more egalitarian approach, that we lose something with that switch. Right? Coaching is really high value, it's high touch, it's very contextualized. We work in the context of your work.

We still do some coaching, and I think there's a lot of value in coaching, but I also think there's some equity and inclusion sort of challenges with big ticket items like coaching, because really the only people that get access to it are the people that are already at the big successful companies where they have leadership driving the change. So for me, I really want to look at... This is also why I wrote the book, how do we bring these ways of working to more people? And especially people that may not be in a privileged environment to get access to this kind of stuff.

Bosky

Thank you. Thank you. Moving to the book that you've mentioned, can you maybe kind of share with us some of the key highlights in those milestone journey of writing a book? I'm really interested, I'm writing my own book here.

Teresa

Oh, great.

Bosky

It's been awesome, but at the same time I get so nervous and I write, and rewrite, and I remove everything. It's been a journey, so I would love to hear from you, Teresa.

Teresa

Yeah, so my book is Continuous Discovery Habits and it's really about how a team can build in fast feedback loops with their customers as they're making decisions. So everything from what outcome you're going after and which customers you're going to serve, what their unmet needs and pain points might be, to how do we identify the right solutions to build? And the goal of the book is to just give you an end to end framework. Like what might this look like in practice? The reason why I wrote it is because I hear from teams all the time that have never been exposed to this way of working. It's almost like they don't believe it exists. They think it's just something that consultants talk about in this hypothetical world and nobody actually works this way.

And so one of the things I wanted to do was I wanted to share stories of real teams working this way. I wanted to paint a really clear picture of what good looks like. I wanted to give people a recipe to start from. It's not... I think every team has to learn how to adapt it to their own organizational context and what works for their team. But as far as the process of writing a book, I've been blogging for a little over 10 years now, actually coming up on 11 years now. So I'm a experienced writer and I think blogging actually really helped me hone my writing craft, and it helped me find my voice, and my point of view. So I had all of that before I started writing the book, but I still got caught up in my head about, is my voice different when I'm writing a book? A book is a big writing project, so really thinking about how to get the structure right was a little bit harder than I thought it would be.

But I did write the book fairly quickly. I started working on the table of contents in December of 2019 and I finished writing the book in December of 2020. So in about 12 months. And that was also during 2020, during COVID. Also, my dad passed away that year, so I had a number of big things that happened that completely pulled me away from the book, but I managed to still write it in a year. And that's because by the time I sat down to write the book, I had already tested all of the content. So if we think about continuous discovery as fast feedback cycles, writing a book is the worst because the way most people write a book is they write in isolation for a year or two, they send it off to an editor, they release it, and that's the first time they get feedback.

I didn't write my book that way. I tested all the content with my coaching teams. I then tested it with a larger pool of people through my online courses. I ran an early readers program where people read every chapter as I wrote it. And that really helped me get out of my head about, is this good enough? Is it working? And actually my early readers had a big impact on the format. They are the ones who suggested the anti-patterns at the end of every chapter. They really pushed me to include more examples. They told me when the research was too much and where they wanted more. So that was a really, really effective way to write a book.

Bosky

Book is a product at the end of the day. You don't use a waterfall model. It's about continuous discovery, [inaudible 00:18:19], and go on. I want to move into the whole topic around customer discovery. What are some of the anti patterns that you have seen over the years, maybe while working with the teams when it comes to product discovery, continuous discovery, how teams do? What are some of the things that we know are the right way to do it, but then our habits kind of get into the way and we basically go back to those old habits?

Teresa

Yeah, I think the big one, the first one I'll share is just a over reliance on AB testing. AB testing is a really important tool in our toolbox, but I would argue it's not a discovery tool. I think it's a measurement impact tool. We built a thing, did it have the impact we expected? The problem with using it as a discovery tool is you've literally done all of the work up front before you learned if you built the right built right thing, that's really expensive. I think the other problem is that AB testing is a measurement. It tells us, did this work or not? But it does not tell us why or why not, or what we could improve, or how to iterate on it. So we're missing a lot of the critical feedback that we get with different discovery methods. So I'm not going to tell a team don't AB test, but don't use that as your primary discovery method.

The second thing I see is I'm really thrilled to see so many teams starting to adopt my opportunity solution tree. I think it's a really great visual for keeping your team aligned and helping you chart the best path to your outcome. But I see a lot of teams think about it as, "Oh, I'm going to take all the solutions in my backlog. I'm going to uncover the implied opportunities, I'm going to put them on this giant map and then to make it work, I'm going to pick the broadest outcome I can possibly think of that covers this entire space." And you miss the point of the opportunity solution tree if you do it that way. The first thing is, is the outcome is supposed to set the scope of your discovery. So it's a strategic decision. We have quotes like strategy is not what you decide to do, it's what you decide not to do. So that outcome should be a filter, you're deciding right now the way you can create the most value in the business is to move this metric and that should filter out what you do and don't do.

And then same with customer needs, the goal is to get you away from starting with your solutions and to go talk to your customers and learn about their world and then to think about, what's the best way to solve those needs? So I don't love how often I see this bottoms up approach. Every time I see a blog post or someone's claiming my tool is great and then they're doing that, I just, I have to hold myself back from correcting them. But that is a big common mistake. And then I think the third one is that even if they are starting top down, they want to pull their opportunities just out of their head, they're not doing it starting with customer knowledge, they're really just capturing organizational truths that may not be true. And so that I also think is really risky. So what I would encourage everybody to do, if you're new to it, you don't have to adopt everything wholesale, but I think the number one thing you can adopt right away is get out and talk to your customers and use your customer interviews as your source material.

Bosky

Wonderful. Wonderful. That brings another question, Teresa, and that is, so these organizational assumptions, or organizational truths that you talk about, I think a lot of the times doesn't it feel like, again, I think culture might have a role to play here, but a lot of the times these top down initiatives, it's like things are already decided and they get handed down to the teams. So you can still do, I think, the opportunity tree mapping to figure out, what are the right opportunities to pursue, and things like that, but at a very local maxima kind of a way. Any tips or advice you would share for people who are working in companies or teams, which is very top down, everything is decided, you're essentially given what and you have to do within those constraints? A lot of the teams, unfortunately, work in those situations.

Teresa

Yeah. I think the first thing is to recognize that all humans, our brains are designed to be pattern matching machines. So why do our executives come in and prescribe solutions? Because they've worked in a context like ours before, that's why they're executives. And what they did in the past worked, and so they're assuming it will work in this new context. That's normal, and most of the time they're right. The problem with this pattern matching machine is like 80% of the time it's right. And where it gets us into trouble is that 20% or something isn't matching. And so I think what's really important is to start to explore what's similar in this situation to those past situations and what's different. And so product teams fall into this trap too, right? Like, "Oh, I've done identity management before. We should build it exactly the way I built it last time." Well no, the world might have changed. Technology has changed. Our customer base has changed.

So we need to look at what's similar. Why did we make those decisions in the past? What criteria do we base it on? How is that similar to what we're doing now? How is that different from what we're doing now? And this is also where, even if you think the answer and the situation is exactly the same, if you go out and talk to three customers about it, if you're right, you should get some pretty positive feedback. But more often than not, you're going to be surprised that you don't get it 100% right. So I think the first thing is to think about it from that timeframe. You can help your leaders surface some of that information, "So this is why you want to do this. I'm guessing it's because you had this experience in the past. Tell me a little bit more about that." Be curious about where that idea came from. And then of course, if we really are being prescribed solutions, there's a whole bunch of solution discovery we can focus on. We can story map the idea, we could test the assumptions, and still do all that solution discovery even if we're being prescribed solutions.

Bosky

Thank you. Yeah. No, it's wonderful. So that brings another question that I was kind of thinking. How do you deal with the unlearning? So this is kind of really interesting, right? Because a lot of the times I kind of wonder, I think the more experienced we are, it's harder to unlearn those habits, of course. And so when we are trying to adopt some of these new paradigm shifts in our teams and organizations, how do we actually open up to unlearning? Are there tools? Is this something else that needs to happen just on an individual desire to grow?

Teresa

I think we have to have motivation to unlearn. So first of all, Barry O'Reilly wrote a book called Unlearn, which is excellent. So I'm going to throw on a plug for that. And then also I think people aren't going to change just to change, right? There has to be something that motivates you, something that's no longer working for you that plants the seed for, "Maybe I need a different way of doing this." So if we use fitness as an example, if you're really good at going to the gym, and you go to the gym three to five days a week and you're really disciplined about weightlifting, and it's working for you, you're not going to change. But if you hit a plateau and you stop getting strength gains, that's usually enough to motivate you to say, "Okay, there's something wrong with my routine. I need to unlearn what's worked for me in the past and find something new."

I think the challenge is... The number one question I get from individual contributors is, "How do I convince my leaders to work this way?" You're not going to, they need their own motivation to change. Now what you can do is help expose a reason to change. So most executives, most people, frankly, on digital teams are not aware of the fact that most of what they're building is having very little impact. We can expose that. We can instrument our products, we can start having conversations before a release about the expected impact. We can document that. We can follow up, we can show the gap, we can start sharing customer stories that are not aligned with an internal company narrative. So rather than having the ideological war about the right way of working, I'm going to put right in quotes because there is no one right way of working, it's better to expose the pain that might currently be hidden so that other people can come to their own conclusions.

Bosky

So it's almost like bubbling the facts and so then it becomes less personal and less kind of opinion and you basically expose it and it's up to people to kind of see it out there and then hopefully they're able to realize.

Teresa

Yeah, I think it's like a good analogy is thinking about walking through a dark cave where everybody has their own flashlight. And we're all making judgments based on the part of the cave that we can see. It's like that parable of the elephant, right? Whereas I think what I'm suggesting is, don't argue that what you see with the flashlight is better than what somebody else sees with their flashlight. Help them see your flashlight and also do the work to see their flashlight. So it's more about, how do we light the whole case and get out of our really narrow points of view?

Bosky
And that is the different perspectives.

Teresa

Yeah.

Bosky

Really. So you talked about outcome and you also write in your book about output versus outcome. But this is a really, really hard mental shift. I mean, I think almost on a daily basis or weekly basis there is some post on social media, LinkedIn, about output, outcome. And yet this is one of the things I think a lot of the teams they really struggle with. It's very easy to get into this output tasks, deliverables, and really forget about looking at it at a higher level. Can you maybe... Why do you think this is so hard? And what are some of the things that maybe teams and individuals can do so that they can think about outcome versus output?

Teresa

I think first of all, we tend to talk about output and outcomes as a dichotomy, like they're two distinct things. Whereas I think it's more of a spectrum. So if we just use an example of a product team, I worked with a product team that was... They were a learning site, so they helped students find the best college courses for them. They started coaching and their outcome coming in was launch reviews, student reviews. Okay, that's clearly a output. I think everybody would agree that's a output, that's a thing, it's a feature, it's something they're adding to the product. How do we get closer to a outcome? Well, when they read the outcome material, they said, "Okay, well we're going to increase the number of reviews on the site." That's a little better, but I would argue that's still an output because a single review is an output and now we're just counting how many outputs we have.

So then how do we get even closer to an outcome? So the reason why number of reviews is better is it's something we can count. It's a metric, we can make it go up. It's a vanity metric, it's always going to go up, and it's really counting output, so I don't love it. So how do I make it better? Well, what's the value of those reviews? Well, they're valuable when people see them. So maybe we need some metric around increase the number of courses that have reviews. Okay, that's a little better, but not all courses get seen. So we might spend a lot of time and energy creating reviews for courses that nobody cares about or nobody sees. Okay, well, the other challenge with that is, what if one course has one review and another course has 10,000 reviews? That's not equal value. So now we can get a little better by saying, "Okay, what's really valuable is we want, whenever somebody views a course, we want them to see multiple reviews." And maybe we say three is the magic number.

Now we can set up even better outcomes, let's increase the number of course views, the percentage of course views that have at least three reviews. Okay, that's a great outcome. Now we're actually measuring value, this benefit of getting to a better outcome, because we've actually made our problems smaller. It might be really hard to get three reviews on every single course in our catalog, but the set of courses that actually get viewed, that students are actually interested in, is much smaller than the total set. And we can focus on that much smaller set, making a smaller problem, and still get most of the value. And so I think as we shift from an output to outcome mindset, really what we're asking is, what's the value of that output? And usually we make the mistake of counting outputs and then we say, "Okay, is there value in more outputs?" We got to look at the distribution of those outputs. We got to look at how those outputs create value for the customer. And I think continuing to ask that question gets us closer and closer to a better outcome.

Bosky

I love how you kind of derive that. I mean, it's so subtle, especially I think for people starting out. It's very, very subtle. I think once you do it long enough, I think the difference between the two kind of start broadening, but Teresa, for someone who might be maybe very new to this, are there things that would trigger to them or tell them that, "Hey, you have an output, not an outcome." or is it more where they have to go and maybe get it reviewed from someone else?

Teresa

I think the first question to ask is, "What are you counting?" So I see a lot of outcomes in quotes that are really outputs. They're not counting anything. We're going to launch reviews. "Okay, what are you accounting?" That's the first question. "Okay, well how about number of reviews? I'm counting reviews." Okay, can you think about how you might game that metric? Right? So I can game that metric by paying

10,000 people to write really low quality reviews. Is that good? Are we going to feel good about that? No. So thinking about if we were evil actors and we were trying to game this metric, what would we do?

And even where I landed before, like increase the number of course views with at least three reviews. They could be three low quality reviews and I can still game it. So I might even refine that to say, "Increase the number of course views with three high quality reviews." So it's really looking at... another question to ask is, "What's the value of that?" And we really want to be clear about the value. So the value of high quality reviews is it helps us make a better decision about what course to take. The value of more reviews is not necessarily, it helps us make a better decision. Depends on the quality of the reviews, it depends on how the reviews are distributed. So I think really trying to count value is the key to a good outcome.

Bosky

Love it again. Really, really good. Really, really. I mean, this is just so so good, Teresa. You also talk a lot about research questions and interview questions, right? You've talked about that a lot. And I just absolutely loved, I think the first time I read about it I was like there was a light bulb moment that went in my head. Is there an example that you can kind of walk through? Because a lot of the times people do get confused between the two. And also maybe talk a little bit about what kind of questions should be used under what circumstances.

Teresa

Yeah, so this idea of research questions came from me just observing so many teams preparing for an interview by generating really long discussion guides, lists, and lists, and lists of questions they want to ask the customer. This happens, I think, because people don't interview very often and so when they think about an interview as the opportunity to learn everything and anything they could possibly want to know. And then the downside of that is we end up peppering the participant with a million questions. It starts to feel like an interrogation, because we're asking so many questions, we get really shallow responses. It's just not a very good experience for anybody. And because of the way our brains work, we're actually not getting very reliable answers to our questions.

So I'll give an example. If I look at Netflix and I'm trying to understand why, how, and when you watch Netflix, I might ask things like, "What do you like to watch? How do you decide what to watch? Who do you watch with? What device do you watch on? Where are you when you're watching Netflix? How many hours a day do you watch Netflix? How often each week do you watch Netflix? What other streaming services do you watch?" Right? I can come up with a million questions. But if I ask you those individual questions, I'm just going to collect what I call facts. And they're not even reliable facts. I'm just going to collect little data points that may or may not be true. So you're going to have answers for me, maybe you like reality TV or action movies, and you watch in your living room with your significant other a couple times a week. You're going to be able to come up with fast answers to those questions.

The problem is, first I have zero context. I don't know why you like reality TV. I don't know if you like all reality TV or only certain kinds of reality TV. I don't know if you watch it religiously. I don't know. I don't have any context whatsoever. And also as humans, we're not very good at summarizing our own behavior. So a lot of the things that you tell me may not actually be real in practice. And it's not because you're trying to be deceptive, it's just because maybe you told me reality TV because that's the last thing you watched, but you also watch action films, and you also watch Jeopardy, right? There's all this other stuff that's going on. So I like to think about those who, what, why, how, when questions as our research questions. This is what we're trying to learn from our customer, but it's not what I want to ask in an interview, because one, I'm going to get really shallow answers, and two, those answers aren't necessarily going to reflect real behavior. So instead I want to ask what I call an interview question.

And in my world an interview question is a story based question, so it's a question designed to elicit a specific story. And this is really grounded in a lot of research on how we help people recall reliable memories. There's a lot of research in the criminal justice world around this. You can imagine witnesses in a trial, we're trying to really uncover what actually happened. And so this is where I might ask, "Tell me about the last time you watched Netflix." And then as I collect that story, my job is to keep you grounded in that specific instance. But I can listen for, where were you? Who were you with? What device were you on? How did you decide what to watch? And the value of collecting the answers to those research questions in the context of a story is as long as that story was fairly recent and you can remember it, your answers are going to reflect your actual behavior because you're telling me what you did, not what you think you do. And then the other benefit of stories is we get context, we get environment, we get pain points, we get needs, which is really what makes our interviews actionable.

Bosky

So would you say then maybe a way of, an analogy to the research questions, are they more like qualifying questions? [inaudible 00:38:13]-

Teresa

I define research questions as what you're trying to learn from your participant. And it's okay to ask a research question in the context of a specific story. So I can say, "Tell me about the last time you watched Netflix." And if you're struggling to get started I can say, "Set the scene for me, where were you?" And one of my research questions might be, "Where do you watch Netflix?" The difference is, if I ask you, "Where do you watch Netflix?" Your answer is going to be colored by a number of biases. A big one is recency, but we're going to have that same bias if I say the last time you watch Netflix. But we can overcome that. But other ones are things like, maybe you don't want to tell me you watch Netflix on your iPad in bed because you feel like that's a bad behavior, and so instead you're going to tell me about watching Netflix on your TV in the living room, right? We add all these judgments so we select what we're going to share based on those judgments. Now that happens sometimes with collecting specific stories, like you might not want to tell me about the last time you watch Netflix, but that's okay in the context of as long as it's a real story, I'm still going to get that broader context and just a depth that I'm not going to get by asking direct questions.

Bosky

Got it, got it. And so then that brings another question. Let's say zero to one, you don't have any prior research done and you are trying to understand your users. How would you then recommend teams go about it? How do they even know what stories to seek at that point in time? Because they're starting zero, right?

Teresa

Yeah, it really depends on your outcome. So the first thing to do is to identify what's the most important outcome for you to work on. For most of us that's going to be derived from our products business model. It's going to help us understand what are the business outcomes our leaders care about. And then we need to look at what are the product outcomes that can influence those business outcomes. So I'll stick with Netflix as my examples. Netflix business outcomes are going to be things like increase our number of customers, increase how much they spend every month, increase how long they keep their subscription. So then I can look at what are behaviors in the product outcomes that can drive those metrics. So for increasing subscribers, I might look at things like increasing SEO traffic. That's something that product teams often focus on. Or it could be increasing the conversion rate from a free trial to a paid subscription.

For increasing average monthly spend I might look at increasing upsells within the product, increasing engagement with those premium features that drive upsell. For retention I might be looking at something like increasing engagement, increasing how often you watch or how long you watch. So I'm going to start with an outcome and then the outcome's going to influence what I might explore in my interview. So if I'm focused on customer acquisition, I'm going to want to interview people who signed up recently and I'm going to want to ask them something like, "Tell me about your decision to subscribe." But if I'm focused on retention or engagement, then I'm probably looking at something like, "Just tell me about the last time you watched Netflix." If I'm focusing on upsells, I probably want to talk to somebody who's upgraded recently and learn about why they did that. So your outcome will set the scope, which will set the scope of your story based question.

Bosky

Thank you. No, that is absolutely, I mean, I started kind of thinking about some of the times I made the mistake as well. So thank you, Teresa, I mean, this is just wonderful. We'll kind of shift gears a little bit on some of the bigger, larger monolithic organizations. How does continuous discovery look like in smaller companies and larger companies and what are some of the challenges specific to some of those larger companies?

Teresa

I would argue in theory, they're exactly the same, whether you have a product or not. All that's really required... I see a lot of people say that my process works for big companies and not for startups, which is really funny to me. All my full-time experience was at startups. It definitely works in startups. I think the only real difference, if you don't have a product yet, is that you have to have a theory of who you want to serve and you have to have a theory of a value proposition. So the example I often give is, maybe I want to start a company, I don't know what the solution's going to be yet, but I want to help podcasters and I want to help them grow their audience. That's enough. I can set my outcome as increase the average audience size of my podcasters. I can go interview podcasters about how they're marketing their podcasts, how they're growing their audience, "Tell me about the last thing you did to grow your audience. What worked, what didn't?" And away I go and I'm set to move forward.

What's great about a startup is you tend to have less cooks in the kitchen. So there's less like inertia or it's easier to get momentum. In a large company, I see a lot fewer empowered teams. So maybe your outcome is a lot narrower scope, your discovery space is a lot narrower, but I would argue the process is exactly the same. I could start with an outcome like, increase the application submission rate of this very narrow workflow in our product. And I'm still going to start with a broad story based question, "Tell me about the last time you applied for this thing." I'm still going to listen for opportunities. I'm still going to do opportunity mapping and story mapping of my solutions and assumption testing. My scope is just a lot narrower because I'm working on a much smaller part of the product.

Bosky

Now I can see that. I can definitely see that. But it's crazy I think there is this just, I think this belief, right? That it works at this situation and it doesn't work. And it's just, I think, about reframing those little things to make it work. Sounds easy, it's really, really challenging though a lot of the times. Teresa tell me a little bit about if someone wanted to get started, let's say they either kind of do these big bang research, maybe once a quarter, or maybe once a year, whatever that is. So instead of continuous, they're doing these big bang, or maybe they don't do it at all. How would someone, or how should someone get started? What are some of these one, two quick wins to get that buy-in internally or even motivate your teams if you are a leader who's trying to do it? What are some of the things that you can do both as maybe an IC and maybe a couple things that a leader can do to get their teams excited?

Teresa

I think as an individual contributor, the first thing for most people, I would start with building your interviewing habit. So just talking to a customer once a week. If once a week sounds overwhelming, you can try to do monthly and then eventually work your way to once a week. I find that most teams are not talking to customers at all or they're only talking to customers in a sales conversation. Having a customer conversation where you're just collecting their story is a game changer. You'll be blown away by how much value you get from even a small number of conversations. For the vast majority of teams, I think that's the biggest return on investment, so I would start there. If you work in an organization that's super quant minded, like maybe you run 800 AB tests a month and nobody believes anything without any quantitative data and you're building everything before you run an AB test. In those cases, I would say start with assumption testing.

So learn how to run teeny tiny tests where you can get data back in a day or two, because it will break the cycle of having to do all the work up front before you get any feedback. And if you're a really quant focused shop, people may not trust interviewing. I think that's crazy, but those shops exist. So if that's where you work, then I would definitely recommend starting with assumption testing. But for the vast majority of people, interviewing is where you're going to get your highest return. I think for leaders, I think where the leaders can have the biggest impact is on team structure and on setting good outcomes. So making sure that every team is set up so they actually are empowered. So they have some autonomy, they have the ability to deliver value end to end. A lot of our teams are not structured that way. So really looking at how you structure your teams so they own a part of the product and they can release things on their own and you can move at whatever cadence works for them. And then really helping with defining an outcome framework that's derived from the business model so that what they're working on creates value for the business.

Bosky

I'm supposing that with all of this, it's also about making sure, I think, that your teams are scaling up, because it is an essential skill. I don't think a lot of us are born with it, so we even forget. So I think there as leaders you can definitely do, I think, a lot more work to ensure your teams are learning and growing.

Teresa

Yeah, I think I see a lot of leaders think they can just announce, "We're going to do this." and then they don't offer training. If your teams historically have been given a fixed roadmap and they're good at delivering solutions, you can't suddenly just say, "Go drive this outcome." They will have no idea what to do. And that's where training can be really effective. I also think leaders tend to frame this organizational change as only at the team level, and that's not true either. It also has to happen at the executive level, it has to happen at the product leadership level. Leaders have to learn how to give feedback without dictating solutions. They have to learn that when they express an opinion, their team is going to take it as truth. There's a lot that has to happen throughout the organization to support this way of working.

Bosky

There are these little quick wins. I think it's also about the momentum. I think once you start seeing the value coming out of these small little things, I think it becomes a lot easier to kind of make those big changes. Teresa, you talked about assumption testing and I hear often from people testing outside of interview means running these two week, three week, four week AB tests, and of course then trying to get the statistical significance. A lot of times you may not get statistical significance if you don't have that kind of data, you don't have maybe that many users, and things like that. So am I correct in assuming here that these assumption testing could also be quick interviews or quick mocking up of maybe some concept that you're thinking and getting that feedback and starting to see patterns? It does not have to be a mathematical proof.

Teresa

Yeah. I like to design assumption tests so that I can collect data in a day or two. That's what's going to allow me to test multiple assumptions across a set of ideas, which really unlocks better decision making. So that's a hard constraint I put on a assumption test. When you're new to assumption testing, you don't have the right tools in place, there's a learning curve. So if it takes a little longer than that, it's not the end of the world. But that's the benchmark I want to see teams aspire too. So what falls into the category of an assumption test? Well, the obvious one is a prototype test. We can prototype something, we can get feedback from customers. I think we're not very rigorous, for the most part, in our assumption testing or our prototype testing, we can do a better job. I also think we prototype too much. So we prototype the whole solution, whereas I want to see you prototype just enough to test a single assumption.

We have access to amazing tools with unmoderated testing. We probably can design, execute, and evaluate a prototype test in a single day, which is pretty amazing. I can tell you 25 years ago we were not doing that. I think with one question, survey tools, we can get a lot of data quickly on things. I'll give you an example. I run an online community for people adopting the discovery habits. Based on the conversation that was happening, I was assuming my members were interviewing weekly, I started running a weekly poll. It was as simple as, "Did you conduct an interview last week?" And I'm blown away. We have a ton of work to do, right? So I was working on, we got to work on these advanced habits. And I'm realizing, nope, we got to start at the very beginning. How do we lay the framework for really strong habits? Data mining can be an assumption test. If you have a very... Do people do this thing? Are they using this part of the product? Will they continue to use this part of the product? So there's lots of ways to test assumptions. I think the key is that we want to design them so that we can get reliable data in a day or two.

Bosky

And to do it in a way that people are not spending all of their time and effort on these high fidelity designs, right? It needs to be really quick that we wouldn't even feel bad throwing them away if those assumptions don't get validated. Because I think when it comes to testing, Teresa, I think there is so much pressure in getting a yes from the test. And I think a lot of the times it's equally important for those tests to be invalidated as well. And I think we don't often think about that piece. Right?

Teresa

Yeah, there's a really great Karl Popper quote, and I'm not going to remember off the top of my head, but it's something along the lines of, "We learn from our failed tests."

Bosky

I love that.

Teresa

That's actually where the learning happens. It means we expected something to be true, that turned out not to be true. And I think there is a place for high fidelity prototyping, but it's much later in the process. It's when you already have confidence in your solution, you've already worked through all the risky assumptions, and you're putting the polish on. So just like there's a place for AB testing, it's when you already know you're building the right thing and you're just measuring impact. Great. Same with high fidelity prototyping. We do need to do it. Usability absolutely matters. Visual design absolutely matters. But in the first several cycles, we really are trying to remove risk from the idea, and that's where focusing on specific assumptions, doing quick and dirty prototyping, fast feedback cycles are really valuable.

Bosky

So why do you think, Teresa, it's so hard for people to share those, I call them chicken scratch designs? Why is it so hard for us to share that? Is it the fear of being judged or is it chasing some idea of perfection, or is it something else?

Teresa

I think it's a few things. I think one is it's design culture, right? UX mostly grew up under an agency model where agencies sold big projects, right? They're not going to sell a one or two day test because it's not worth the contract and-

Bosky

hours, right?

Teresa

And the procurement process, right? So I think that UX grew up in an environment where we sold big projects and it's really influenced the way we think about research. Thankfully, I think we're starting to break some of those norms. I think some of it is a fear of failure. People want to put their best foot forward to increase the likelihood their test will pass, whereas I think that's exactly backwards. We want to be doing as little as possible hoping our test fails, because that's really where we learn.

Some of this is just, frankly, especially here in the U.S., the last time we thought about scientific thinking was the fifth grade science fair, which most of us didn't even participate in. So it's just exercising that muscle for the first time and really learning how to get those reps in. So it's a lot. The internet has unlocked a lot of access to amazing things, but it also requires that we just learn new skills. And so what's nice is that we get access to all this stuff, but we got to put the time and effort into learning the skills and getting those practice reps in.

Bosky

This has been so amazing, Teresa. One last question, I think, as we start to conclude this, what's next for you?

Teresa

That's a really good question. I am currently really reducing what I'm doing because I just had a very hectic two and a half years. I wrote a book. I spent a year promoting it every day. I designed two new courses this spring. So I'm currently coasting, which feels fantastic, but I'm already starting to itch for what's next. I have five different deep dive courses on five of the different habits in the book. And I think each of those courses could be a book in its own right, so it's possible I will be writing more books. I'm not ready to commit to that yet.

I really want to write more in the diversity, equity, justice, and inclusion category. I think there's a lot we could be doing in the discovery world to be more inclusive, so hopefully I'll be writing more in that space in the near future. And then I'm also just... I don't know. We have six different courses and I feel like I could spend the rest of my life just iterating on those and making them better. We have an online community that's a ton of work, and super fun, and trying to grow that and turn that into a... that's like somewhere in the 0.5 stage of a zero to one product. So that's been a lot of fun. But yeah, I haven't yet identified that next big thing, but I have a lot of ideas for what it might be.

Bosky

And that's a very fun period, when there are all these different ideas and then you have to kind of figure out what's next. Well, I wish you well.

Teresa

Yeah. And I'm also just kind of recovering. I feel like the world went through a couple hard years and I pushed hard during those couple hard years. So I don't think we talk about taking breaks, or sabbaticals, or even just people talk about quiet quitting. I think that it's perfectly fine sometimes to just coast a little bit at work. I don't mean don't do good work, but you don't have to always be chomping for that next big, giant project because sometimes we need a little recovery. So that's where I am. I'm in a recovery mode for right now.

Bosky

I love it. I love it. Teresa, if there's any time, any time I can ever collaborate with you or help you, I love the diversity, equity, especially when it comes to discovery. So count me in, that's a personal area that I am very, very passionate about and means a lot. But this has been an absolute privilege to be talking to you and hearing all of your perspective and thank you so much.

Teresa

Thanks, Bosky. Is it okay if I share some resources for folks who want to learn more?

Bosky

Absolutely

Teresa (00:57:01):

Yeah. So I blog at producttalk.org. That's also where you can learn about the book. And then we have, in addition to the book, especially for people who have read it, if you want support putting it into practice, we do have an online community at members.producttalk.org. And we have a variety of online courses at learn.producttalk.org.

Bosky (00:57:01):

Awesome. I love all of them. Thank you.