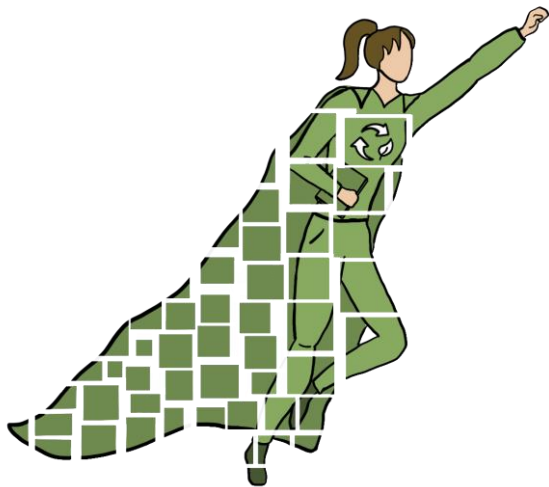# *Rapid Inquiry of Stakeholder Values*

Sustainable Innovation Practices Educational Toolkit

Impact

Rapid Inquiry of Stakeholder Values

Sustainable Innovation Practices Educational Toolkit

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resources from UXBerlin, the module Business Anthropology
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Methods for Rapid Inquiry of Stakeholder Values

Methods for Rapid Inquiry of Stakeholder Values

Many companies, start-ups and public organizations seeks to adjust their values and make substantial efforts in order to contribute to sustainable development, but only few succeed to establish a sustainable innovation culture. One essential barrier in bridging the values-action gap are insufficient skills and competencies in understanding and managing different stakeholder values and sometimes latent tensions and conflicts. Hermeneutic methods and ethnographic inquiry are well suited to elicit even implicit stakeholder values and to analyse values-based and sustainability-oriented practices and conflicts. However, they require substantial time, effort and advanced competencies, which constrains their wider adoption in organizational and educational settings.

How might we streamline and teach ethnographic approaches for rapid inquiry of stakeholder values and sustainability-oriented practices?

Methods for Rapid Inquiry of Stakeholder Values

Overview of methods and techniques

The ethnographic research approach is developed as an interpretative approach to understand people and meaning of cultural practices. It addresses questions like: "Why do people do what they do?" and "What are the full implications of doing so?" Its combination of field interviews and observation is adopted to study organizational innovation cultures, sustainability practices and values of different stakeholders.

Several **techniques** can help you to further streamline the basic approach and elicit stakeholder values in context of practice. These include: generative questions, laddering, mapping tools, competing values review, 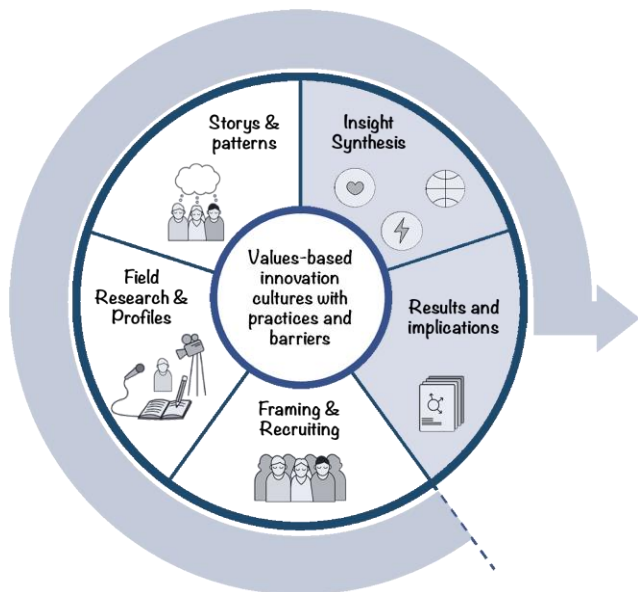role play, card sorting, evocative objects, heaven & hell exercises, as well as the qualitative research **practices** of profiling, storytelling, pattern recognition and insight synthesis.
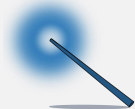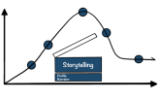
Methods for Rapid Inquiry of Stakeholder Values

Methods for Rapid Inquiry of Stakeholder Values

Sequence of activities with key methods and techniques*

Frame an appropriate research question that addresses the holistic nature of values and associated management challenges. Select and recruit stakeholders relevant to the research question as **respondents**. Prepare a semi-structured interview and observation **guide** and enhance it through various interview techniques, interactive exercises and staged activities. Audio and video **recordings** and your field notes will help you to create individual or group **profiles**. Involve different researchers in collaborative **storytelling** and pattern recognition to understand and categorize the data and to identify recurring **patterns**. Interpret desires, values and tensions experienced by the respondents and formulate your 3-6 key **insights**. In a final step, translate insights into more actionable **results** and draw from related theories and insights to address the challenges you found.

Generative Questions

Generative Questions

- Clarify the goals and approach of your research and get the respondents' consent. Then, start your interview with very open questions, allowing respondents to articulate their unique point of view.

- Follow-up with questions to reflect upon values like: What is important to you in your vocational life? What else do you care about with respect to your work? How would others characterize you, and what matters to you?

- Proceed from general to specific questions like: What are typical sustainable innovation practices in your organization? Why do you think that is? Can you give me an example?

- Ask clear but lengthy questions (e.g. on the professional biography) as "narrative stimuli". They prompt respondents to share personal stories and reveal their own system of values.

- Exploring values attend to violations of these values – that is often when they become evident.
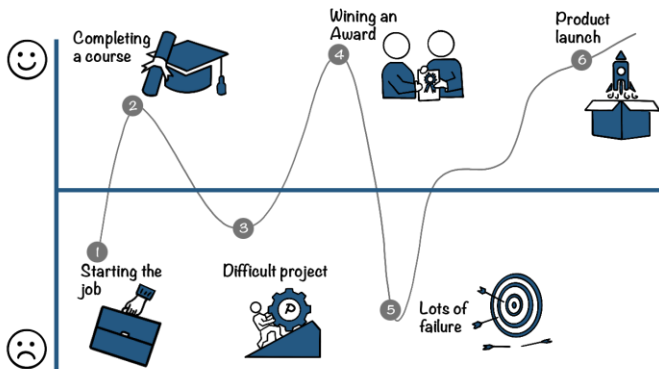
Laddering

Laddering

- Laddering is a popular technique used to elicit values and decision-making structures in organizations.

- Start by asking about a specific work situation, e.g. "Please tell me about a sustainable innovation project you were involved in. What are, from your point of view, the main criteria that determined the project's success or failure?".

- After hearing the response, follow up and refer to key aspects of the narration to ask why the interviewee considers them important or relevant. Keep probing with "why" questions about the responses of your interviewee to elicit (a hierarchy of) implicit motives underlying values.

- Do not ask again for facts the respondent already mentioned. Instead, follow up on responses exploring the reasoning or potential tensions or problems behind the stated facts and viewpoints.

Mapping Tools

Completing a course

Wining an Award

Product launch

Starting the job

Difficult project

Lots of failure

Mapping Tools

- Mapping tools like onion diagrams or mood curves help to prioritize areas of concern or elicit emotional highlights and lowlights and critical turning points at the job, respectively.

- For instance, mood curves provide indicators what mattered to the respondent in the past, e.g. with respect to sustainability. Depicting such emotional mood-curves can help tap the affect-laden nature of values and barriers to turn them into reality.

- Ask respondents for critical moments – highlights and lowlights – in the course of their work experience: From the settling-in period, periods of employment in different roles, up to their future expectations. Map these critical moments on a template and link them with a line.

- Then, ask respondent to explain the extremes of satisfaction and frustration and the turning points of the curve. If the respondent struggles to draw, help with an example from your own work experience.

Role Play
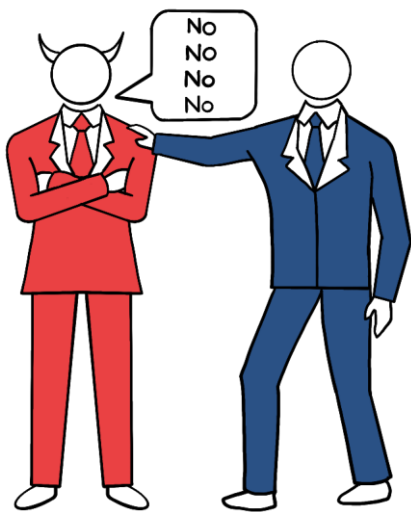
Role Play

- Role play engages respondents in enacting the behaviors and/or values of stakeholders in a playful manner.

- Provide respondents with cards or other cues that indicate typical characteristics of their roles, such as common behaviors, values, needs or other characteristics. It will facilitate their understanding and performance.

- The assumed roles can represent members of relevant stakeholder groups or roles within a team, stereotypes like a good and bad cop, or conceptual roles (like the dreamer, realist and spoiler in the Disney brainstorming method).

- Some role play could assign an advocate 'diabolus' role to the respondent and ask for a critical or even cynical response to the officially proclaimed values (e.g. "Which of our values can support greenwashing?").

Card Sorting
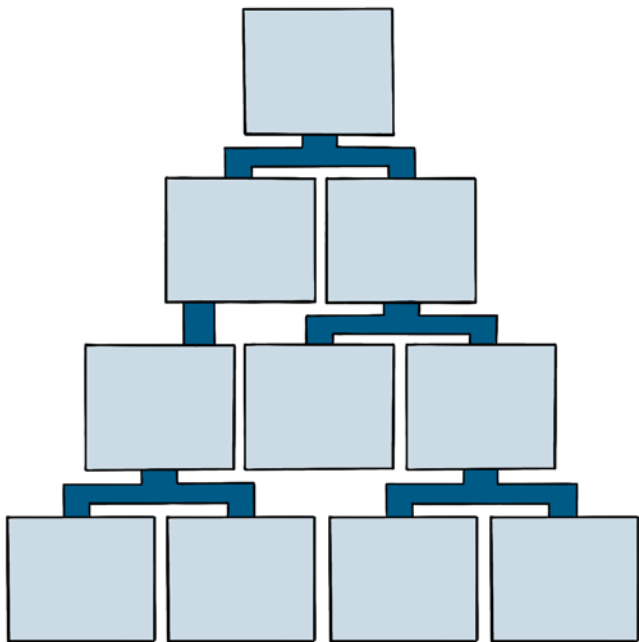
Card Sorting

- Card sorting builds on spatial perceptions of proximity, distance and direction to convey relations between different items (e.g. values). The tangible nature of cards allows participants to post them into different contexts, to interact with them and move them around. Thus, cards allow embodied cognitive processes and communication and help to make abstract statements more tangible.

- During the interview, draft cards based on values mentioned in the conversation. Then, ask the respondent to further explain each (e.g. in relation to sustainability) and to prioritize them by drawing connections and creating a hierarchical order.

- You can also add cards prepared before the interview with content from public sources (e.g. values or related statements from annual reports or websites of the company) and ask about their meaning and personal relevance for the respondent.

Heaven & Hell
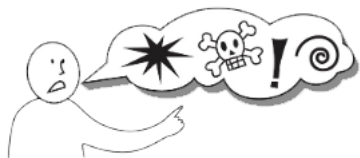
Heaven & Hell

- The exercise asks respondents to imagine extreme, exaggerated developments to elicit deep concerns, fear and far-reaching hopes. It allows to think through the consequences of potential developments, such as rebound effects of sustainability projects.

- Consider starting with a 'hell' scenario, asking respondents to share their thoughts about how the current situation (e.g. previously identified value-action gaps) could worsen and what could be the worst thing to happen?

- Then, ask respondents to imagine all barriers or constraints - in terms of power, time, budget, even gravity itself - are overcome. What might a radical or ideal development in line with their values look like?

Evocative Objects
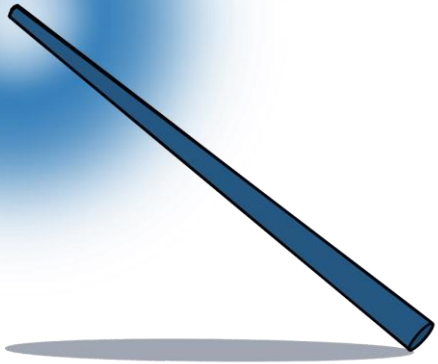
Evocative Objects

- Evocative objects can be used to close the field interview session on a positive note, energizing the respondents and eliciting their future-oriented desires and underlying values.

- For instance, you can pass a magic glove or wand to the respondent saying: "It gives you magic power to change anything you like for the better. Think about it, and then please say your wish to change things in innovation or through innovation in the near future. If there is any object here nearby related to that wish, please hold the magic wand against it." (Then, take a picture of the respondent holding the wand.)

- Follow-up conversation should again clarify the relation between the object and the respondent's future-oriented desires or key research themes, e.g. sustainable innovation.

Competing Values Review

"Star" Employees

"Not-so-hot" Employees

Leadership team

Competing Values Review

- Use this technique to elicit implicit values in a organization that shape the development of a sustainable innovation culture.

- Provide your respondent with a mapping sheet depicting three groups of employees. Ask them to describe typical values and behaviors for each group and add notes to the worksheet. Respondents can refer to their experiences without mentioning any names.

- First, ask for 'star employees' and their values or behaviors that fit well to the culture and represent the best of the organisation. Ask for 'not-so-hot employees' that do not fit well. Their qualities provide a contrast and greater context for understanding the culture and delineating conceptual distinctions between values. Asking for 'leadership team' typically reaffirms the 'star employees' values or behaviors and adds further characteristics shaping the culture.

* Santoriello, A. (2015). Assessing unique core values with the competing values framework: the CCVI technique for guiding organizational culture change. Portland State University.ca
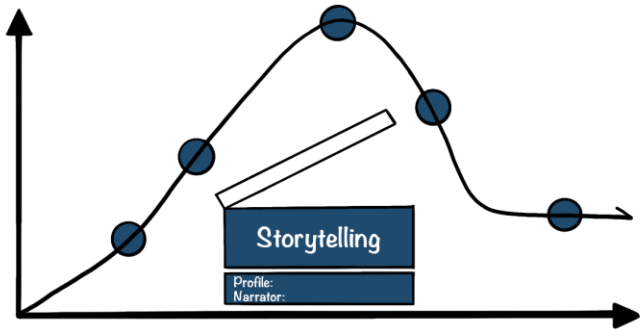
Profiling
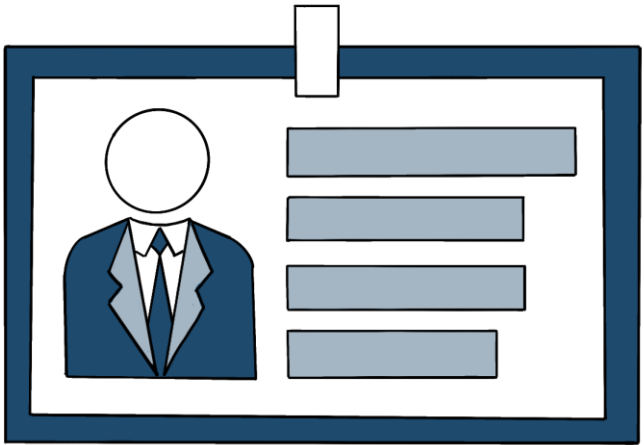
Profiling

- Documentation of profiles applies structured templates following the key topics of the interview guide to document the recorded data (e.g. quotes, pictures, field notes) and facilitate orientation and comparisons with it.

- Include details, examples, stories and quotes in each subtopic of the profile. Provide context for the respondent's statements. Use pseudonyms and anonymize sensitive data.

- Attend to the ways respondents categorize concepts, the use of metaphors, and potential contradictions between statements and observations.

- Describe respondent's reasoning about or meaning and relevance of topics; look for conflicts, tensions and issues respondents are struggling with.

- Highlight expressions of feelings (e.g. of remorse) and emotions.

- Include pictures from the field and everything (that is not off topic) from the audio recording.

Storytelling

Storytelling

- Facilitation and timeboxing for storytelling involving field researchers and stakeholder representatives helps to break up and deeply understand the field data and profiles. It enables researcher triangulation and communicative validation of interpretations.

- Set up printouts of the profiles on the wall or in an online collaboration platform. Each researcher shares (15 min) the story of his or her respondent with reference to the profile.

- Participants note on post-its and explain what they find remarkable in each profile. What is interesting, new or surprising? What are needs and behaviors, challenges and pain points, motivations, needs and values …?

- Encourage questions about the respondent and collect all written post-its around the profile. Allow similar formulations, as these can add new perspectives. However, restrict contributions to what can be found in the field data and profiles (no hearsay or opinions).

Pattern Recognition
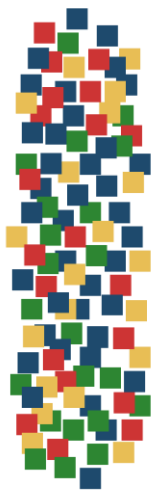
Pattern Recognition

- Pattern recognition reinforces recognition of recurring patterns and bigger themes that connect the data.

- Engage in creative and analytical conversation to interpret single findings and cluster them into overarching topics.

- Address questions like: What is interesting, new or surprising? What is reocurring? What are the main differences, and what are the commonalities between the findings?

- Organize all post-its into clusters (patterns) and name each cluster.

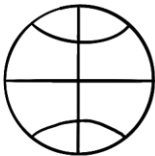- Analyse clusters to identify and prioritize initial seeds for overarching insights.

Insights Synthesis

DESIRES

I want ...

VALUES

... so that ...

CONFLICTS

... but ...

Insights Synthesis

- The documentation of observations and statements summarizes what respondents do and say. Insights explain why they act accordingly (explanatory power): What lies underneath each pattern? What is of overarching importance for the respondents? What answers our project questions? They articulate tensions between desires, values and opportunities of fulfilment.

- To generate insights, browse through the post-its and patterns. Look for the fundamental aspects and tensions. Try different formulations using the sentence structure: "I/We want/need…" (desire), "…so that…" (value) "…but…" (conflict or tension).

- Focus on 3-6 key insights. Illustrate each with descriptive quotes and stories from the data. Elaborate on them with further interpretations, visualisations and references.

- Lastly, turn insights into calls for action, e.g. innovation territories and design spaces with guidelines how to approach them.

Example: From Raw Data to Insights in an Inspection Company

Calls for Action

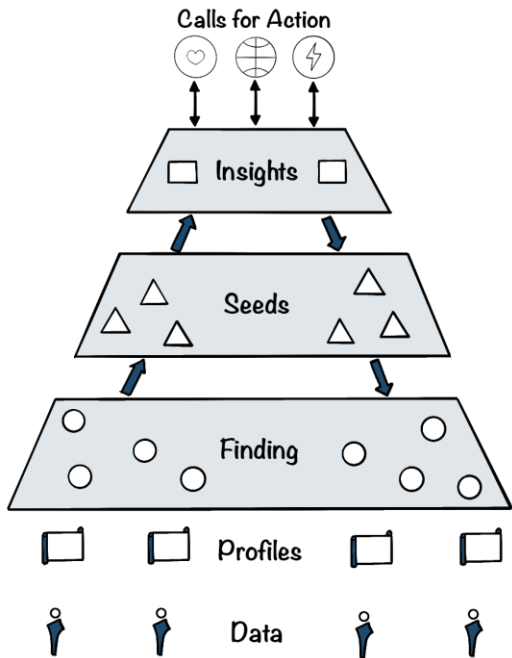Insights

Seeds

Finding

Profiles
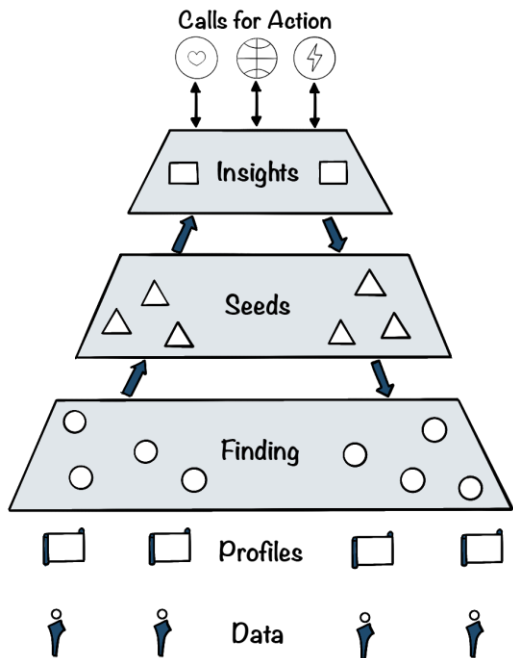
Data

*Example: From Raw Data to Insights in an Inspection Company**

- **Research question:** "What are organizational barriers and challenges to values-based and sustainable innovation?"

- **Post-it based on a respondent quote/story:** Christos values dialogue with other business units as it helps to identify better suppliers.

- **Post-its summarizing findings from multiple respondents:** 1) Substantial budget lost because of contracting an unqualified supplier but better supplier found thanks to collogues from another unit. 2) Conflicts among business units about project responsibilities and gains.

- **Patterns:** 1) Sustainable innovation depends on the exchange knowledge among business units. 2) Conflicts between units about how to share responsibilities and gains halts the initiation of joint projects.

- **Insight:** I want to have more dialogue with colleagues from other units so that we can gain a diversity of perspectives on how to tackle sustainability challenges, but we have divergent interests and hesitate to cooperate.

*Ethnographic study on drivers, practices, and challenges in establishing values-based innovation cultures for sustainable business impact, conducted by H. Breuer & K. Ivanov in 2022 for the IMPACT project

Example: From Raw Data to Insights in an Energy Company*

*Example: From Raw Data to Insights in an Energy Company**

- **Research question:** "What are organizational barriers and challenges to values-based and sustainable innovation?"

- **Post-it based on a respondent quote:** "Sustainability tends to be a side effect that is assessed when the project has ended."

- **Post-its summarizing findings from multiple respondents:** 1) Drivers for the investments in innovation projects are usually the reduction of lead time and cost. 2) Projects' sustainability impact is assessed ex-post and arbitrary.

- **Patterns:** 1) Sustainability is a secondary aspect of the innovation strategy. 2) Sustainability is considered mainly in a post innovation phase, rather than driving the initiation of new projects.

- **Insight:** We want a more sustainability-oriented innovation strategy to support the company's shift towards energy transition, but we continue to put more trust in the conventional market logic and place emphasis on economic concerns.

*Ethnographic study on drivers, practices, and challenges in establishing values-based innovation cultures for sustainable business impact, conducted by R. Montera, A. Monti, M. Rapaccini in 2022 for the IMPACT project