

The Ad Hoc

Research Thinking Field Guide

CASE STUDIES



Introduction

At Ad Hoc, we believe that research is more than just collecting data. Research is about helping people make better decisions, and it should be an integral part of how any team develops products and services. That's why we made [the Ad Hoc Research Thinking Field Guide](#).

Research Thinking (ReThink) is a powerful tool that applies to situations far outside the reach of traditional “check the box” research. The easiest way to demonstrate its large potential is to show you how the framework can facilitate better decision making in the areas of strategy, customer experience, and decreased risk.

- ReThink for Strategy
- ReThink for Customer Experience
- ReThink for Risk Reduction

In each case, ReThink provides a valuable check to guesses and assumptions and a framework for understanding likely outcomes, enabling far better decision quality. Let's begin with an illustrative case study.



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ReThink for Strategy

Priya Chatri is the executive director of a national non-profit fighting teen drug addiction. The organization delivers well on their programs, but the need in several key cities is greater than they can meet. Priya and the Board would like to expand services to help more at-risk teens in these cities, but that will require more money. Their funds are currently limited to small-dollar donations and some small grants, so they will need a significant change of strategy in some direction to succeed.

The Board members and Priya take a Research Thinking approach. They frame open questions and assumptions around potential fundraising, and note the decisions they will need to make. Priya acknowledges the high stakes; any money they spend on this initiative will come directly out of other budgets. They cannot afford more than one or two attempts, and the strategy has to pay off and raise more funds, or in the end they will serve even fewer at-risk teens.

After researching assumptions and questions, they discover that their small-dollar donors have historically given the most money in response to detailed true stories about specific teens the organization has been able to help. Larger charitable-funding organizations have responded positively to questions about funding, but they indicate they would also like to see programs with proven success. So, after studying which of the non-profit's ideas is most likely to result in the gains they want to see in the specific cities, Priya and her team set up a small pilot program to deliver new services to a targeted group in a specific city.

The pilot program is successful, and twelve teens are supported with detox assistance, an intensive support group, and GED classes. One year later, the stories they inspired have brought in \$2 million in small donations and large gifts, and the non-profit is able to radically expand services in two of the target cities.

Now, the non-profit returns to the question of how to advance its mission again, and they once again apply Research Thinking to find and prioritize their next steps.

Weighing competing options

Research Thinking is uniquely suited to informing strategy that weighs competing options. The framework can guide you, like Priya and the non-profit, through articulating your north star outcomes and decision trees, helping you discover the information with which to make your decision. ReThink assembles solid data across people, systems, policies, and organizational boundaries, with a variety of perspectives, allowing you to interpret that data in practical terms. By questioning and researching assumptions and the present state, the framework leads to deep knowledge of pain points and potential opportunities that become invaluable to a strategy discussion.

By the time you have completed the Research Thinking process, you are armed with solid information about the likely impacts of each option, and you know which levers to pull to get the outcomes you want. The strategic decision becomes informed.

ReThink for Customer Experience

Amanda Martin is the CTO of a state unemployment agency. The agency wants to increase online benefit applications and improve customer experience (CX). A large percentage of online applications are currently abandoned part-way through the process, and some of those applicants then seek help with agency personnel on the phone or in person. Some also never return.

The agency worries that not all eligible individuals are able to access benefits due to possible CX issues. Amanda is tasked with making the online benefit application process work better for applicants.

The agency decides to take a Research Thinking approach. Amanda knows that her challenge will also require traditional usability testing eventually, but the larger picture of CX is far more important. She works with other departments to research the entire application experience, from beginning to end, so that they understand the pain points and root causes of applicants' challenges.

- How do people learn about unemployment benefits?
- What is required to apply and prove eligibility?
- What technologies and systems are involved and how do they affect the process?
- How is the agency managing fraud and how does that impact the application?
- Where are applicants blocked or falling out of the process online? Where is that true on the phone or in person? What do these journeys have in common?

Amanda assembles many data sources in order to assemble a complete customer journey map for the agency's application process. Then, she uses ReThink approaches and the remainder of the data to make decisions about improving the online experience specifically. She and the team identify actions that will have a high impact on improving experiences, and develop roadmaps to address them.

Two years later, CX measures have improved dramatically, and the application abandonment rate has dropped by 60%. The head of the state unemployment agency tells Amanda they have worked miracles, and Amanda takes her team out to dinner to celebrate.

Creating better customer experiences

As Amanda and her team discovered in the story, Research Thinking is particularly valuable for CX. Building a deep understanding of complex systems allows for a more effective approach to the changes needed to promote good CX. Understanding employee drivers and pain points in particular can often create outsized impact in allowing processes to shift to better meet customer experience needs. The ReThink process specifically seeks out that deep-level understanding of users, stakeholders, employees, policies, and systems, with a specific attention to the potential impacts of actions. It allows customer journey information to become actionable, and practical.,

ReThink helps uncover the most effective levers to pull to improve CX, and to understand how the larger ecosystem is impacted. That makes effective CX work dramatically easier.

ReThink for Risk Reduction

Tyreek Jones is a deputy commissioner for a high-profile federal agency that requires regular reporting from organizations that receive its funding. The reports are used to evaluate the quality and effectiveness of the funded organization and ensure the federal funding is used as intended. Because the programs are so high profile, the quality reports generally receive national news coverage every year when they're released.

The federal agency is considering simplifying the reporting format and requirements. They're complex, time consuming, and costly for the funded organizations, and time-intensive to review for the agency. At the same time, any change would necessarily be risky. Lessened reporting requirements could compromise the agency's ability to detect when a funded organization is not performing adequately. Even if the reports function well for the purpose, journalists may wrongly frame the changes to the reporting as changes in quality expectations, reflecting poorly on the agency.

Tyreek must determine whether the risks outweigh the potential benefits, and get agency stakeholders on board with his decision. So, he uses ReThink to reduce risk, deciding to gather data and roll out informed changes iteratively. He brings in consultants to help research where best to simplify the reports without harming any stakeholder or organization needs.

The team recruits a small subset of organizations to pilot the new reporting process, and receives simplified reports from these groups well in advance of the regular deadline. They gather data and make a determination: the simplified reporting serves the needs of the funded organization and the agency better, with no program impact.

They also gather data on how reporters have reacted to previous changes, and how press releases were framed, in order to help them speak directly to what reporters need to hear. They craft a press release with what they have learned, explaining to reporters in their language why the changes were made, and what the research process entailed. The press release is successful; at the end of the season, while the agency has received some criticism for the changes, the coverage has been remarkably similar to every other year.

Tyreek rolls the new reporting system out in full for the following season, secure in the decision's low risk for the agency. His colleagues remark on how much easier the new reports are to evaluate.

Tools to manage risk

The Research Thinking process naturally reduces risk, as it provides both a check on assumptions and detailed data about the ecosystem in which the decision is being made. A better understanding of complexity sharply decreases the risk of hidden dependencies and unintended consequences for end users and agencies. Decision makers using ReThink also work through scenarios and implications informally, evaluating proposed solutions with data from a variety of sources and perspectives. More sources lead to more risks being identified early so that they can be mitigated. The process itself decreases risk by its nature.

However, Research Thinking is also a good framework for reducing risk intentionally, as the focus of a project. It supports formal scenario planning with solid research, allowing for informed approaches to best cases, worst cases, and far-out cases. It allows for tools like future forecasting to be used more precisely and with more certainty, and for the future to be connected more easily to the present and to roadmaps.

Decreasing inaction risk

One of the largest risks in government is the risk of inaction. Decision makers often assume that inaction is safe, when in fact it can often be the riskiest decision available. Charting the risk of doing nothing against the other available options, with solid research, allows for a clear view and more confident decisions. It helps achieve better outcomes, as the benefit of those outcomes can be more directly weighed against the risks involved, including the risk of inaction.

Designing lower risk decisions

The best approach to decreasing risk is often in terms of the decision design. Small-stakes iteration allows for testing and adjustment over time with small stakes. One example is a pilot program that enables new ideas to be tested in smaller, lower-stakes environments. This allows decision makers to evaluate the effectiveness of changes in the real world on a small scale, and to identify potential problems while they are still manageable. ReThink directly supports iterative approaches, which allow for course correction, adaptation, and positive outcomes with much less risk of failure overall.

Data and iteration working together dramatically decrease risk and improve outcomes.



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Ad Hoc is a digital services company that helps the government better serve people. We collaborate closely with our partners to solve the right problems and deliver software solutions that work. In doing so, we give agencies confidence that their tools will effectively meet the demands of their mission and the needs of their users.

Work with Ad Hoc to take the next step in becoming an agency that uses a Research Thinking approach to transforming digital services. Learn more at <https://adhoc.team/rethink> or contact us at hello@adhoc.team.