

DESK RESEARCH

PREPARATORY RESEARCH

Your own preparation before you start your actual research or fieldwork.

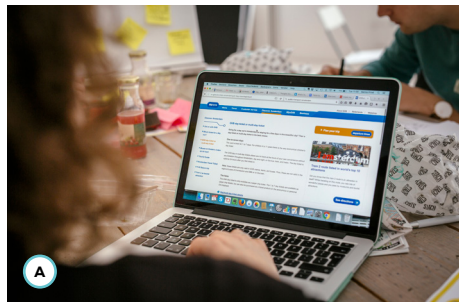
Duration	Preparation: 0–1 hours Activity: 0.5–8 hours Follow-up: 0.5–2 hours
Physical requirements	Computer with access to research databases (internal and/or external), publications
Energy level	Low
Researchers/facilitators	Minimum 1
Participants	n/a
Expected output	Text (other research), statistics, photos, videos

Preparatory research (or simply “prep research”) often includes digging deeper into the client’s perspective of what the research problem is: context, perceptions, internal conflicts, or interplays that may emerge during the project, and so on. Initial internal interviews in the organization are always very enlightening and provide a good starting point. Digging deeper also helps you recognize whether stakeholders are aligned in their vision and understanding of the problem or need that the research is seeking to address.⁰¹

The aim of prep research is to learn more about an industry, an organization, competitors, similar products/goods/services, or comparable experiences. Prep research can include screening social media posts or hashtags for a certain research field, keyword, technology, or industry. It can include reading not only industry-specific

⁰¹ See #TISDD 9.2.2, *Preparatory research*, for a brief description of the importance of prep research for the overall service design process.

scientific or special-interest publications but also newspapers or general-interest magazines, as well as listening to podcasts or conference talks and watching online videos. Also, it can include a quick co-creative session with team members, colleagues, users, customers, or stakeholders to learn which different perspectives you need to consider in your research and to identify potential leads for your further preparation and who might be a good fit to include in your research team. Often prep research starts with very wide research questions or topics. These topics may be soft (such as “What does home feel like?” or “What is trust?”) or more business-oriented (such as “Who are potential competitors?” or “Where else is this technology used?”). Prep research can result in a summary of text snippets, or a collection of photos, screenshots, or videos visualized, for example, as a mind map or mood board.



- A** “Prep” research often includes an online search for certain keywords, companies, and competitors as well as searching for any relevant publications and scholarly research on specific topics.
- B** It helps to mark the source of any piece of information you discover during your prep research. Also, use mind maps, spreadsheets, or mood boards to handle your mess of notes.
- C** Keep notes and explore potentially interesting topics iteratively.



Step-by-step guide

1 Define research question or topic

Start with a wide research question or topic. Prep research is mostly explorative, so keep an open mind and follow leads to other subjects that might be of interest.

2 Conduct prep research

Keep track of your references during your search: Where does the information come from? How old is it and how trustworthy is its source? Follow interesting links and references, or park them to explore them later. **Prep research is less about finding answers and more about finding the right questions to ask in your research.** It can help you to formulate more specific research questions or hypotheses. Wide and open research like this can also inspire you by learning what has been done already in different industries. This can help you to identify potentially interesting interview partners or can be the starting point for more resilient secondary research.

3 Summarize and visualize

Create a summary of your prep research, including conclusions but also assumptions or hypotheses for your later research. This can be more formal (as in a report) or more visual (as in a mood board or mind map). It's important to keep track of your references throughout your summary.

Method notes

- Sometimes a framing workshop with the client or management is useful as the final stage of prep research to ensure that everyone is on the same page regarding the status quo and research aim.
- Block a dedicated time slot, like one hour, for your initial prep research to avoid it becoming too excessive. If you find interesting topics, plan how much time you'll spend on each. ◀