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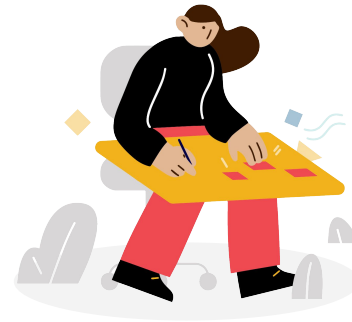Remote research & design primer
September 2021

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01 **What is remote research & design?**

What is remote research & design?

What is remote research & design?

Remote human-centered design research is in many ways similar to standard HCD. It relies on the same foundational philosophy of human centricity, is highly participatory and oriented towards co-creation, and is deeply interpersonal.

The biggest difference is the medium of interaction. Rather than physically going to participants' communities, homes, and businesses, we join them remotely, through audio and visual connections.

Digital tools, such as video conferencing and collaborative documents, enable teams and partners to creatively come together, even when remote from each other. However, to use them successfully, we must understand what these tools can do, and when and how to use them.

Fortunately, DD has experience with remote HCD. In the past, we have supplemented in-person research with remote methods when travel was not feasible, or the project context and budget did not allow for in-person research.

We have created a remote HCD toolkit to enable teams to conduct research and design without being physically present with research participants.

Our toolkit covers all HCD methods that are applied in a project (conducting research, testing concepts and prototypes, synthesizing outcomes, co-creating with teams).

It draws on best practices from in-person HCD research, while recognizing the technical and behavioral constraints and opportunities that come with digital channels. We're presenting this guide in a format that we hope is accessible to you, and anchored to the different use cases you're likely to face.
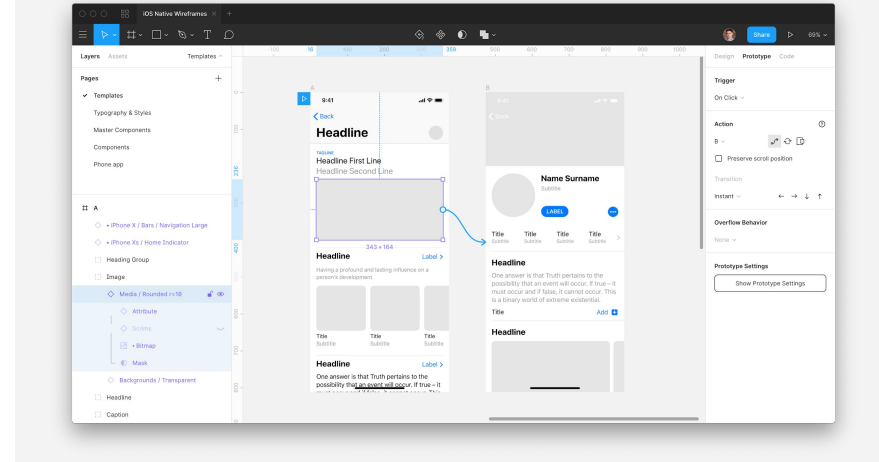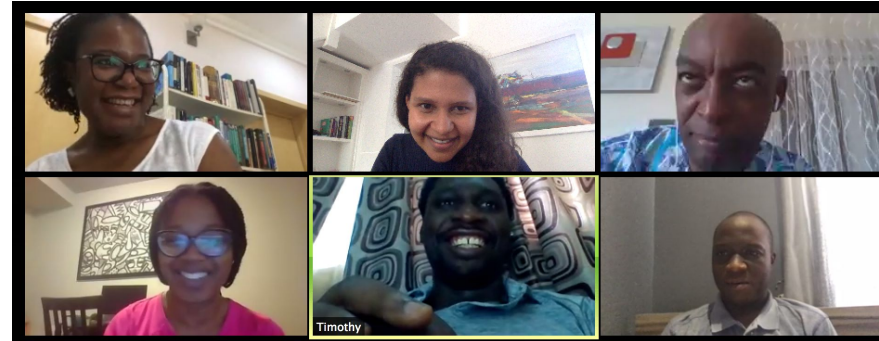
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Advantages

Remote human-centered design has some advantages over in-person HCD

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It's a more flexible approach to research
Remote research does not require a "sprint" based model where a team is forced to maximize its time in the community to conduct as much research as possible.

It can save on time because travel is not necessary
Teams no longer have to travel long hours, resulting in better work-life balance, and more time to learn from experts and secondary resources.

It can save on costs by reducing travel budgets
The remote approach cuts down on the costs associated with travel, but this is sometimes offset by higher samplings costs and longer timeframes for activities like research design

It can improve some aspects of sampling
Remote research can allow for larger sample sizes and a greater diversity of locations and participants, as no travel is required and interviews can be shorter and more flexible.

It can provide longitudinal insights more easily
Remote research can enable greater use of longitudinal methods, to capture insights over time.

It can improve convenience for participants
Remote interviews can be scheduled more easily around participants' availability and daily routines.

It is unequivocally better for the environment
Reduced travel and carbon emissions, and the use of virtual research materials instead of paper-based toolkits, help protect the environment.

It can improve participant anonymity
Remote research allows for easier anonymity, which can make participants feel more comfortable opening up, especially about taboo topics.

It can provide more opportunity for client participation
Clients can participate in sessions more easily, by simply dialing in, rather than having to travel, which takes more effort.

It can provide greater opportunity for capacity building
Remote research approaches can involve teaching HCD and general research skills to recruiters, fixers and enumerators (who are based in target communities), or training a remote field team.

Constraints

Remote human-centered design faces some constraints that in-person HCD does not

Participants' digital literacy and access may reduce reach
Some participants lack the skills, technology or telecommunications connectivity needed to meaningfully participate in remote research. Capacity building can help, but not always.

It may be challenging to establish rapport with participants
Developing a trusting, open relationship with participants remotely requires different approaches and a skilled interview team.

Improvisation is more limited, but just as important
Because of a limited ability to read body language and environmental cues, as well as limitations of digital tools, improvising with different approaches in real-time is more challenging.

Getting consent may take more time and care
Getting consent digitally can be tricky, and even more so when recording, transcription, and translation are involved, or when the research is executed by a third party.

Some segments are unreachable digitally
Certain target segments can be difficult or impossible to recruit without on-ground field staff, due to digital literacy and access challenges, or the difficulty of building trust remotely.

Controlling quality across digital sessions requires more care
Consistently achieving the same level of depth and quality across interviews can be more challenging. Aligning on the 'new normal' of quality beforehand is important.

Driving active participation and engagement can be harder
Conducting exercises and interactive activities is difficult, putting more emphasis on traditional interviewing and discussions.

Behavioral observation and media capture is more limited
The ability to directly observe and learn from participants' environments is more limited and requires special approaches. Audio and visual documentation of their settings is more constrained

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Implications on our notion of resourcing, quality, & outcomes

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Understanding participants context will need deliberate investment. Because our teams will not be in peoples communities, homes, and businesses, we will need to rely on local partners, especially interviews with community based organizations, or use 'show-and-tell' approaches to fill the gaps.

High quality learnings will require more interactions. Participants may not be willing to spend 2 consecutive hours on the phone for interviews, so teams may need multiple sessions and/or participants to deepen the scope for learning.

Representative sampling will require greater investment in recruiting and care in research design. In-person research teams have greater control over who they engage and how they pivot quickly to find participants as learnings evolve. We typically rely on local recruiters and community partners who recruit from their communities and can adapt in real time. Restrictions on movement may decrease their efficiency and agility. Moreover, limitations in participants

access to technology and digital literacy may make it harder to reach some groups and require low-tech research and co-design methods.

Visual storytelling will be limited. In-context research and design provides opportunities to audio-visually capture people's experiences, and elevate learnings through visual storytelling. Remote research and design may greatly reduce this scope, particularly in the absence of technical equipment and partners in community to facilitate the process. However, this also presents the opportunity to have participants more involved in telling their own stories, including them in the creative process (e.g. asking participants to share images of their surroundings and lived experiences).

Effective synthesis with distributed teams will require more time. Bringing along distributed team members and clients will also require greater rigour in documentation as well as synthesis.

02 **How do we do remote research & design at Dalberg?**

02
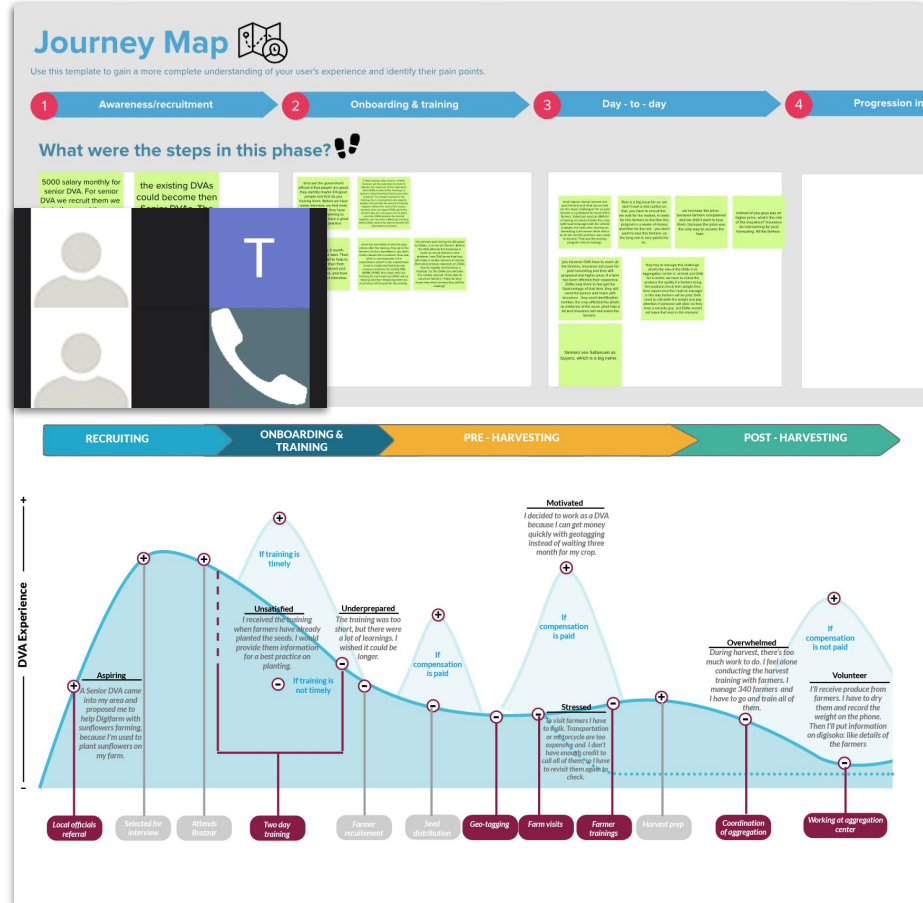
Process overview

The before, during and after of remote research and design

At Dalberg Design, any remote research and design project that we embark on will span the following three phases:

1. Plan & prepare

2. Research & design

3. Synthesis

In the follow section, we'll take you through each of these phases in detail and give you a sense of what you should consider as you work towards your goals. Along the way, we'll provide some tools, tips, case studies and resources that can help you kick start this process.

1 PLANNING
2 RESEARCH & DESIGN
3 SYNTHESIS

PLANNING	RESEARCH & DESIGN	SYNTHESIS
The remote nature of research and design requires planning that enables teams to collaborate remotely. This needs quick and creative workarounds to finding ways to reach the right set of participants, and conduct research and collaborate across stakeholders to align on directions emerging from outcomes.	While the practice of research and design remains the same in a remote scenario, it calls for the team to adapt the approach based on context, geography, digital infrastructure, etc. Certain methods may or may not lend well to being practiced remotely, as opposed to in person. It requires teams to find new ways to define research methods and outcomes for a project. *Note: Some intermediary synthesis happen in this phase. Refer to Section 3: Synthesis for details.*	All great learnings can see the light of day when the space for reflection and processing is created. When clients, teams and participants are remote, it can be harder to feel a sense of direction. Synthesis in remote engagements becomes even more critical to downloading learnings, pivoting approaches, bringing along clients and moving towards outcomes.

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02

Get into the right mindset, before we get to research

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Let project context drive methods
Think not just about the participants' context, but the project's context as well. Some methods allow for more discretion. Some allow you to observe digital behaviors. Some lend themselves well for longitudinal research. Consider what your project would benefit from when selecting your methods.

Rethink your approach
You may have strong in-person research skills, but this will only get you so far as you transition to digital-enabled remote research. **Think about how digital tools influence dialogue, collaboration, and outcomes differently than being in person.**

Meet your participants where they are
People have varying degrees of digital literacy, access, ownership and comfort. These digital realities also impact offline dynamics. For instance, a woman using a shared or surveilled phone might be more guarded. Learn about people's online and offline contexts before you select your tools.

Prepare for tech to fail
Tech challenges are inevitable, and often beyond our control - connectivity drops, electricity is unreliable, WiFi fails. While there are steps we can take to minimise the risks, it helps to **have contingency plans for things that could go wrong, so that you are better able to adapt in the moment.**

Think differently about time.
It can be harder to hold participants' attention in remote sessions, and tech hiccups may need to be factored in. Factor this into planning the duration of sessions and the size of group sessions.

Make mental health a priority
Many of the conversations and topics we explore in interviews deal with sensitive personal information that may be emotionally charged. **Prepare to provide support to participants and team members who may be distressed.**

Make clients remote-ready
When research is remote, it is easier for clients to be involved with all parts of the process. Set up norms with them, clarify roles and align on expectations early on, to make sure you collaborate smoothly.

Get into the right mindset, during research

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People behave differently online
For some people, a screen is intimidating, and can make them hesitant to contribute. For others, a phone call from home feels more natural, and they open up readily. **Recognize that people behave differently in digital settings, address participants' concerns, and ensure that they feel at ease.**

Get persona, remotely
Unlike in-person, you can't read body language and tone as clearly during remote communication. **Get to know participants ahead of time, put more effort into building rapport, and make sure participants feel heard and reassured even without nonverbal cues.**

Put extra effort into setting the context
Without an in-person introduction or visual signs, details about who you are and where you are from can be confusing. **To establish trust and ensure participants' expectations are realistic, be clear and transparent about the purpose of the session, and consider having a pre-call to help with context setting.**

Repetition is key, so is time for silence
Be ready to repeat and rephrase questions at different times during remote interviews, particularly around more challenging lines of inquiry. People also need time to process and reflect, respect silence.

Be careful of situational bias
If conducting research during crisis scenarios, such as Covid-19, questions around a participant's feelings of security or ambitions are likely to be influenced by the current scenario. Frame your activities and discussion guides with this in mind.

Treat data and privacy with care
People's data is especially vulnerable when digitized, and your remote research might involve new types of personal data (e.g. WhatsApp numbers and social media profiles). Consent can also be harder to take virtually, so build in privacy and consent processes in advance.

Test, iterate and learn
Be intentional about experimentation. Test your tools and technology before you begin, and use your first few sessions to try different research approaches, lines of inquiry, and activities. Learn actively, and refine for subsequent sessions. Create a safe space to fail by being gracious to yourself and your team.

02

How do we do remote
research & design at Dalberg?

1

Planning

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*Disclaimer: steps
featured are intended
to be done
simultaneously rather
than linearly*

**Align on goals, roles
& limitations**

Get everyone, from the clients to the
core team members, to agree on
roles, research goals, remote
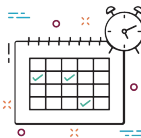capabilities, opportunities
and limitations

**Assess
literacy**

Assess digital and language literacy,
participants' familiarity and access to
digital tools, and the need for
translation services

**Chose methods
& design activities**

Select the methods that best match
your research goals and remote
capabilities, and create the tools and
materials you will need

**Prepare
research schedule**

Prepare a schedule that makes
effective use of the available time by
determining the opportunities and
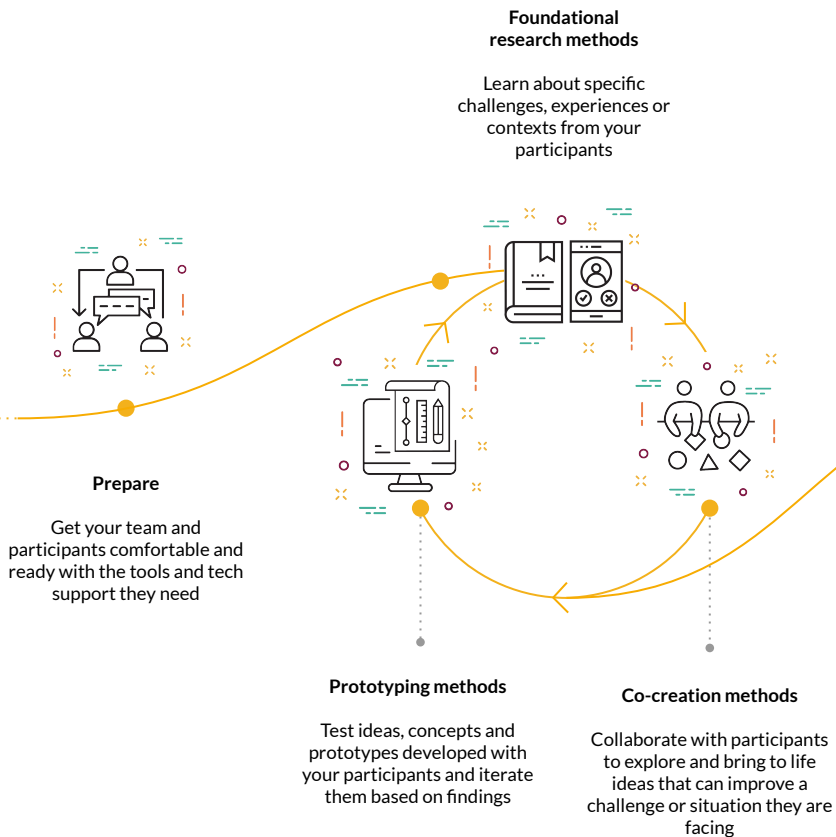constraints of the project's timeline

**Recruit
participants**

Weigh all available options and
resources, and find the best one for
recruiting participants

**Test-run
your approach**

Test your chosen research activities
and technology setup with a group of
participants and iterate your
approach

How do we do remote
research & design at Dalberg?

2

Research
& design

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Foundational
research methods

Learn about specific
challenges, experiences or
contexts from your
participants

Prepare

Get your team and
participants comfortable and
ready with the tools and tech
support they need

Prototyping methods

Test ideas, concepts and
prototypes developed with
your participants and iterate
them based on findings

Co-creation methods

Collaborate with participants
to explore and bring to life
ideas that can improve a
challenge or situation they are
facing

How do we do
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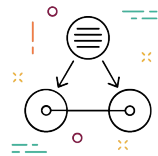design at Dalberg?
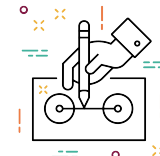
3

Synthesis

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Daily downloads

At the end of every few remote research sessions, take a moment to regroup with your research partner or reflect on your own.
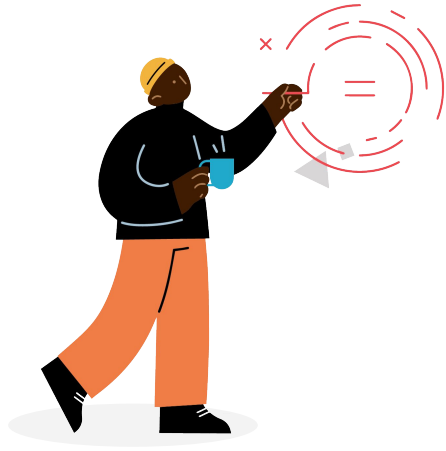
Affinity mapping

Ideally, remote affinity mapping requires teams to work together in real-time and engage through a mix of digital tools.

Insight statements

In the absence of a collaborative space, assign clear roles to sustain the insight writing process.

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03 **Case studies of remote research & design methods at Dalberg**

04

Interviews for efficacy of India's Covid-19 relief package

For our first phase of research, we completed 48 interviews. With the country under lockdown, these were entirely remote, via phone calls.

Interviews lasted 30-50 minutes. We also did some shorter sessions (20-30 minutes), which were useful in getting targeted inputs.

We did not have a lot of difficulty holding attention during the interviews, though it took a few initial moments in each call to get accustomed to volume and lags.

We chose not do activities in our interviews, because they would have demanded more time. Since the purpose of this research was to combine with a DA survey, the kind of insights needed were more specific, too.

LEARNINGS

- **Note taking is different for phone interviews.** Since there were no activities, documentation was more straightforward. Without video, we didn't have to worry about maintaining eye contact, either. This allowed the interviewer to take notes themselves, which freed up the team to cover more interviews per person. Sometimes there were pauses while we took notes, but this often worked to our advantage, as it gave participants more time to reflect.

- **Use the time saved creatively.** Because we didn't have to travel and could cover more people, we had time for secondary research and interviews with NGOs and experts to supplement our user research.

- **Remote recruitment and scheduling can be more communication intensive.** With in-person research, coordination with the fixer/recruiter happens more seamlessly once we're on the ground. Here, continuous coordination is needed, and everything is done over phone calls and WhatsApps, which require constant effort. We would touch base with the recruiters before and after each interview, and again at the end of each day to plan for the next.

- **When using third-party recruiters, try to use someone you've worked with before.** If they are already familiar with DD's work and ways, you don't have to invest in training.

- **Think about gender.** The recruiter was present on each call, as he arranged the call, introduced us to the participant and sometimes served as a translator. For some women participants, we sensed some hesitancy opening up in the virtual presence of the male recruiter.

"Remote interviews can be spread out differently. There's no need to recruit in one go, because unlike in on-ground research trips, every minute of the day is not important."

- Dalberg team member

The team (virtually) presented early findings from the first round of research at a Secretaries meeting

METHOD
Interviews

TOOLS USED
Phone call

PROJECT CONTEXT
Dalberg is leading a rapid, multi-round study across 15 Indian states to capture the cumulative efficacy of government entitlements in helping Below Poverty Line (BPL) families navigate the financial impacts of Covid-19. We are combining a large-scale survey of 18,000 BPL households (conducted via the phone) with qualitative human-centered design (HCD) research with 100 people.

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USAID DPV ring group discussion

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Starting conversations about sexual health can be challenging. For this project, the design team engaged with young women with no firsthand experience with antiretroviral (ARV)-based prevention options, including the DPV ring. The team had to creatively uncover how to support ring introduction and use, and looked holistically at young women's SRH lives to find parallel insights.

In the immersion phase, to understand existing needs, behaviors, barriers and opportunities, the team created local **WhatsApp Lady Chat groups.**

The WhatsApp focus group helped the team **unlock additional insights** from young women participants, and to find out what topics young women were interested in discussing and what types of information they needed, and lacked.

The group had **chat challenges**, with simple questions about life, beauty, health, and relationships. **Women shared back answers and pictures**.

The DPV team also connected the group with **local counselors and facilitators** who were providing services to adolescents.

This research method also validated that in certain contexts, such as urban and peri-urban South Africa, **women were receptive to lightly moderated peer-to-peer support communities.**

LEARNINGS

- **Combine methods to unlock additional insights.** The group members were young women who had been participants in in-person, one-on-one HCD interviews, and were included in the group after getting their consent and building a rapport. The groups added a new layer of insights to those gleaned from one-on-one sessions.
- **Virtual groups can allow people to open up in new ways.** The virtual nature, and longer duration, of the Lady Chat groups allowed the team to build the trust needed to have intimate conversations.
- **Align your methods with your participants' habits.** The young women participants were active and comfortable WhatsApp users, making the platform an ideal one to engage with them.

"Intimate conversations take trust and time."

- DPV Design Guide

Lady Chat WhatsApp groups were a way to unlock additional research insights. Have a look at the DPV design guide to learn more about the project.

METHOD	TOOLS USED
Group discussion	WhatsApp group

PROJECT CONTEXT

USAID and the International Partnership for Microbicides sought to use human-centered design to increase and sustain use of the daprivirine (DPV) ring – the first long-acting, woman-controlled method for reducing the risk of HIV infection – by better understanding and engaging young Sub-Saharan African women (18-24) and their influencers in the patient journey. User research was conducted in South Africa and Uganda, and we produced a guide to create design concepts and tools to increase the adoption and sustained use of the DPV ring.

Case studies

Card sorting for FHN:
tech adoption for LMI 50+

After two initial rounds of contextual research and prototyping sprints, **we facilitated a series of remote research sessions to validate the LMI 50+ identified fintech user journey with a bigger and more diverse pool of participants from the rural US landscape.**

The **recruiting team we hired**, Dynata, reached out to their community, and had people respond to questions on a screener. They then select participants based on the screener, and helped them set up the tech (computer, phone line, iTracks software) at their end.

We used the **iTracks software** for all of our sessions. Similar to Zoom, the software allows you to poll people, comment, share screen, and have participants, observers, facilitators, and a tech person on a call.

We created a card sorting activity where participants voted and shared stories on: their most pressing financial challenges; preferred and trusted channels to learn about financial products; favorite sources to visit when researching a financial product;

preferred tools and methods when learning how to adopt and use new technology; most used and preferred devices when managing finances.

The activity **led to highly engaging conversations between participants** when comparing their opinions and sharing their stories. **It informed the final user journey** and product agnostic recommendations.

LEARNINGS

- **People think about their data differently online.** We observed that people cared more about the use of their interview data during the online sprints, and asked about it more, in comparison to the in-person sessions.

- **In group discussions, the size of your team depends on the number of participants.** If we had groups of 5 or more participants, we needed to have someone to take notes exclusively, as it became too much for the facilitator to also manage the documenting.

- **Don't let your tools bias your sample.** Our sample was clearly people who had a computer and knew how to use it. Depending on the context of your research, this could lead to a very biased sample.

"One of the downs of this research sprint was that the only evidence we got was the screenshots of the call, and none of the beautiful portraits we were able to take in the in-person interactions. I think a final report with only video call screenshots loses its magic."

- Dalberg team member

The card sorting activity was used to get participants to vote and share stories on their financial challenges, trusted channels and preferred tools and devices. Explore the research tools they used in the digital sessions here.

METHOD
Card sorting

TOOLS USED
Google Suite, iTracks (by Dynata)

PROJECT CONTEXT
Dalberg worked with the Financial Health Network and AARP Foundation to improve digital financial service design for low- and middle-income Americans over the age of 50, a big and often overlooked segment in the fintech market. Over the course of 4 months, we conducted deep dive human-centered research and product feature prototyping with ~100 participants drawn from urban and rural communities across the United States. Through this research and subsequent design efforts, we developed product-agnostic recommendations for tailoring fintech design to the LMI 50+ segment and applied principles for improving the user experience across all phases of the customer journey, from discovery and adoption to navigation and sustained use.

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Ecosystem mapping for Lagos Business School

As part of our training for LBS on research and prototyping, we did a **training on ecosystem mapping.** For the training, we had Dalberg team members **simulate** the role of Nigerian interviewees, while LBS training participants facilitated the research exercise.

We carried out the activity **just like you would normally do ecosystem mapping**. The 'outline' section of the Mural board listed a series of steps to help the facilitator orient themselves around the map.

The simulations were carried out with one person serving as the **facilitator** to lead the questioning, one **note taker**, who would drag the noun cards and write notes on stickies (all on the Mural board), and one person as a **backstop**, to ask questions around any gaps or missing pieces, as well as to take handwritten notes behind the scenes.

The activity worked just as well in a remote setting – maybe even better, without the hassle of laying out the physical cards. But this simulation was a niche setting, in that both the interviewer and interviewee could

be connected on Zoom and Mural, and both were experienced and comfortable with the tools.

LEARNINGS

- **Online tool and activity familiarization demands more time.** Participants are not only trying to understand what they need to do but how to use the presented online tools to do so.

- **For online sessions, materials and tools need to be designed with easy navigation and wayfinding in mind.** Provide an intro email to your participants before the training introducing them to the assets they will interact with and where they can find them. Also, design trackers and guides within all your materials to reference time, location, and elements being used.

"I actually really think that this being remote was good. It forced us all to sit here for the day and really focus, and each of us was able to practice the exercise."

- LBS training participant
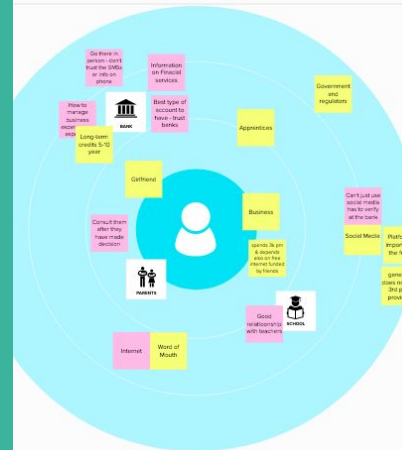
Access the Mural board that the LBS team used for ecosystem mapping here.

METHOD
Ecosystem mapping

TOOLS USED
Mural, Zoom

PROJECT CONTEXT
The Sustainable and Inclusive Digital Financial Services (SIDFS) initiative, funded by the Bill and Melinda Gates Foundation and based in Lagos Business School, established a Prototyping Lab with the mandate of supporting financial service providers (FSPs) to bring innovative products and services to currently underserved segments. Dalberg Design created a toolkit and training as part of the lab, to introduce a customer-centered design process that will support FSPs to design innovative, commercially viable products and services that satisfy the needs, motivations, and aspirations of their customers.

04

Digisoko DVA support journey mapping

In this phase of remote interviews with DigiFarm Village Advisors (DVAs) and delivery partners, we did a **journey mapping exercise to capture DVAs' journeys in each phase - awareness, onboarding & training, day-to-day and progression in role**.

This helped us understand how to optimize and support the DVAs in specific activities. It also provided an opportunity to identify potential support mechanisms that could be introduced along the DVA's journey.

For most interviews, **screen sharing was not possible** because of technology constraints, so participants could not see the journey maps. **Instead, we used the map template as an anchor for the discussion.** While we had a conversation with DVAs about their journeys, **the team collaboratively built out the map on Mural.**

The Dalberg team comprised of three people - one to lead the session, one to document, along with a fixer, who translated.

We also did the journey mapping exercise **with stakeholders and partners**. Here, we were able to **screen share the Mural template as it was being completed, and they followed along visually**. When we recapped after each section, we made sure to ask them whether they felt the journeys had been correctly mapped.

LEARNINGS

- **Pay attention to your biases**. In an activity like journey mapping, when the participant can not visually see the map, they are less able to engage with what you are trying to do. This may mean the interviewer leads with their own biases and preconceived notions about how the journey flows. The interviewer's skill, and alertness to when their own biases may creep in, are important.

- **Ensure you're asking the right questions.** If we had had more time, we would have done a few practice runs, to iterate on the journey map itself, and make sure covered the right buckets.

> *"When you're on a call with a participant, you are even more conscious of time. This means that you really need to focus your discussion very quickly while the person is still engaged, as it is more difficult to command their full attention virtually."*
>
> -   Dalberg team member
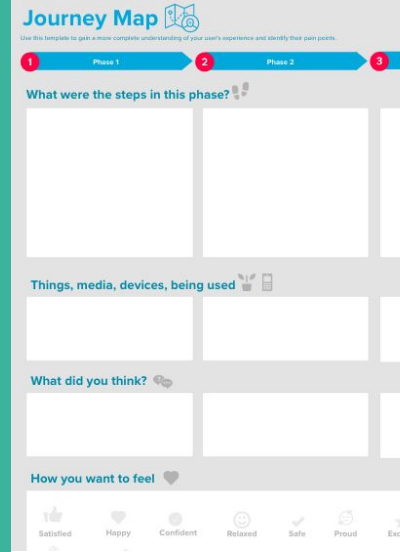
The team used this Mural template to anchor conversations on journeys in their phone interviews.

METHOD
Journey mapping

TOOLS USED
Mural, Zoom audio call

PROJECT CONTEXT

AgriFin has spent the last four years supporting the development of the DigiFarm product with partner Safaricom, by developing and implementing their product roadmap. As the product matures and implements its market access platform, DigiFarm has implemented a field force model – DigiFarm Village Advisors (DVAs) to help achieve its goals to increase farmer productivity, income, resilience and active use of platform services, as well as to increase women's participation levels. The DVA service was launched in October 2018 and has gone through several iterations of development.

RAF LL & Shell Foundation client pathways scenarios

While we moved ahead with our research on client pathways as the COVID-19 pandemic unfolded, we adapted our approach to **capture the effects of the crisis on the lives of the rural households we were investigating**. We also captured data points related to COVID-19 behaviors and attitudes longitudinally- taking a baseline-endline approach.

In order to probe participants on transition points in their life, which can be abstract to think about, we came up with a few **short, hypothetical scenarios** that participants may have be facing. **We chose these scenarios in a brainstorm session with the clients.**

After we **read out the scenarios to participants in the interview, we probe to understand what they would do if this happened to them**, gauge attitudes and potential strategies that people may use to address the scenarios.

We will use the scenarios once again in the **second end-line phase of the research**, which will take place during or after the peak of the pandemic. This will help us assess the actual shocks that occurred, and any attitudinal shifts.

LEARNINGS

- **Audio phone interviews have turned out to work surprisingly well.** We initially tried to do the interviews over video call, by having a fixer go to participants with a laptop and set it up, but connection was poor and it ended up being more frustrating for all involved.

- **Plan for interview durations differently.** In some cases, calls have lasted longer than in-person interviews because of the need for repetition due to connectivity challenges.

- **Digital worksheets make synthesis easy.** We logged participants' responses on digital worksheets on Mural. It has been an effective way to capture insights visually, and has aided the synthesis process.

"People have come across more comfortable and open on the phone than many in-person interviews we've conducted in the past. It might be participants are more familiar with sharing information with a stranger over the phone than having them in their house."

- Dalberg team member

PATHWAY 1&2: *Has your household income been impacted by Covid over the past 4 weeks (probe for types of income)*

PATHWAY 2: *A farmer is deciding whether to lease their neighbor's plot again this year but decides not to due to market uncertainty*

PATHWAY 1&2: *Has the current situation affected your household's ability to send and/ or receive remittance?*

PATHWAY 1&2: *A local loan provider defaults and credit for farmers to buy inputs dry up, in turn meaning farmers in their portfolio face low yields and backward transition to subsistence farming .*

The team created 10 hypothetical scenarios to probe during interviews. Find more details in their *research guide.*

METHOD
Scenarios

TOOLS USED
Phone call

PROJECT CONTEXT
This project with RAF LL and Shell Foundation seeks to understand whether and how rural households transition through 4 priority pathways from the Rural Pathways Model, in order to equip stakeholders with a broader range of resources that can drive effective and inclusive social mobility. The project takes a blended longitudinal approach of 2 rounds of qualitative + quantitative research, at the early stages of the pandemic and during or after the pandemic, to assess change over time.

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Case studies

Medium fidelity prototyping for Gates-PCI Male engagement

Due to the COVID-19 lockdown, we were unable to go in the community to test our prototypes, and pivoted to 2 remote prototype testing sessions instead.

Our participants for both sessions were 3 members of the PCI **field team**, who had assisted us in previous rounds of research, and implement similar programs in rural Bihar. Reaching new participants was not feasible due to the lockdown.

We used a WhatsApp group to coordinate the sessions. We shared a single PDF with all the prototype collateral (in Hindi) on the group, sent out just before the call began.

The call was an **audio conference call using the Zoom toll-free number.** Some dialed in through the Zoom line, and those who found it challenging were added via regular conference call by a Dalberg team member. Our PCI clients also joined the session.

One Dalberg team member led the session. **We went through the prototype collateral PDF together, one image at a time**, and asked questions from a discussion guide. Participants shared their critiques in a free flowing conversation, and we verbally ideated on how challenges could be solved. These one-hour

sessions helped us fill gaps and build more nuance into our prototype design. **The call was recorded through Zoom, and one team member wrote notes.**

LEARNINGS

- **Make the most of platforms that participants are familiar with.** Since they were all active WhatsApp users, and we had communicated with each other through the platform in the past, the group was a comfortable space. WhatsApp also allowed us to use a mix of text and audio messages, in Hindi and English.

- **Even people with high digital familiarity face situational constraints, beyond our control.** Limited Internet bandwidth and connectivity, no electricity, sharing a smartphone with other members were some of the challenges that our participants faced, that we had not been prepared for the first time around.

- **Research is easier with participants you are already familiar with.** Having worked with our participants before, we were all comfortable with each other, and did not need to spend time explaining the context or building trust.

"We learned that even in non-Covid times, interactions like these can be pivotal to add the extra nuance to our detailed design when budget is limited for multiple in-person trips."

- Dalberg team member

Visual material for program prototypes were shared with participants via WhatsApp, and probed deeper on a call using this _discussion guide_.

METHOD
Medium fidelity prototype testing

TOOLS USED
WhatsApp group, Zoom audio call, phone call

PROJECT CONTEXT
Dalberg is working with PCI to develop interventions to increase men's engagement in family planning and nutrition, to improve outcomes in rural Bihar. The interventions will lead to a 3-month pilot and will leverage the women's Self Help Group (SHG) network, which works with the state's rural livelihood mission. The remote prototyping session took place while we were in the process of developing detailed designs for 2 prioritised prototypes, both of which were in a medium-fidelity stage.

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Additional case studies

As the pandemic progressed, we continued to apply and evolve our remote research methods and tools across projects.

You can read more about additional case studies in this document. We have captured process learnings from 11 different projects spread across various geographies and sectors. This is not an exhaustive list, and will be updated to include examples and methodological innovations as they continue to be implemented. Sample screenshots from the additional case studies document below.

Thank you!