

## Observations

This section captures observable behavior changes happening around you. Focus on actions people are actually taking, not opinions, attitudes, or what they say. Look beyond your own organization to adjacent industries, demographics, and cultural spaces. The goal is to notice without immediately jumping to conclusions about why.

### Examples

- People spending hours in coffee shops with laptops, treating them as workspaces
- Customers buying athletic shoes but never using them for sports
- Donors under 40 giving smaller amounts more frequently instead of annual large gifts
- Job postings emphasizing 'remote-first' or 'flexible location'
- Retail stores adding cafes, seating areas, and event spaces
- Book buyers browsing in-store but purchasing online
- Members attending virtual events but not returning to in-person gatherings

### Low-Fidelity Research Methods

- Social media scrolling - Browse TikTok, Instagram, Reddit to see what people are sharing and doing
- Your own behavior - Notice when you or people around you start doing something differently
- Retail/community observation - Visit stores, coffee shops, gyms and watch what's busy, empty, or changing
- Casual conversations - Pay attention to what friends, family, and colleagues mention repeatedly
- Comment sections - Read reactions on news articles, YouTube videos, social posts

### High-Fidelity Research Methods

- Ethnographic observation - Shadow your customers/beneficiaries for a day to observe actual behavior
- User interviews - Conduct 10-15 structured interviews asking about behavior changes over 2-3 years
- Sales/analytics data - Analyze your own data for patterns (what's growing, declining, shifting)
- Industry reports - Read formal market analysis and demographic studies
- Competitor analysis - Systematically study what similar organizations are doing differently



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# Moments

This section identifies specific events or crises creating urgency right now. These are time-bound occurrences that trigger reactive behavioral spikes—things like economic shifts, natural disasters, policy changes, product launches, or cultural flashpoints. Moments are datable and create immediate responses (which may be temporary).

## Examples

- Pandemic forces mask-wearing in public
- Amazon launches Prime with free 2-day shipping
- iPhone announcement signals mobile-first future
- 'Bowling Alone' book becomes cultural phenomenon documenting social isolation
- Major economic downturn reduces discretionary spending
- New privacy regulations force digital advertising changes
- High-profile organizational scandal shifts trust expectations

## Low-Fidelity Research Methods

- News headline tracking - Follow major stories making headlines in your sector
- Google Trends - See what searches are spiking when
- Trending topics - Monitor what's trending on Twitter/X, Reddit, LinkedIn
- Your own timeline - Track major events in your organization's world (funding changes, competitor moves)
- Industry newsletters - Note announcements about launches, closures, pivots

## High-Fidelity Research Methods

- Media monitoring tools - Use Google Alerts, Mention, or news aggregators for systematic tracking
- Economic indicators - Review formal data on employment, spending, or investment patterns
- Policy/regulatory tracking - Monitor government actions, new regulations, funding announcements
- Event calendars - Track major industry conferences, product launches, organizational milestones
- Crisis timeline documentation - Create detailed chronologies of major events with dates and impacts

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# Intersections

This section looks for patterns where moments amplify movements. When you see multiple unrelated observations and specific moments pointing in the same direction, you're likely seeing a real cultural shift. This is where you ask: Are temporary moments accelerating longer-term behavior changes? Where do we see the same signal across technology, economics, demographics, and culture simultaneously?

## Examples

- Third place movement (people seeking community spaces) + 'Bowling Alone' crisis moment = Physical spaces must offer experience/belonging, not just transactions
- Online shopping growth (observation) + Prime free shipping launch (moment) = Convenience becomes permanent expectation, not temporary preference
- Young professionals moving to cities (observation) + Remote work explosion (moment) = Location preferences fundamentally shifting
- Wellness as identity trend (observation) + Pandemic health focus (moment) = Performance gear becomes everyday wear
- Trust in peer recommendations (observation) + Influencer marketing rise (moment) = Traditional advertising losing effectiveness

## Low-Fidelity Research Methods

- Pattern journaling - Keep a running list of observations and review weekly for connections
- "I'm noticing..." conversations - Ask colleagues what they're seeing and compare notes
- Cross-industry browsing - Look at completely different sectors and find parallel patterns
- Whiteboard mapping - Draw connections between your Observations and Moments sections visually

## High-Fidelity Research Methods

- Workshop facilitation - Run structured sessions with your team to map connections systematically
- Expert interviews - Talk to thought leaders, academics, and consultants who study cultural trends
- Scenario planning - Use formal frameworks to explore "what if" combinations
- Comparative case studies - Analyze how other organizations responded to similar intersections
- Data correlation analysis - Look for statistical relationships between different trend indicators

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# Insights

This section synthesizes what patterns collectively reveal about what people actually want. Move beyond describing what's happening to understanding why. What do new behaviors reveal about unmet needs and desires? What is driving these changes? What do people value now that they didn't value before (or vice versa)? State these as declarative truths about human needs.

## Examples

- Belonging over transactions - People will pay a premium for spaces where community happens, not just for products
- Convenience as baseline expectation - If it's purely transactional, people want it delivered instantly
- Authentic connection over performative engagement - People can detect manufactured community and reject it
- Wellness as identity, not just activity - How people move and care for their bodies reflects who they are
- Flexibility as non-negotiable - People refuse to return to rigid work/life boundaries
- Peer validation over expert authority - Trust what 'people like me' experienced over institutional credentials

## Low-Fidelity Research Methods

- "What does this reveal?" questioning - For each intersection, ask "Why do people want this?"
- Empathy mapping - Put yourself in the customer/beneficiary shoes and articulate their perspective
- Small-group discussions - Talk through patterns with 3-5 colleagues to surface different interpretations
- Reddit/forum deep dives - Read extended conversations to understand motivations behind behaviors

## High-Fidelity Research Methods

- Focus groups - Test hypotheses about what people want with actual stakeholders
- Jobs-to-be-done interviews - Use structured interview methods to understand underlying motivations
- Survey validation - Quantitatively test your insight statements with target audiences
- Academic research review - Read behavioral psychology, sociology, consumer research on related topics
- Advisory board validation - Present findings to external advisors for reality-checking

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## Pause or Go

This is your decision checkpoint before moving to action. Given everything you've learned, is this worth pursuing? Or, would it be better to pause and monitor? Before investing time in the Opportunity section, ask: Should we act on this insight, or is it worth pausing, waiting, or ignoring? Consider: Does this align with our mission? Do we have 5-10 years to act, or is this urgent? Are the movements strong enough that moments are truly amplifying them, or is this just noise?

### Examples

- GO - Act now: If these trends continue, our entire 170-store model fails within 5 years. We have capital and time to pivot but must start immediately.
- PAUSE - Monitor closely: The signals are real but our current model still works. Set quarterly check-ins to track velocity. We have 3-5 years runway.
- GO - But test first: Strong enough to warrant action, but too risky to commit fully. Run 2-3 pilots over 18 months before scaling.
- PAUSE - Not our fight: These trends impact adjacent sectors but our niche remains stable. Worth watching but doesn't require a response.
- GO - Mission-critical: Even if trends weren't happening, our mission requires we move this direction. Trends just add urgency.
- PAUSE - Wait for clarity: Moments are noisy right now. Wait 6-12 months to see if this is a permanent or temporary spike.

### Low-Fidelity Research Methods

- Gut check conversations - Ask 3-5 trusted advisors: "Does this feel urgent to you?"
- Timeline mapping - Sketch out "what happens if we wait 1 year? 3 years? 5 years?"
- Mission alignment test - Does acting on this move us closer to or further from core mission?
- Resource reality check - Do we have the time, money, and capacity to act even if we wanted to?
- Regret minimization - "Will we regret acting too early or waiting too long?"

## High-Fidelity Research Methods

- Scenario planning - Model outcomes for "Act now," "Wait 2 years," and "Don't act" scenarios
- Financial stress testing - Run projections: how long before current model breaks if trends continue?
- Board/leadership alignment - Formally assess whether key decision-makers see the urgency
- Competitive response analysis - Track how fast competitors or similar organizations are moving
- Risk assessment matrix - Evaluate risk of acting vs. risk of inaction using formal frameworks
- Strategic options analysis - Use decision trees to map consequences of different timing choices

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## Moments

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## Impact

This section honestly assesses which of your organization's core assumptions are breaking down. Every organization is built on assumptions about what people want, how they behave, and what they value. If the trends you've identified continue for 5-10 years, which assumptions become obsolete? This should be uncomfortable—you're naming what's at risk. State each as "Assumption → Breaking because..."

### Examples

- Physical retail is for browsing and buying products  
Breaking: People want experiential gathering spaces, not product shelves
- Our suburban locations serve customers well  
Breaking: Target demographics living in urban walkable areas
- Donors give because of our mission expertise  
Breaking: They want to see themselves reflected in our organization
- Members come to us for information  
Breaking: Information is free everywhere; they want connection and application
- In-person gatherings are the gold standard  
Breaking: People value ease over driving/flying to meetings
- Current customer base will sustain us  
Breaking: Base is aging with no younger cohort replacing them
- Professional credentials establish trust  
Breaking: Lived experience and peer recommendations carry more weight

### Low-Fidelity Research Methods

- Business model canvas review - Look at your existing model and ask what breaks if insights are true
- "What if" scenario writing - Write out what happens if each trend continues for 10 years
- Honest team conversation - Create safe space for people to name sacred cows that might be breaking
- Financial trend review - Look at which revenue streams are declining and ask why

## High-Fidelity Research Methods

- Financial modeling - Run projections showing how trends affect revenue, costs, operations over 5-10 years
- SWOT analysis - Formal assessment of strengths, weaknesses, opportunities, threats
- Stakeholder interviews - Ask board members, long-time supporters what concerns them about the future
- Competitive positioning analysis - Map how competitors are responding to same trends
- Risk assessment - Use formal frameworks to evaluate probability and severity of impacts

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## Assets

This section identifies what you have that becomes more valuable given the cultural shifts you've identified. Not everything is broken. Some existing strengths (relationships, expertise, brand trust, physical spaces, capabilities, resources) may be exactly what people need in the new landscape. Reframe existing assets through the lens of your insights. State each as "Asset → Valuable for..."

### Examples

- 20-year reputation in the community → Valuable as a trust anchor when authenticity is scarce
- Relationships with 5,000+ organizational partners → Valuable for platform/network model instead of direct service
- Physical real estate in downtown area → Valuable for third-place experiences, not retail transactions
- Content creation expertise → Valuable for distributed digital content, not just print materials
- Deep subject matter knowledge → Valuable for curating/filtering quality, not just information delivery
- Mission-driven brand → Valuable when people want organizations aligned with their values
- No debt and reserve funds → Enables investment capital for transformation
- Email list of 150,000 engaged people → Valuable for community building, not just broadcasting

### Low-Fidelity Research Methods

- Asset inventory - List everything you have (relationships, skills, resources, reputation, locations)
- Reframing exercise - For each asset, ask "How does this become MORE valuable given our insights?"
- Strength-based conversations - Ask long-time stakeholders what they most value about your organization
- Competitor comparison - Identify what you have that competitors don't

## High-Fidelity Research Methods

- Brand equity research - Formally measure what aspects of your brand carry the most value
- Resource audit - Systematically inventory all organizational capabilities and resources
- Stakeholder value analysis - Survey or interview stakeholders about what they value most
- Strategic asset mapping - Use business strategy frameworks to identify distinctive capabilities
- Partnership exploration - Talk to potential partners about what assets they'd value accessing

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## Opportunity

This section designs your response using assets to serve what people actually want. What could you become over 3-10 years to stay relevant and effective? Use the assets you identified to build 2-4 concrete strategic options. The best opportunities align what you're uniquely positioned to do with what people increasingly need. Present options with enough detail to evaluate trade-offs, but don't lock into decisions yet.

### Examples

- Option A: Platform Model  
Close direct service programs, leverage partner relationships to become connector/curator. Use brand trust to certify quality. Transition over 5 years.
- Option B: Hybrid Physical + Digital  
Convert suburban locations to urban experiential hubs over 10 years. Launch digital subscription for distributed audience. Test with 2 pilot locations first.
- Option C: Membership Community  
Shift from event-based to year-round membership model. Use content expertise to facilitate peer learning. Maintain brand but change business model.
- Option D: Specialized Niche - Exit general market, go deep in underserved niche where assets are strongest. Premium positioning. Requires 3-year transition and different revenue model.

### Low-Fidelity Research Methods

- Brainstorm without constraints - Generate 10+ possible strategic directions before evaluating
- "What would Netflix/Patagonia/[analogous org] do?" - Borrow models from outside your sector
- Talk to innovators - Ask organizations that successfully pivoted how they made decisions
- Small experiments - Test elements of different options with low-risk pilots

## High-Fidelity Research Methods

- Strategic planning process - Use formal frameworks (Blue Ocean, Playing to Win, etc.) to develop options
- Business model prototyping - Create detailed financial models for each option
- Stakeholder co-creation - Engage board, staff, key stakeholders in developing and vetting options
- Pilot programs - Run time-bound experiments to test assumptions before full commitment
- Decision matrix analysis - Score options against weighted criteria (mission alignment, financial viability, asset leverage, risk level, timeline)