Mindful innovations: enhancing engagement with user insights
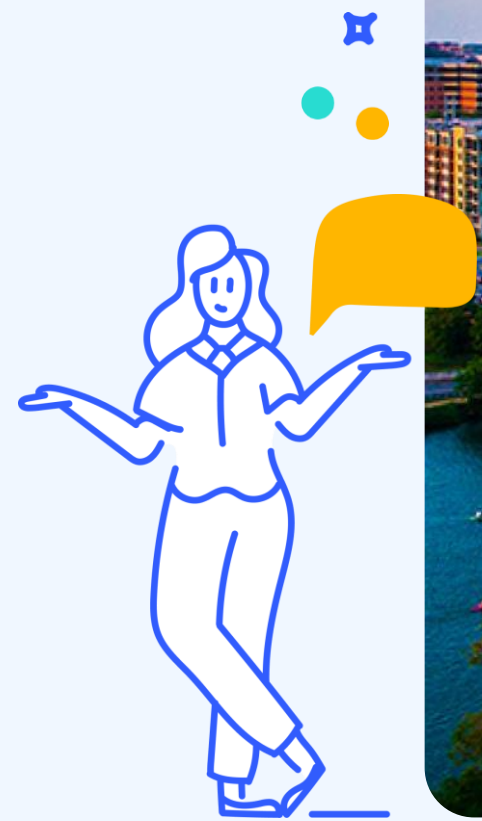
Chase Clark

Lead UX Researcher, Calm

Welcome to Austin! I'm Chase.

Lead UX Researcher
Calm

Take a deep breath.

Calm

Experience

Companies I've helped enhance engagement through innovation

2014—2016

Zipcar

Enable simple and responsible urban living.

2016—2018

ASICS

Getting the whole world running.

2019—2020

Workrise

Empower the people who power the world.

CURRENTLY

Calm

Support everyone on every step of their mental health journey.

Outline

Calm's insight to innovation framework

	Questions	Signal	Methods
Customer Who are you building for?	TAM, demographics, problems	Sizing, problems, satisfaction gap	Surveys, internal data, secondary research, and user interviews
Problem What problem are you helping your customer make progress with and why?	Size and severity of problem, problem workflow, what does progress look like	Stories, workflows, unmet needs	Qualitative interviews, problem mapping, secondary research
Concept Will your new concept help them?	Do they understand what it is? Does it solve the problem? Willingness to try, Willingness to pay	Comprehension, want, buy-in, efficacy	Card sorting, force ranking, prototype testing, customer co-design, general sneaky business
Feature How well do the features work?	Do they understand how it works? Can they use it? Do they love it?	Task completion	Usability testing

User Testing | THiS
The Human Insight Summit

Understanding customers

Understanding your customer landscape

- Identify your different customer types and the problems they're solving.

- Problems can vary in complexity and severity depending on the type of customer.

- Determine the size of each customer group and prioritize the severity of their problems.

- Some problems will have more impact than others (e.g., getting paid quickly vs. uploading photos).

What was the primary reason why you began using Calm?

Responses
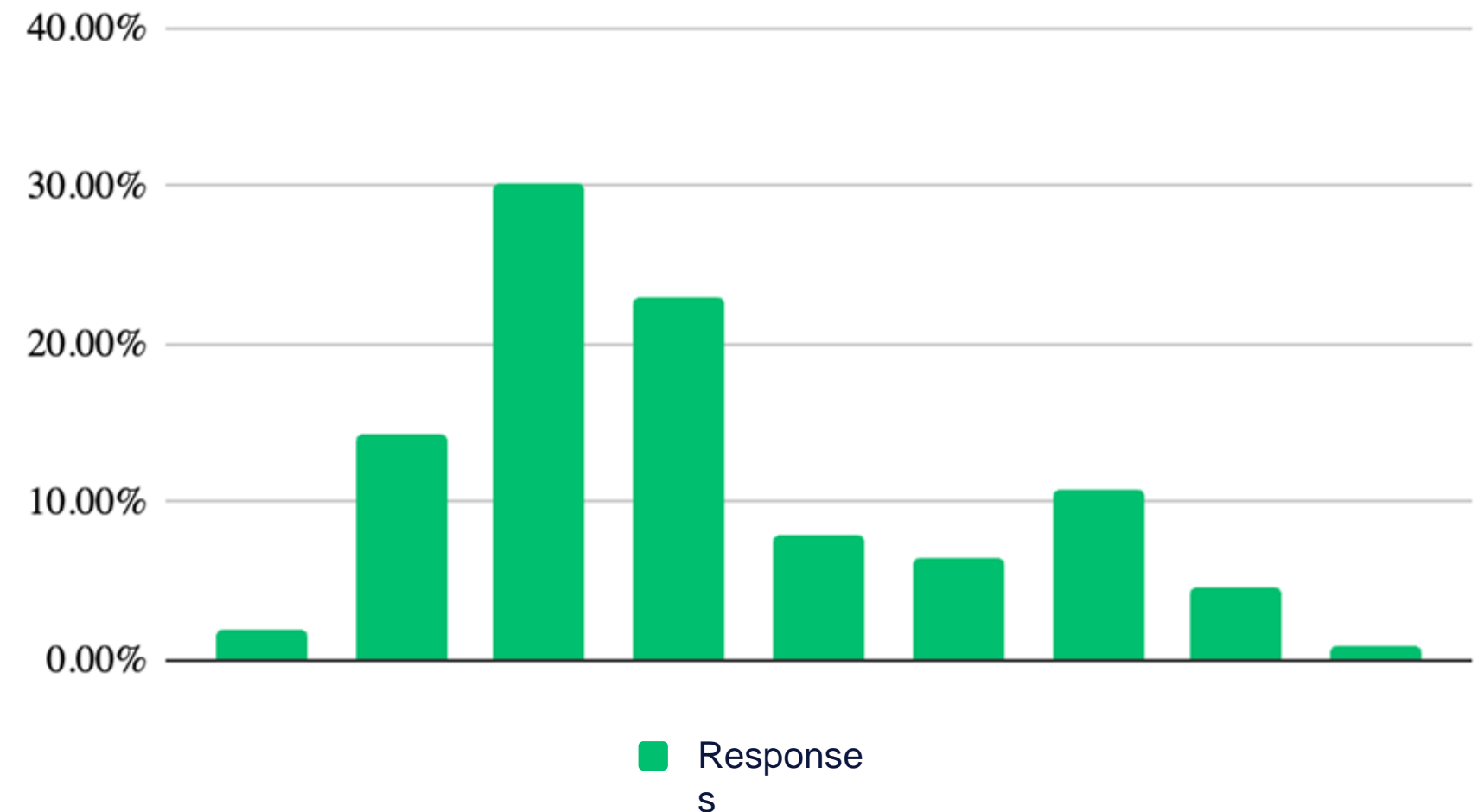
Understanding customers

Who are you building for?

Question to ask

- TAM: how big is this audience, but also how large is each archetype

- Demographics: how can we define them?

- What problems are they trying to solve?

Signal to get

- Size of audience

- Problems to solve

- Sizing of people with problems

- Satisfaction gap of problem and ability to solve

Methods to use

- Surveys

- Internal data

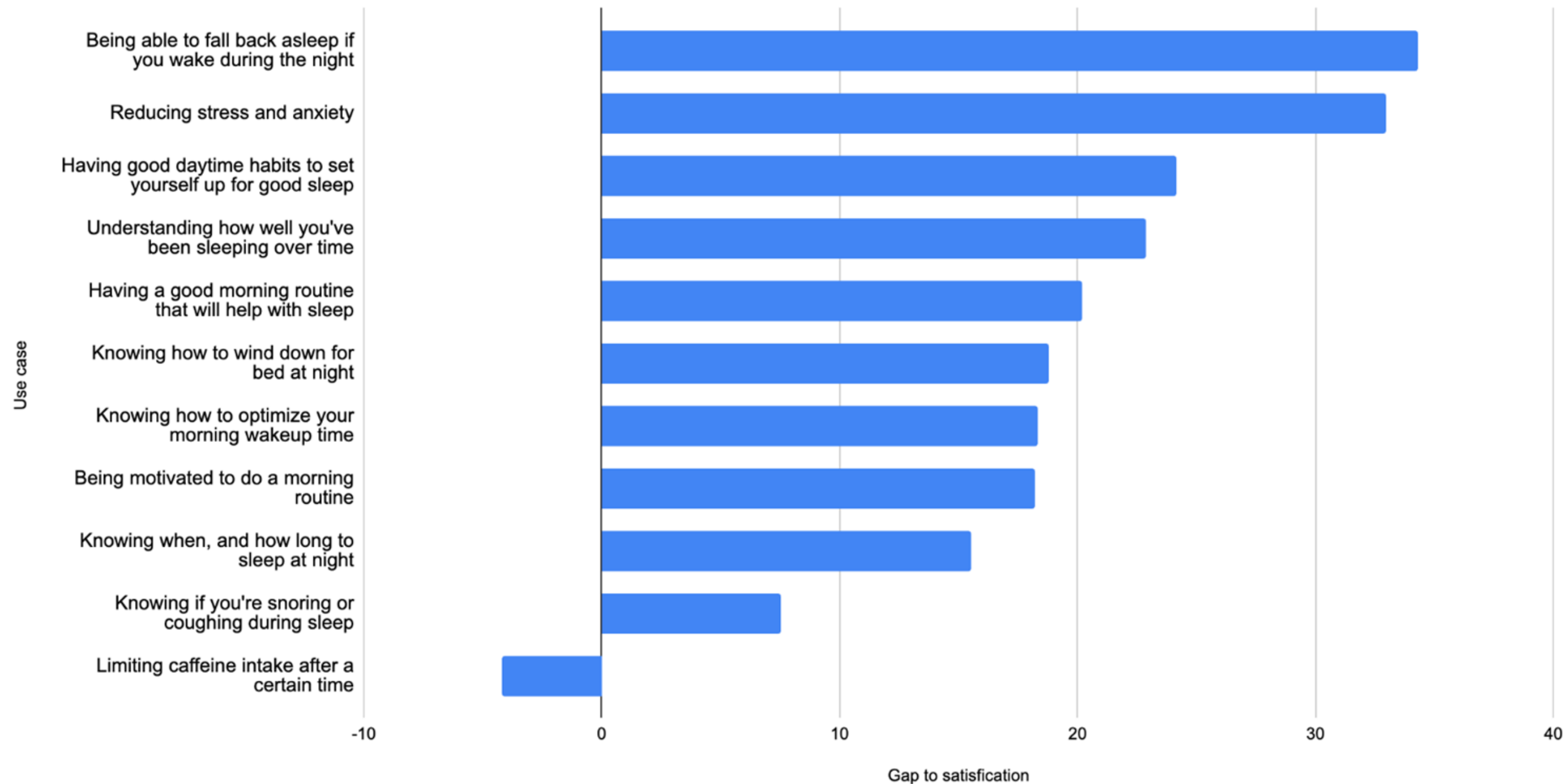- Secondary research

- User Interviews

Example survey — trouble sleeping

Highlighting what matters to customers, while revealing areas where they're dissatisfied with their progress.

Gap to satisfication vs. Use case

Use case	Gap to satisfication
Being able to fall back asleep if you wake during the night	34
Reducing stress and anxiety	33
Having good daytime habits to set yourself up for good sleep	24
Understanding how well you've been sleeping over time	23
Having a good morning routine that will help with sleep	20
Knowing how to wind down for bed at night	19
Knowing how to optimize your morning wakeup time	18
Being motivated to do a morning routine	18
Knowing when, and how long to sleep at night	15
Knowing if you're snoring or coughing during sleep	8
Limiting caffeine intake after a certain time	-4

Creating simple, actionable personas

Personas = Archetype + Problem

- Focus on behavior and core problem, no extra details.

- Example: *A "proactive meditator" focused on building a long-term meditation habit.*

Use key spectrums to categorize

- **Time commitment**: In a hurry vs. has plenty of time.

- **Reactivity:** Solving an urgent problem vs. long-term improvement.

- **Skill level:** Beginner vs. expert.

- **Knowledge**: Newcomer vs. experienced user.

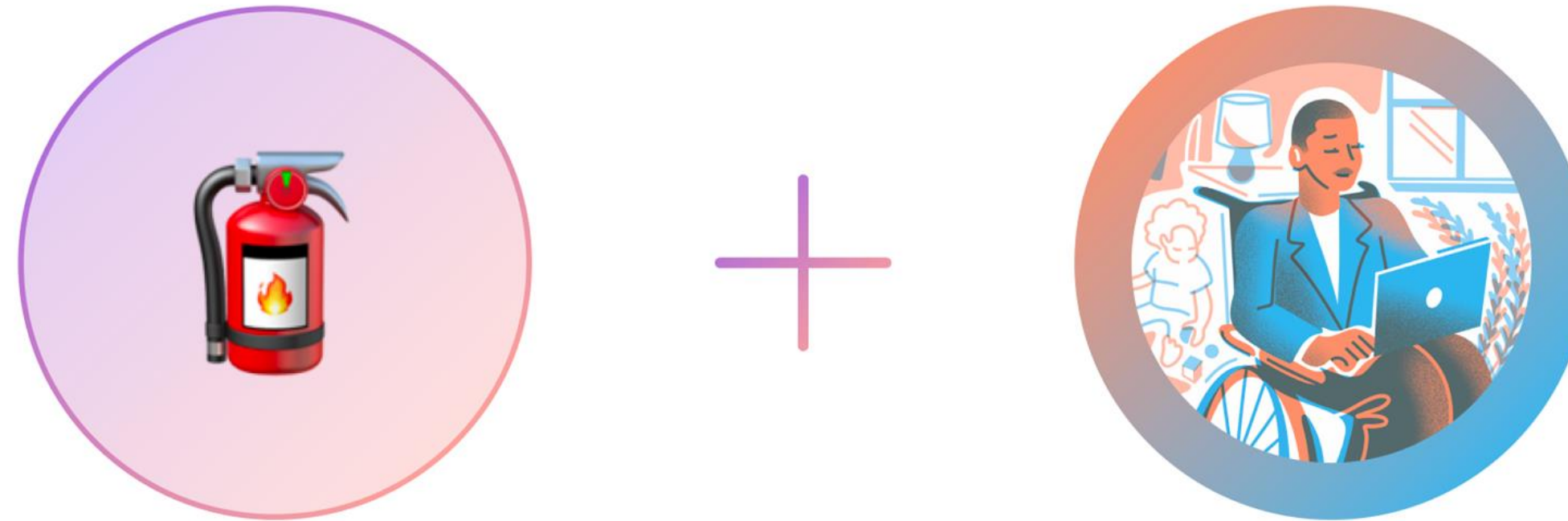- Tenure**: First-time user vs. long-term customer.**

POV: You spent six months created detailed customer personas

PM:

Tip:
Choose the spectrum that most impacts
how users interact with your product.

Calm uses simple personas that are a combination of **problem to solve** and spectrum of **reactivity/proactivity**. None of our personas have first names.

Tip:

Customer archetypes, problems, and personas should be simple to remember and naturally woven into your team's everyday conversations.

Diving deep into problems

Mapping user processes: a key step in innovation

- Interview users to understand their process and map out their journey.

- Identify the main problems users are solving and their size—this helps prioritize based on user needs.

- Dive deeper into specific problems to uncover blockers, unmet needs, and potential shortcuts.

- Example: For Calm, mapping out the sleep wind-down process revealed hidden blockers and needs.

- Mapping gives insights into user expectations, progress, and unexpected findings.

Tip:
Don't assume your competition has mapped problems as thoroughly—this can be your competitive edge.

Diving deep into problems

What problem are you helping your customer make progress with and why?

Question to ask

- How do you try to solve this problem now? (step by step)

- What works? What doesn't?

- What does progress look like?

- Archetypes: how do they generally behave as a customer? What can we expect them to do, and not do?

Signal to get

- Stories

- Workflows

- Unmet needs

- It is/isn'ts

Methods to use

- Qualitative interviews

- Problem mapping

- Secondary research

Interview example — sleep wind-down

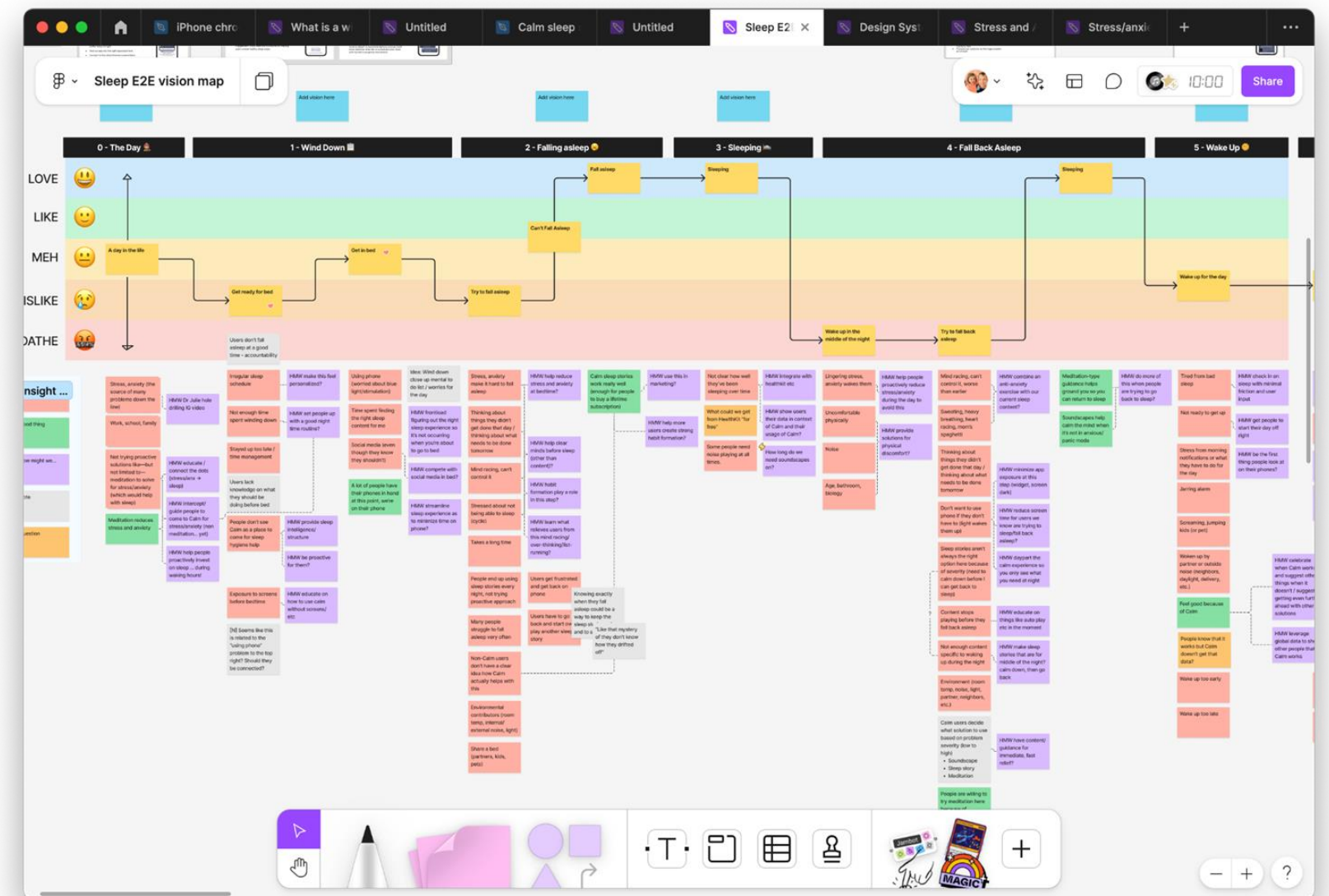Easily gain a deep understanding of the problem process using remote tests.
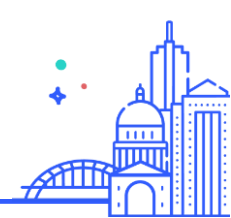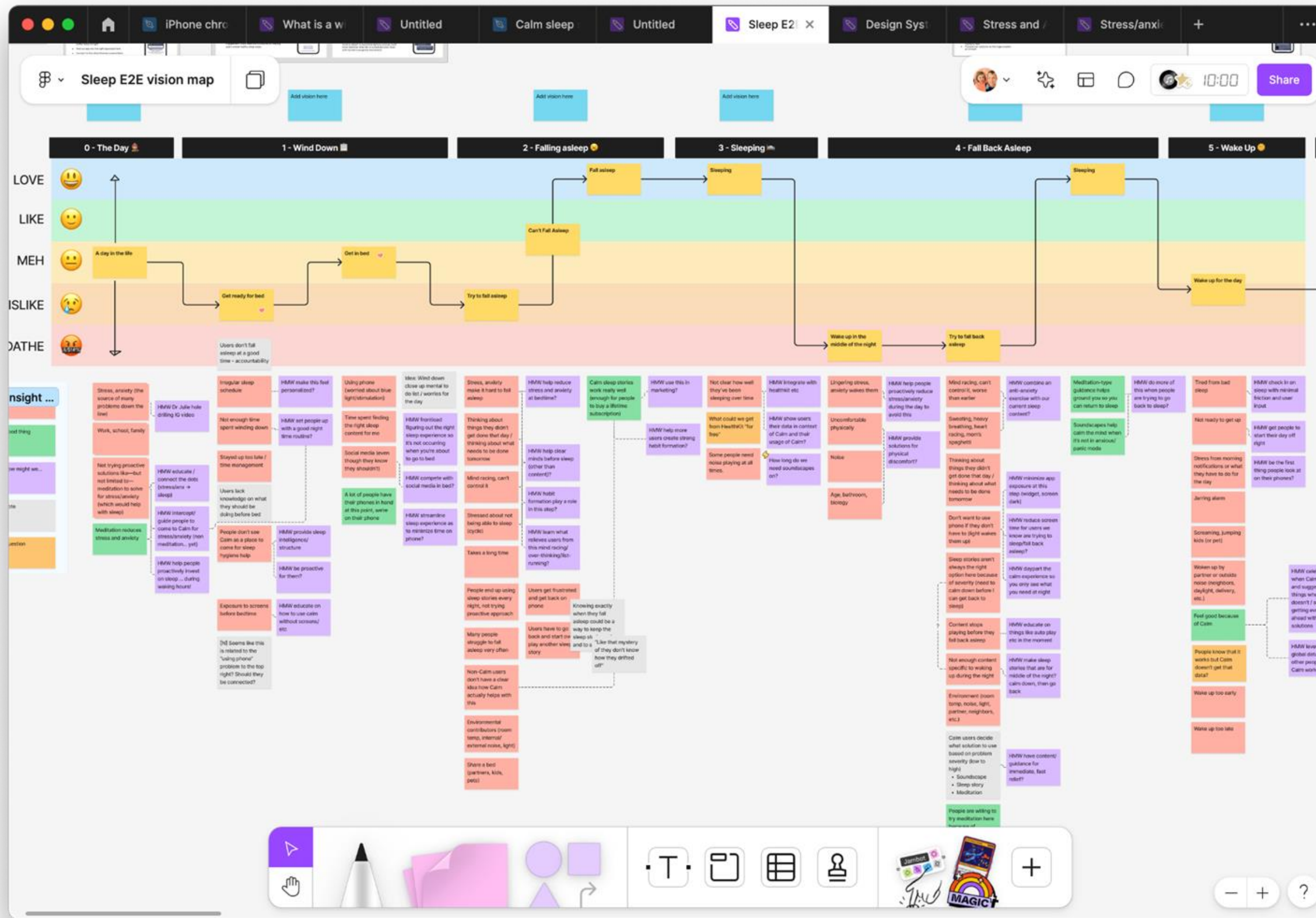
Problem maps — user journey's angry cousin

A problem map focuses on the customer's problem, similar to a user journey, but with a stronger emphasis on problem-solving.

Key elements of a problem map

- **Phases** of solving the problem (X axis)
- **Steps** involved (X axis)
- **Ease or difficulty** of each step (Y axis) – or funnel completion stats
- **Insights** for each step:
  - Problems
  - Wins
  - "How might we" (linked to pain points)
  - Notes
  - Questions

A template is linked later in this presentation.

Sleep E2E vision map

Share · 10:00

| 0 - The Day ☀️ | 1 - Wind Down 🛏️ | 2 - Falling asleep 😴 | 3 - Sleeping 💤 | 4 - Fall Back Asleep | 5 - Wake Up 😃 |

Add vision here

Rows: LOVE 😄 · LIKE 🙂 · MEH 😐 · DISLIKE 😢 · LOATHE 😣

- A day in the life
- Get ready for bed
- Get in bed
- Try to fall asleep
- Can't Fall Asleep
- Fall asleep
- Sleeping
- Wake up in the middle of the night
- Try to fall back asleep
- Sleeping
- Wake up for the day

Focusing on unmet needs for innovation

- Understand user struggles, goals, and context to drive engagement.

- Focus on unmet needs for true innovation, not just improvements.

- Use unmet needs to define design constraints for new concepts.

- Key insights come from reading "between the lines" in user interviews.

✓ **It is**	✗ **It isn't**
• Instant gratification • Easy, intuitive • Reassuring • "Obviously for me" • Accessible everywhere • Discrete • Guided	• Silent • Meditation • Intimidating • Proactive • Hard to find
✓ **It does**	✗ **It doesn't**
• Acknowledge the problem and commit to solving it together • Reduce stress and anxiety in the moment • Hold your hand through the process	• Make me feel alone • Leave me feeling more stress or anxious • End before I'm ready

Examples of what stress and anxiety customers did and did not want in a new solution.

Tip:

Unlike customer insights, which are memorized, a problem map is a living document—meant to be updated and referenced regularly.

Concept testing

Generating and testing concepts

Now that we understand our customers and their needs, we're ready to innovate with confidence.

**Goal:** Create and prototype a shortlist of ideas.

Concept testing involves two phases:

- **Phase 1: Ideation**
  - Generate a broad list of concepts based on customer and problem insights.

- **Phase 2: Prototyping**
  - Narrow down to a short list (or single concept) to test with users.

Tip:
You can test just one idea, but testing multiple concepts together reveals how they compete and benchmark against each other.
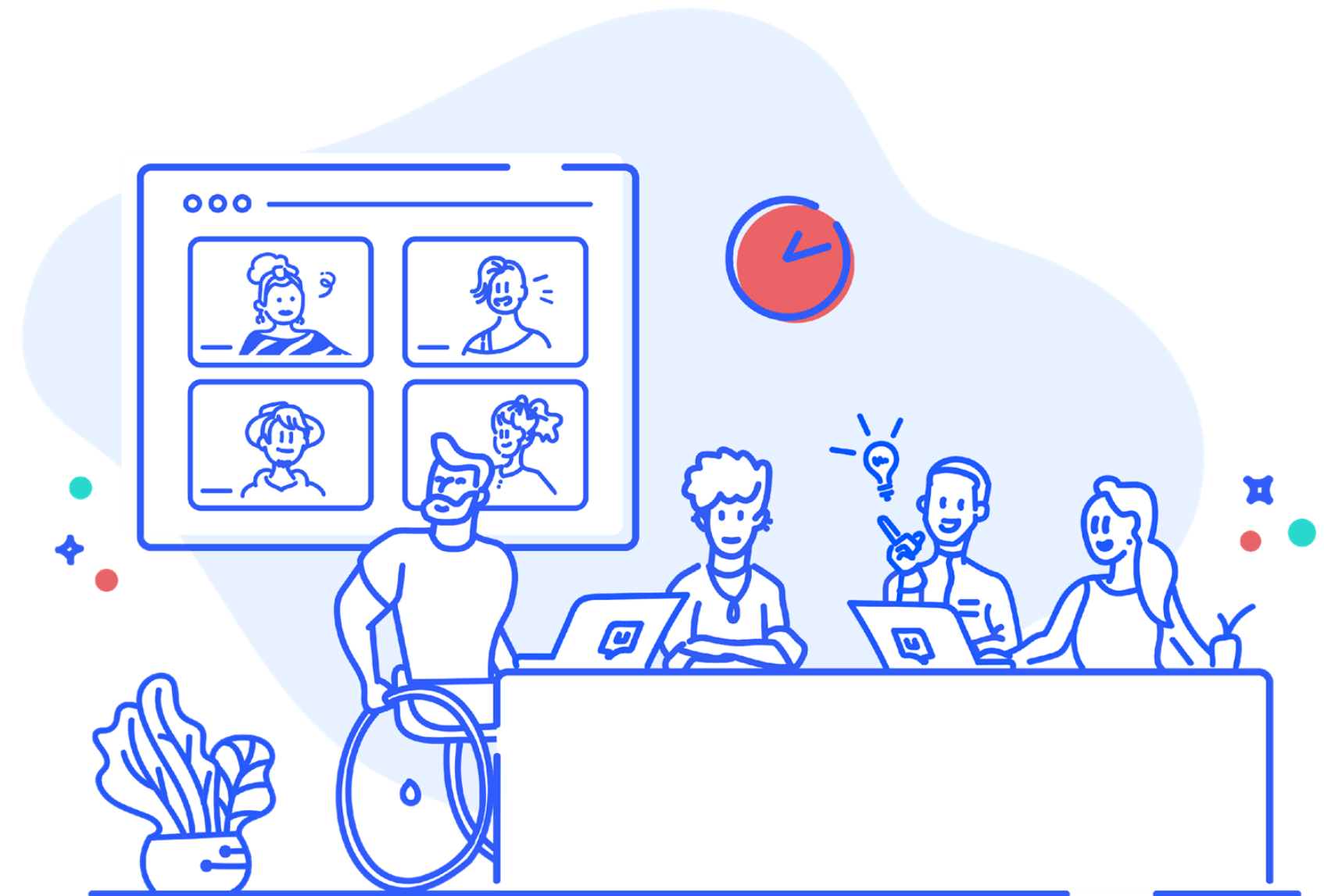
Concept testing

Will your new concept help them?

Question to ask

- Which concepts should we pursue?
- Do they understand what the new concept is?
- Does the new concept solve their problem? (perceived and actual)
- How willing are they to try it?
- How willing are they to pay for it?

Signal to get

- Comprehension
- Want
- Buy-in
- Efficacy

Methods to use

- Card sorting
- Force ranking
- Prototype testing
- Customer co-design
- General sneaky business

Concept testing

Exploring broad concepts and narrowing down to a shortlist for customer testing

Brainstorm

- Use customer archetypes, problems, problem maps, and unmet needs as constraints and inspiration for brainstorming.
- Leverage insights from the customer and problem phases to keep ideas focused.

Short list

- Have the internal team vote on the most interesting ideas.
- More importantly, let potential customers "vote" on what interests them. (Sneaky methods in next case study!)
- Focus on capturing two signals:
  - Do they understand the concepts?
  - Do they want them?

Prototype

- Build prototypes for your top ideas in a format that works for your team.
- Test each remotely using the same discussion guide.
- Evaluate each concept by answering key questions:
  - Do they understand the concept?
  - Does it solve their problem?
  - How willing are they to try it?
  - How willing are they to pay for it?

💡 Tip:

Don't be surprised if multiple concepts succeed—they're all grounded in actionable customer insights!
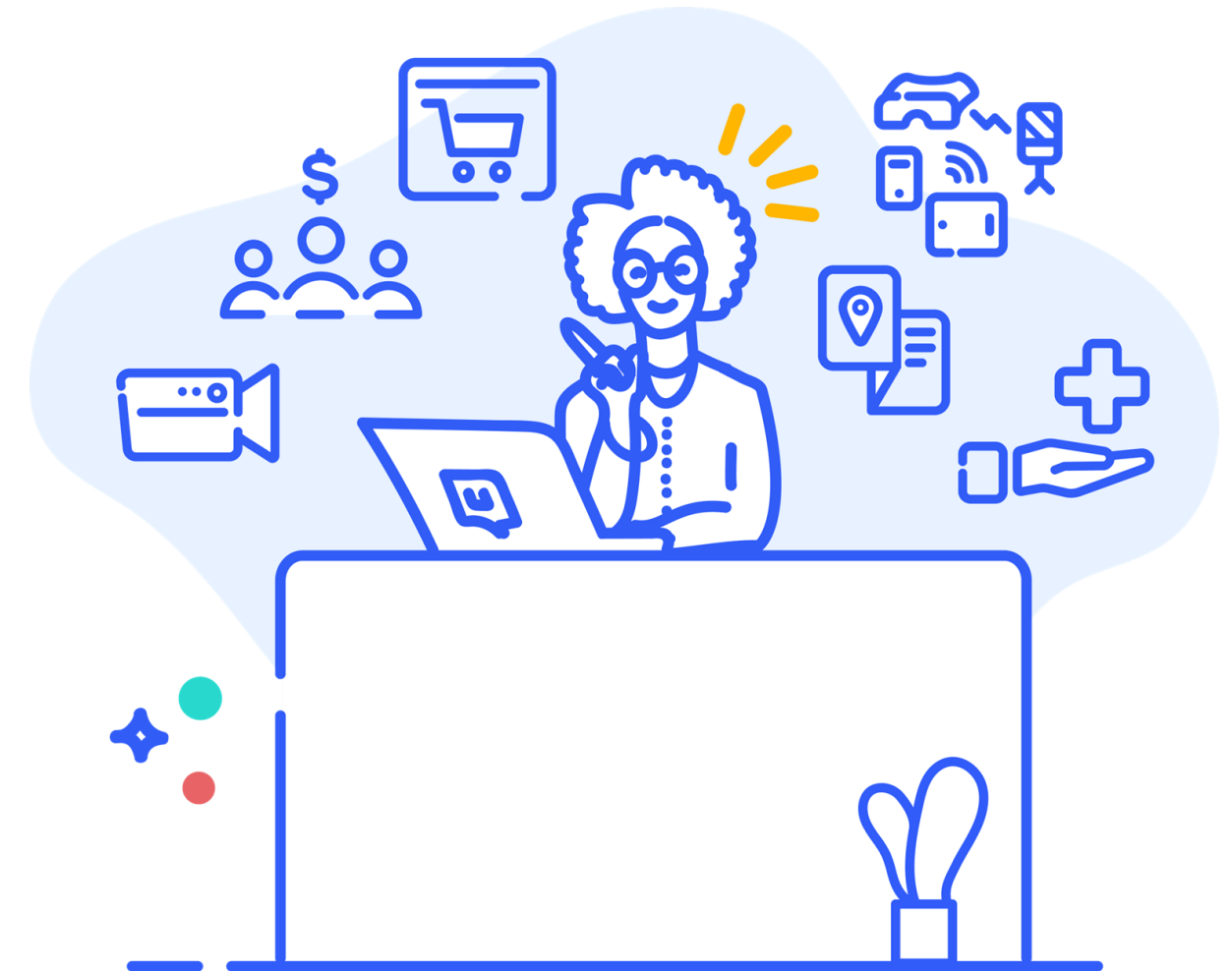
Testing features

Refining your concept for usability testing

- **Goal:** Refine a concept you're confident in.

- Once you have enough signals to invest, focus on fleshing out the specific features through usability testing.

- **Reminder:** Don't jump straight to features—work through customer, problem, and concept phases first.

- At this point, focus strictly on usability, using tools like UserTesting to validate your work.

Testing features

How well do the features work?

Question to ask

- Do they understand how it works?
- Can they use it?
- Do they love it?

Signal to get

- Task analysis
- Sentiment

## Methods to use

- Usability testing
- Usage data
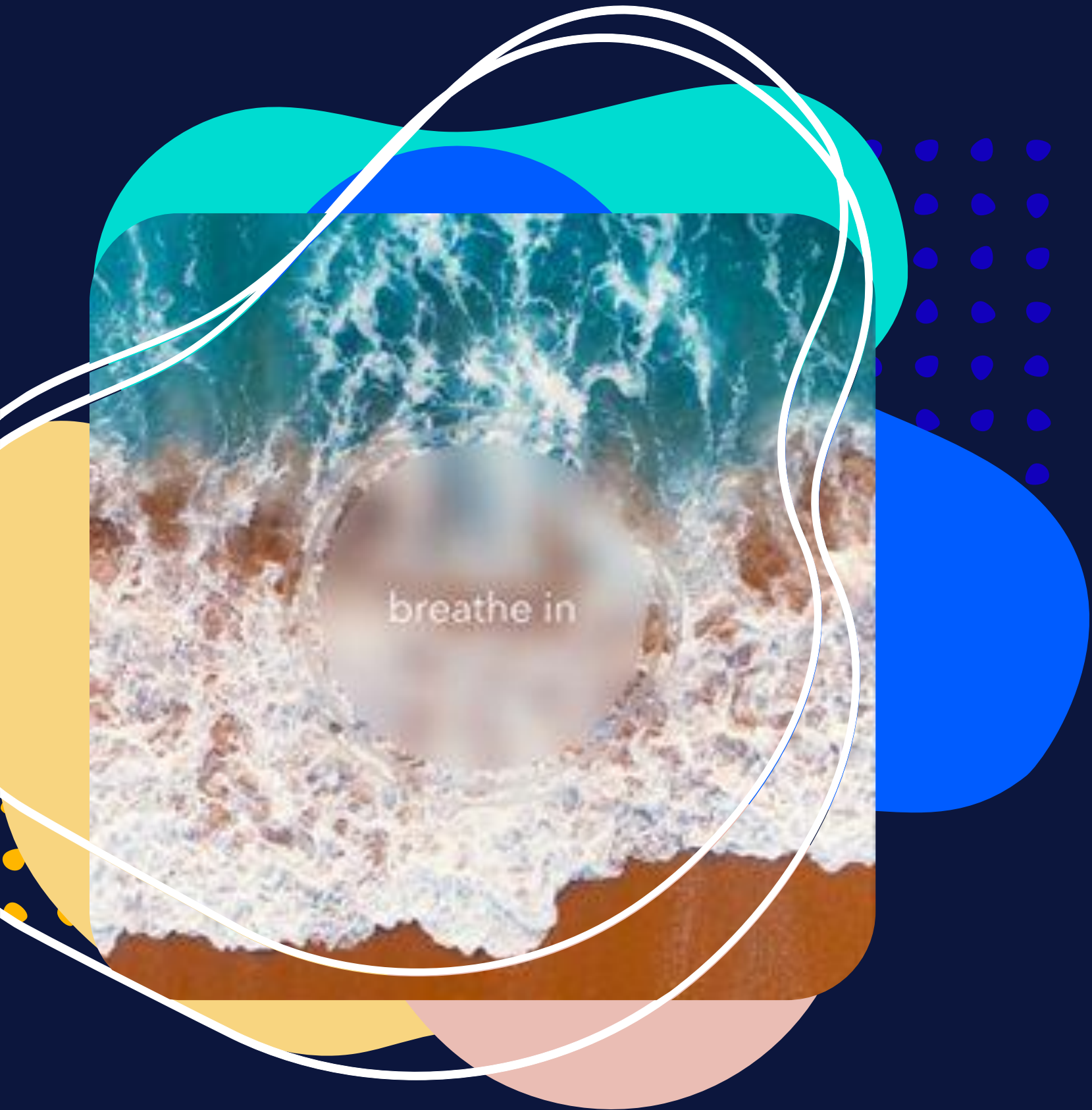
Calm case study: tackling stress and anxiety

From one major challenge to four user-validated solutions in just four months

breathe in

Understanding our stress and anxiety users

A large cohort with unmet needs

- A large group came to Calm for immediate stress/anxiety relief.

- These users fit the **reactive archetype** with unmet needs.

- There was a significant gap between their satisfaction and desire for relief.

- Rather than just surface meditations, we dug deeper to understand:
  What do users want to achieve in the moment?

- This goal differed from long-term meditation needs.

35 (35.0%)

65 (65.0%)

● Team 1 ● Team 2
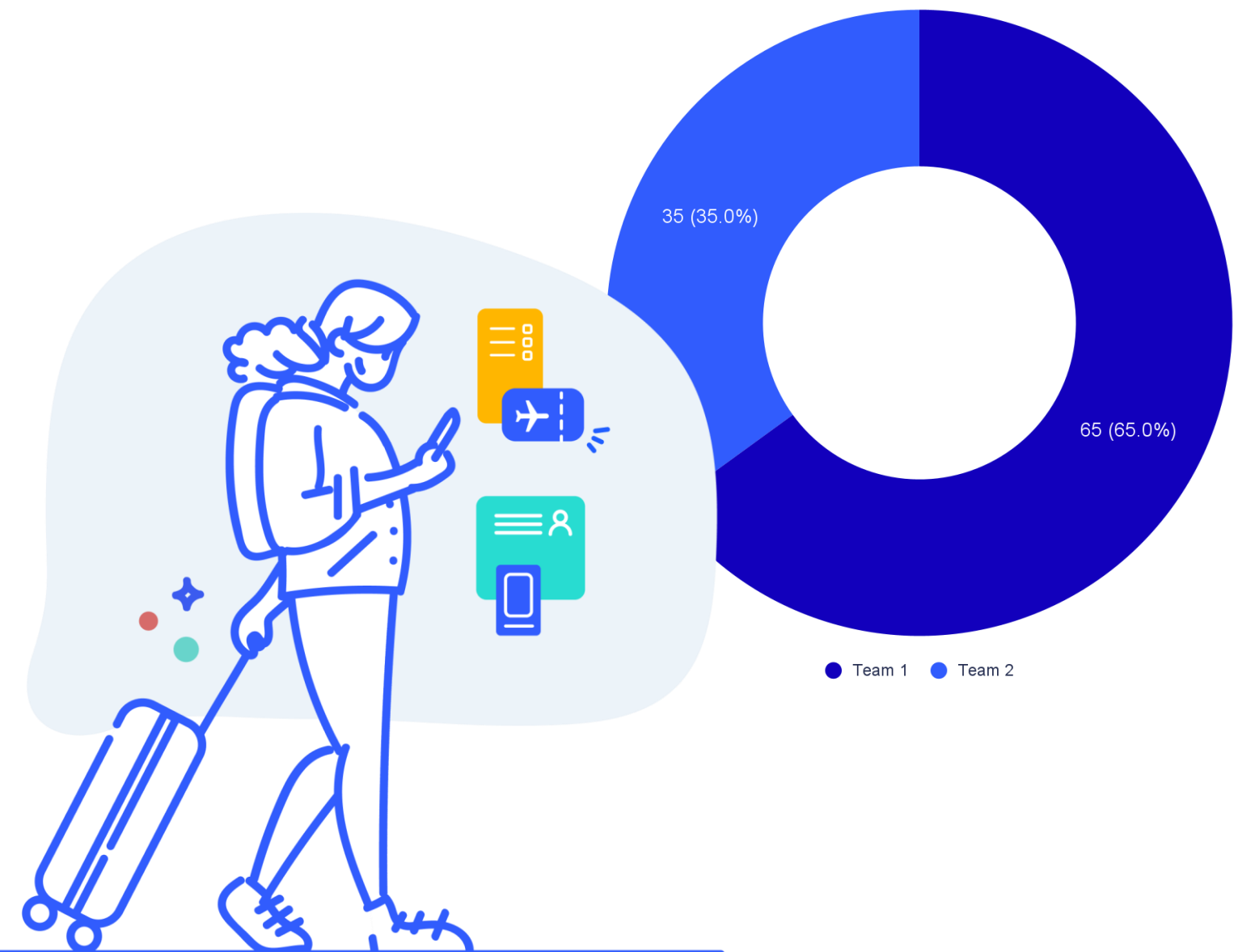
Problem: reducing stress and anxiety in the moment

- Conducted user interviews (remote unmoderated and moderated) to explore how people manage stress/anxiety in real-time.

- Discovered unmet needs, which informed our design constraints and problem map.

- Secondary research revealed that people in acute stress benefit more from **exteroceptive** rather than **interoceptive** mindfulness techniques.

- We uncovered much more, but we'll focus on the key insights here.
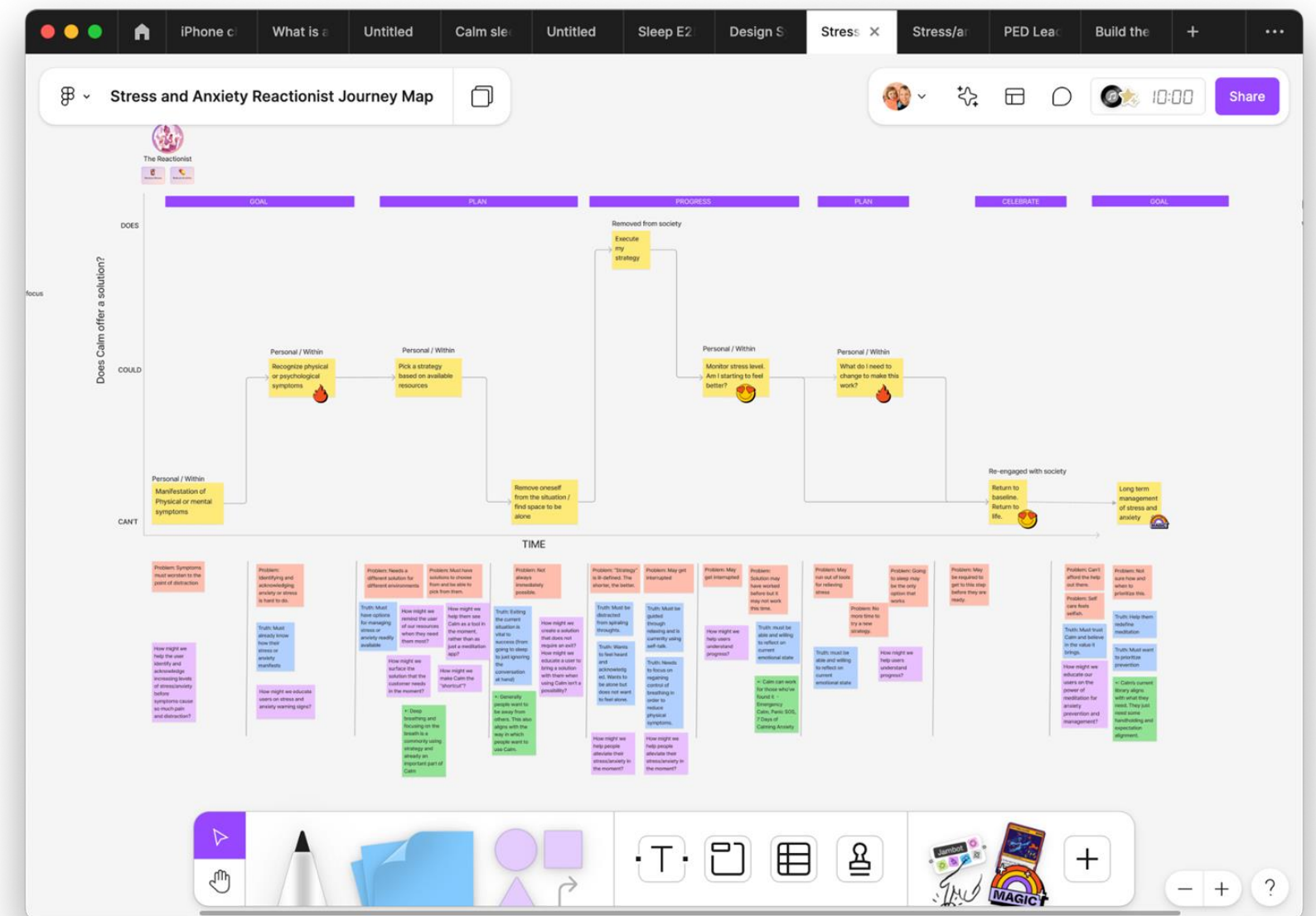
Concepts: insight-driven design constraints

How we determined which concepts to move into prototype testing

Cross-functional brainstorm:

- Generated ideas using design constraints from earlier phases.
- Top-voted concepts moved into user-facing concept tests.

"Fake app" IA test (Anxli):

- Asked participants to help structure our anti-stress and anxiety app by sorting concepts (from previous phase) into categories like Home, Discover, Profile, and More.

Key signals we measured:

- Does the concept solve their problem?
- How willing are they to try it?
- Would they pay for it?

Breathing Experiences
Breath your stress and anxiety away with these guided exercises (includes sound and video)

Guided Relaxation Sessions
Have an instructor guide you through proven relaxation techniques

Grounding sessions
Tame your anxiety with simple to follow grounding techniques

Photo Gratitude Journal
Use photos to reflect on what you're grateful for.

Body Scan
Have an instructor guide you through how to relax each part of your body, removing any negative feelings.

Progressive Muscle Relaxation
Slowly relax your entire body with instructions

Education
Read about stress and anxiety causes, and the science behind it.

Nature Escapes
Escape your situation into healing nature visuals with calming music

Concepts: prioritizing prototype efforts based on user feedback

User-driven app design

- Participants built a fake app to prioritize features

- Focus: What should be on the Home screen? Most app usage centers around it, while features buried in "Discover" or "More" pages reduce engagement and subscriptions.

Key insights

- Which three features are essential?

- Which three features can we lose?

- What should the app cost?
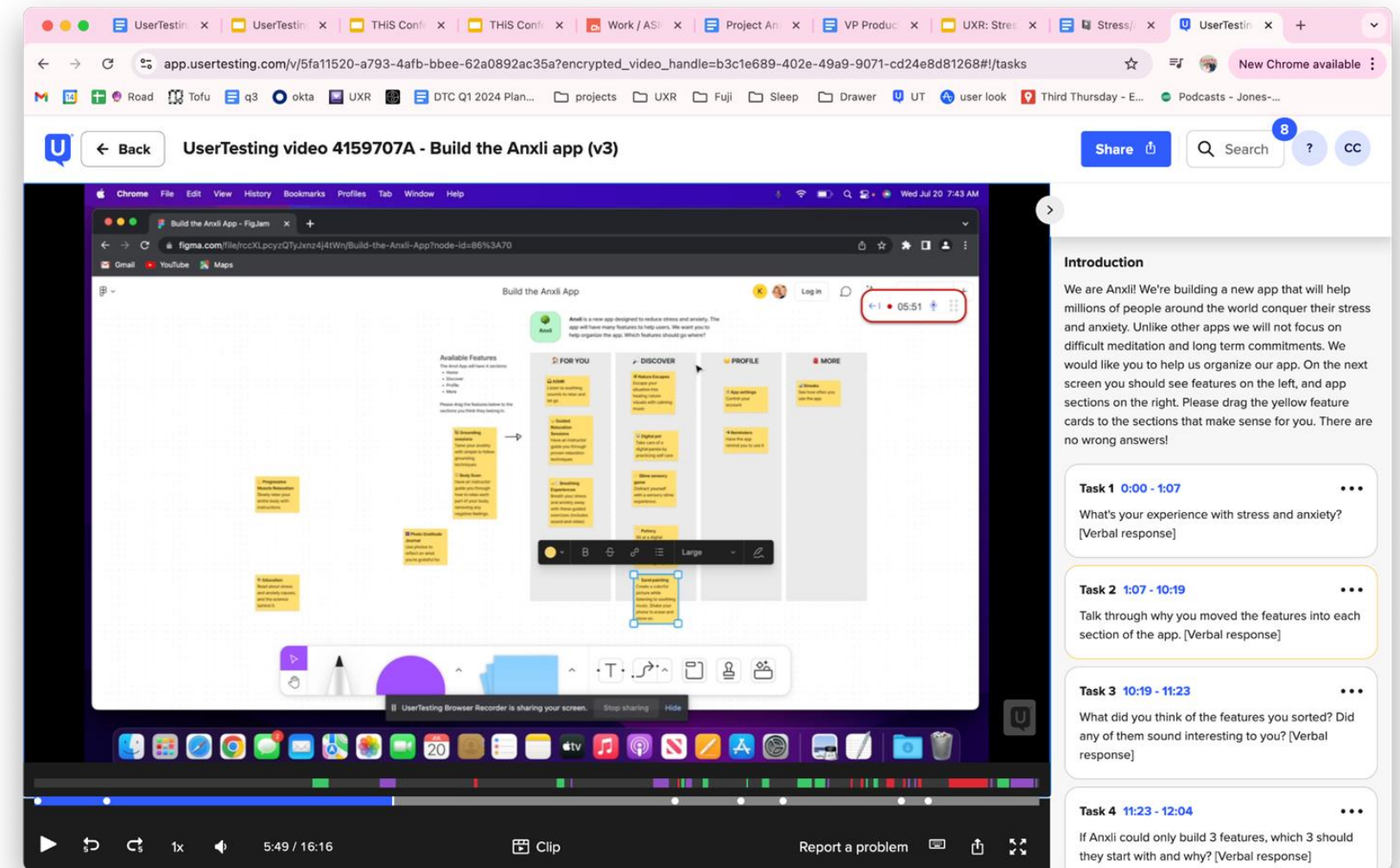
Prototyped and tested four concepts

Each of these concepts were alternative ways to combat stress and anxiety

Immersive breathing
YouTube

Guided breathwork helps users manage stress and anxiety with a calming ocean scene, supportive narration, and an animated breath bubble for easy follow-along.

Escapes
YouTube

The Escape prototype is a five-minute audio/video experience that guides users through a forest escape with breathwork, nature observation, and a stress-reducing thought exercise.
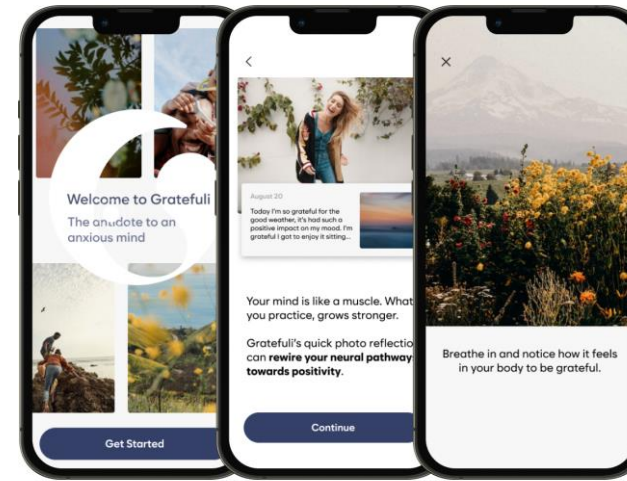
Photo gratitude journal
Figma

The Grateful prototype was an app that allowed users to create gratitude posts using their photos and share them with friends and family.
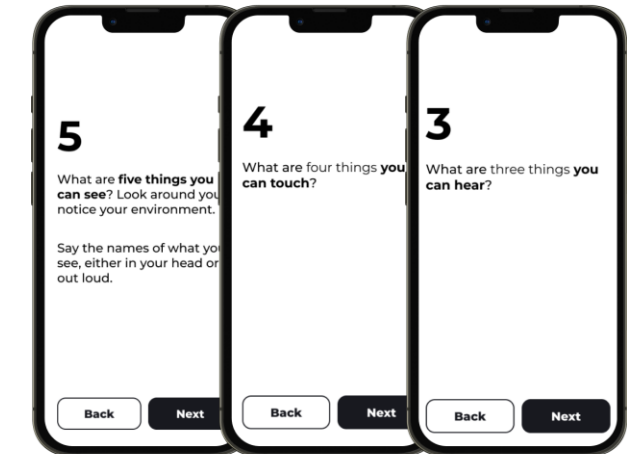
Text-based anti-stress/anxiety
Figma

This prototype offers simple, step-by-step text instructions to guide users through stress and anxiety-reducing activities.

Prototype testing: early user feedback

We asked the same set of questions for each prototype to see which concepts users liked and found effective, helping us prioritize before investing in engineering:

- Relationship with stress/anxiety?

- Do you use apps for stress? Why/why not?

- Stress level (1-5) before and after the prototype

- Confidence in the solution?

- Likelihood of using this technique in 7 days? Why/why not?

- Suggested changes?

- Optional: Request beta access with email
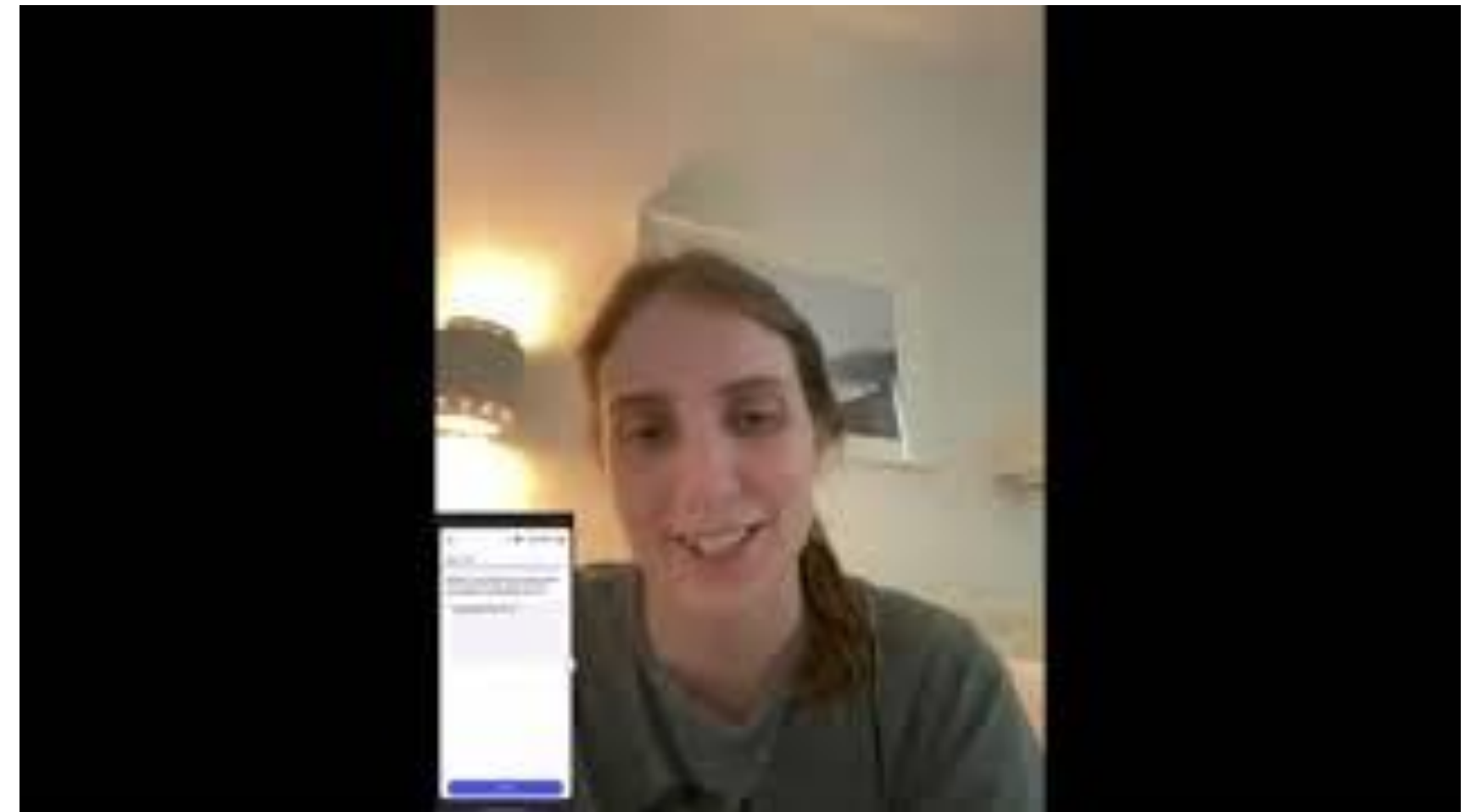
Unexpected results: simple prototype wins
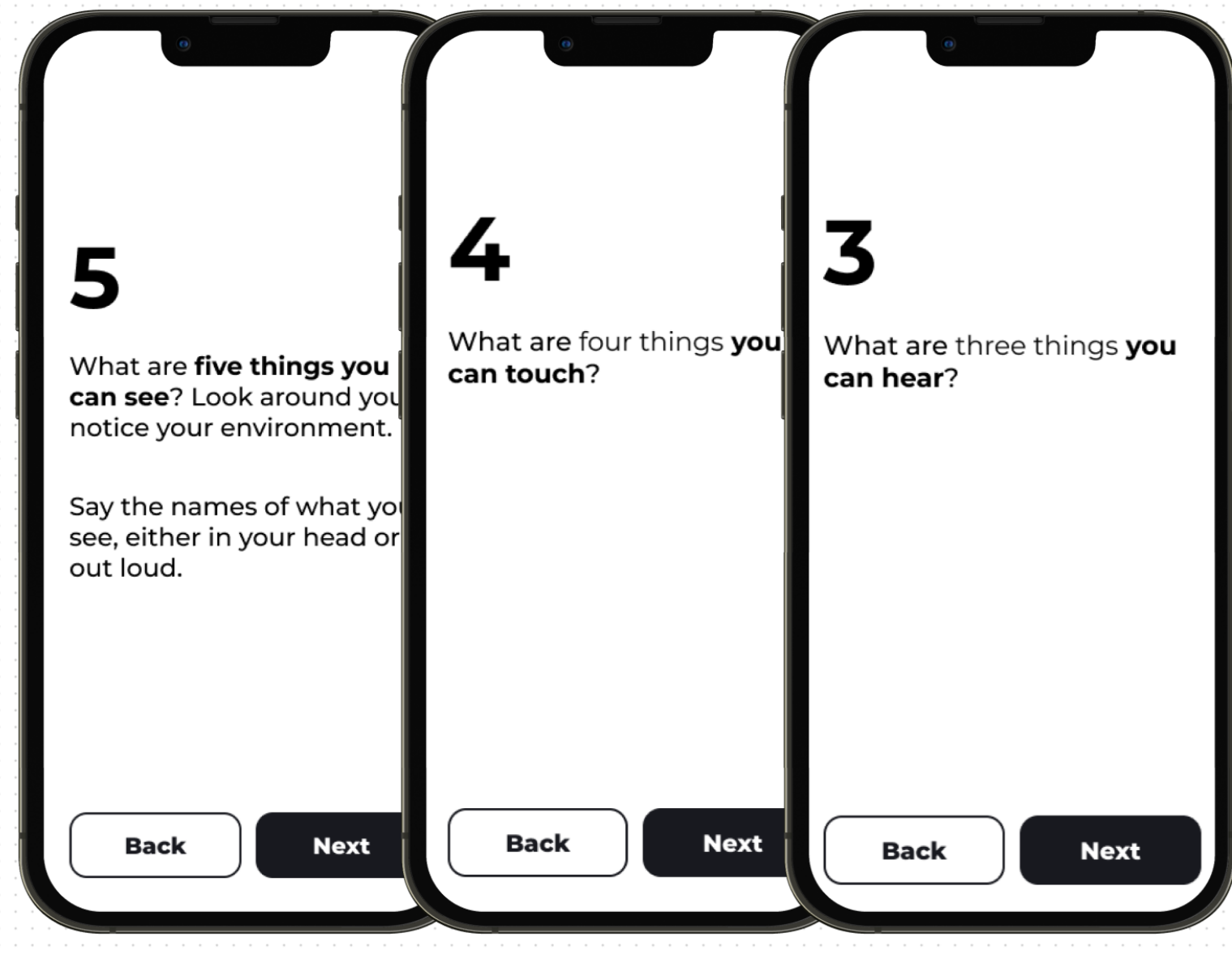
Our "Taptivities" prototype

Our simplest prototype concept proved to be the most effective and got the best signal for buy-in:

- Highest positive change in stress/anxiety score
- Highest "beta email opt-in" (70% average)

Positive signals from our learnings in the concept phase:

- Which concepts should we pursue? **Taptivities**
- Do they understand what the new concept is? **Yes**
- Does the new concept solve their problem? **Yes**
- How willing are they to try it? **Yes**

Feature: Taptivities are live in the Calm app

Calm's first new feature type in years

- Users valued a quick, easy, guided solution for stress and anxiety relief.

- Success led to expanding the concept into gratitude activities, thought exercises, and a potential non-audio version of Sleep Stories.

- The scalable, text-based format allows for rapid iteration and adaptation.

- After A/B testing, "Taptivities" was rolled out to all users.

- The team is now prioritizing non-audio mindfulness solutions based on user feedback.
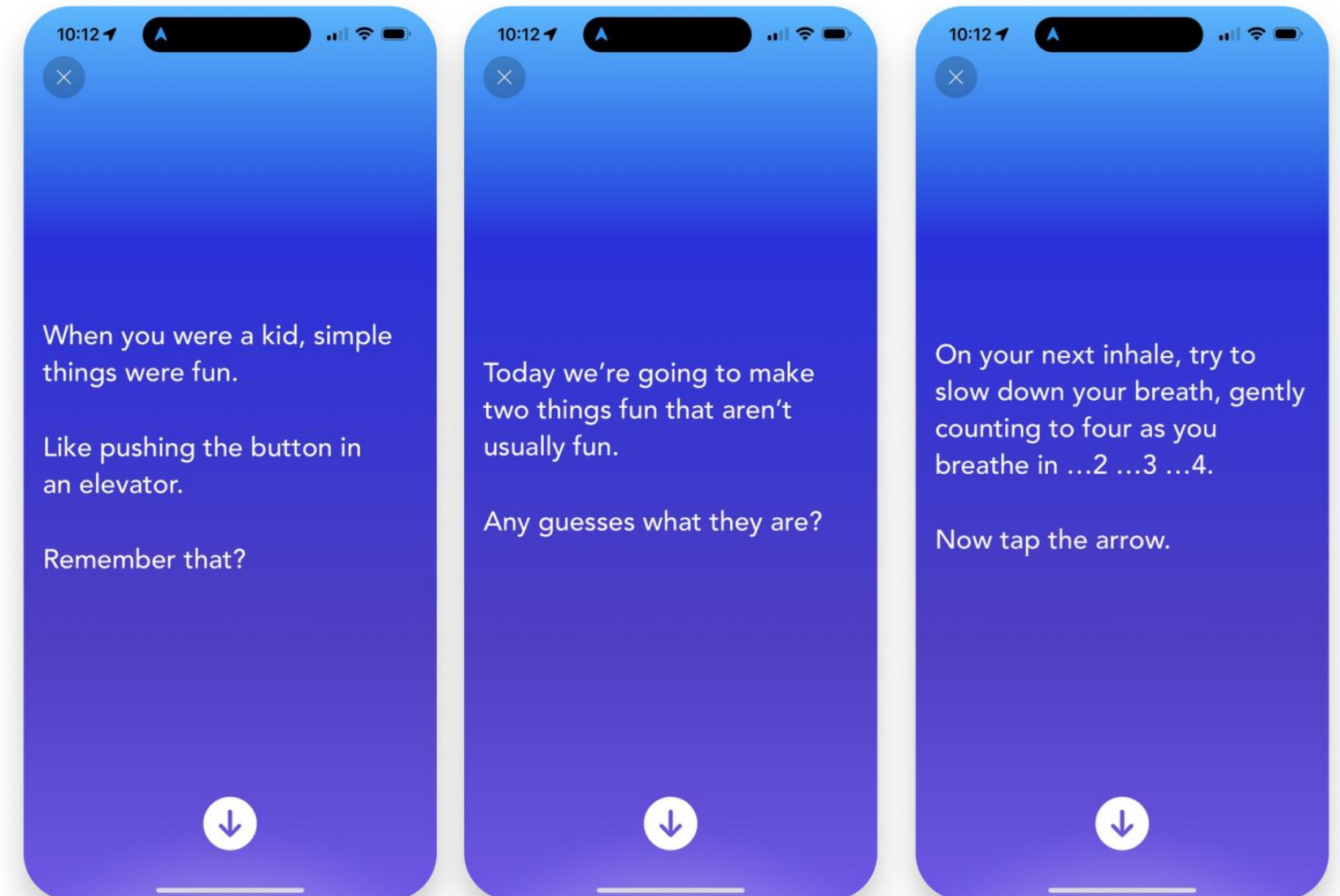
Our new concept was based on insights

Knowing who our customers are, what they needed, and what wasn't working led us to an innovative solution.
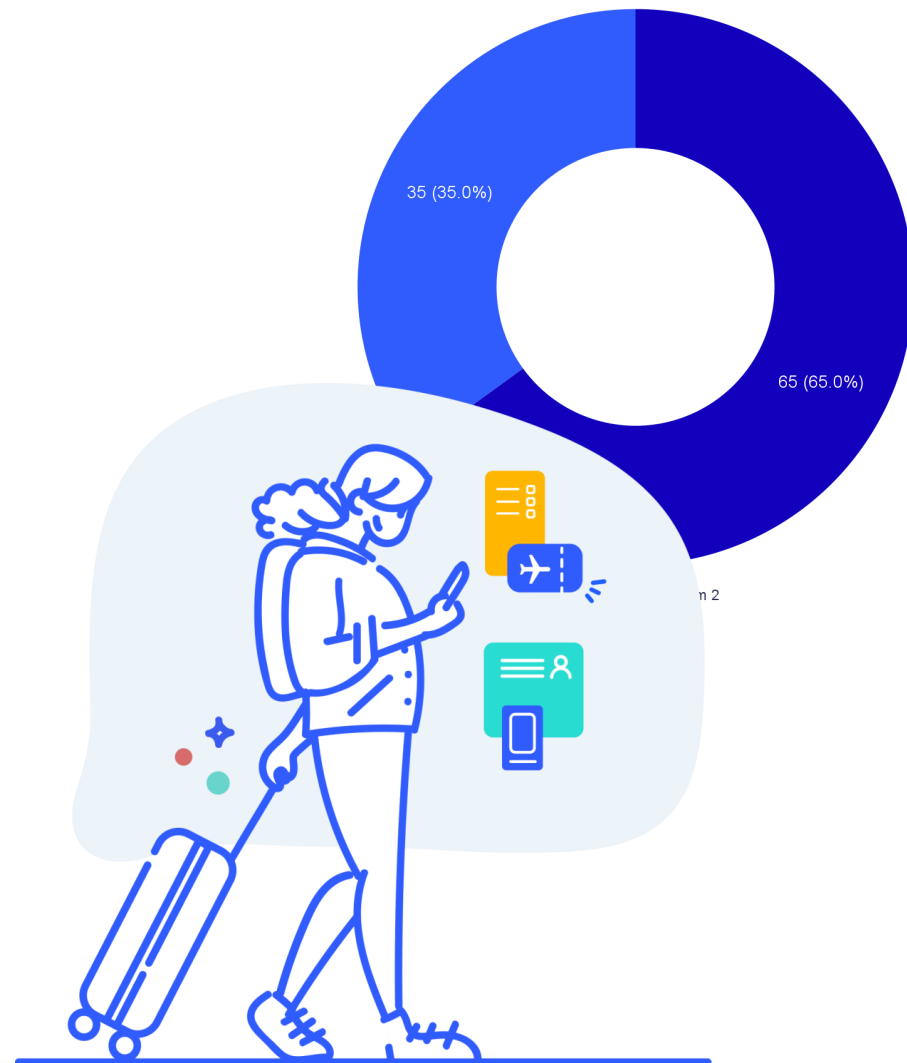
35 (35.0%)

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✅ **It is**	❌ **It isn't**
• Instant gratification • Easy, intuitive • Reassuring • "Obviously for me" • Accessible everywhere • Discrete • Guided	• Silent • Meditation • Intimidating • Proactive • Hard to find
✅ **It does**	❌ **It doesn't**
• Acknowledge the problem and commit to solving it together • Reduce stress and anxiety in the moment • Holds your hand through the process	• Make me feel alone • Leave me feeling more stress or anxious • End before I'm ready

When you were a kid, simple things were fun.

Like pushing the button in an elevator.

Remember that?

Today we're going to make two things fun that aren't usually fun.

Any guesses what they are?

On your next inhale, try to slow down your breath, gently counting to four as you breathe in ...2 ...3 ...4.

Now tap the arrow.
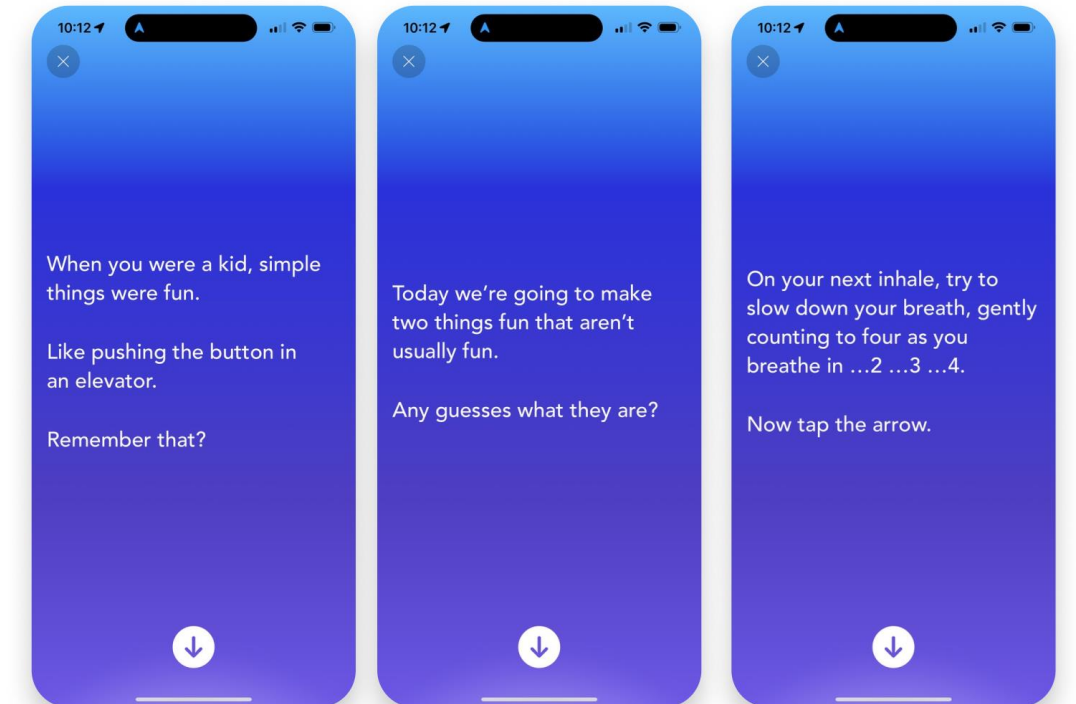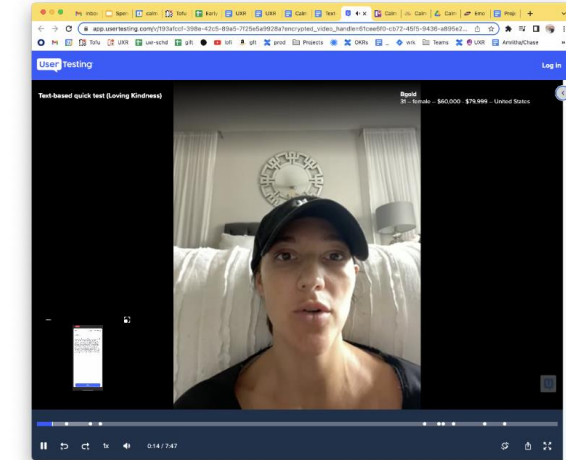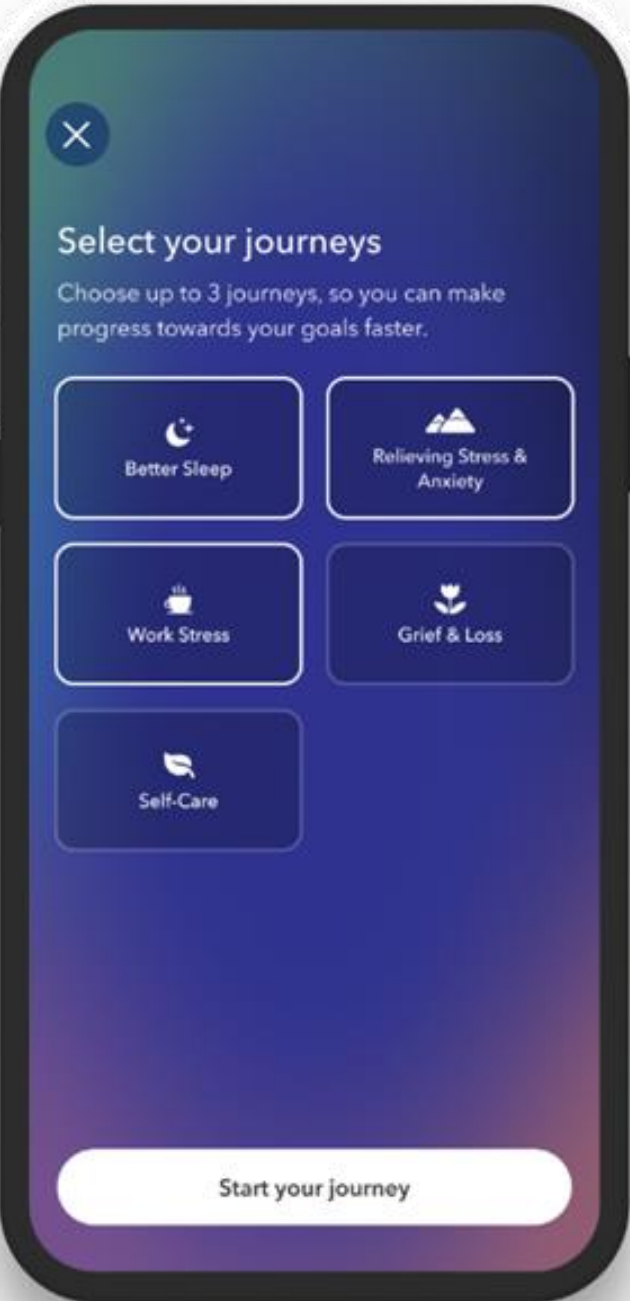
Innovation fuels innovation

After launching our "Taptivities" we've been developing a suite of non-audio mindfulness solutions geared towards customers who are looking for more "in the moment" relief and results.
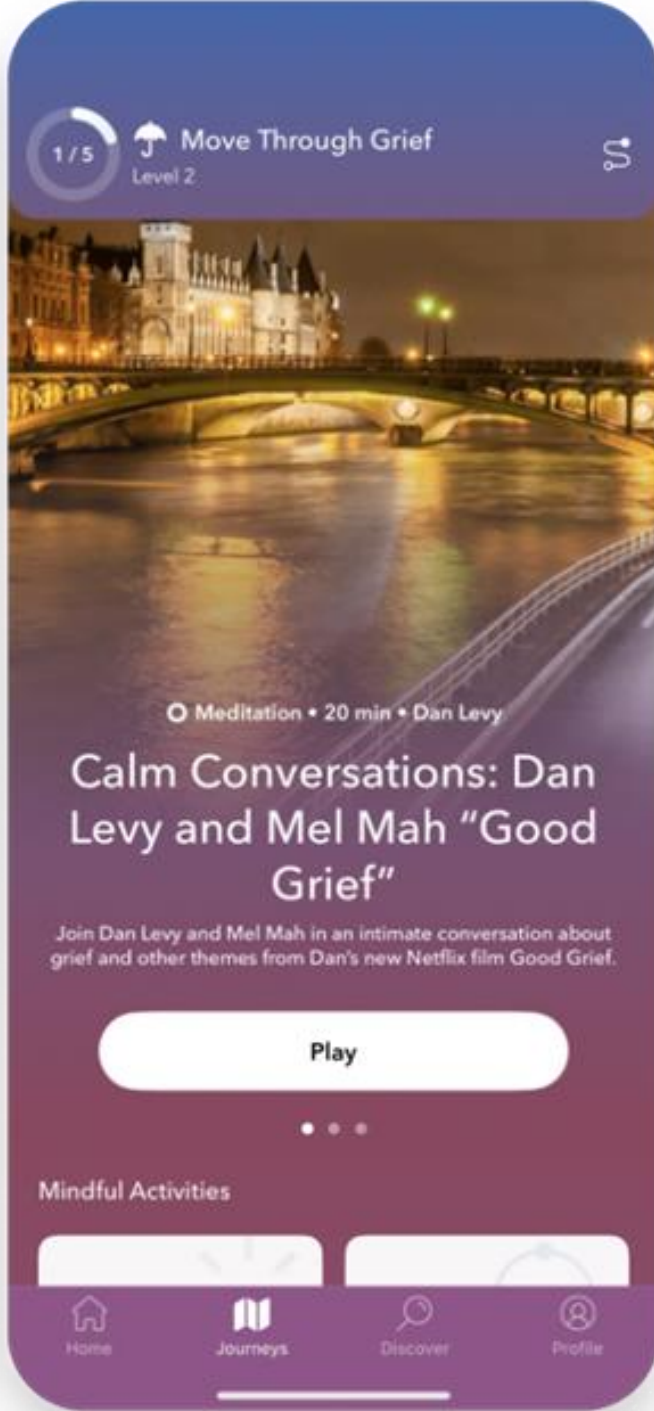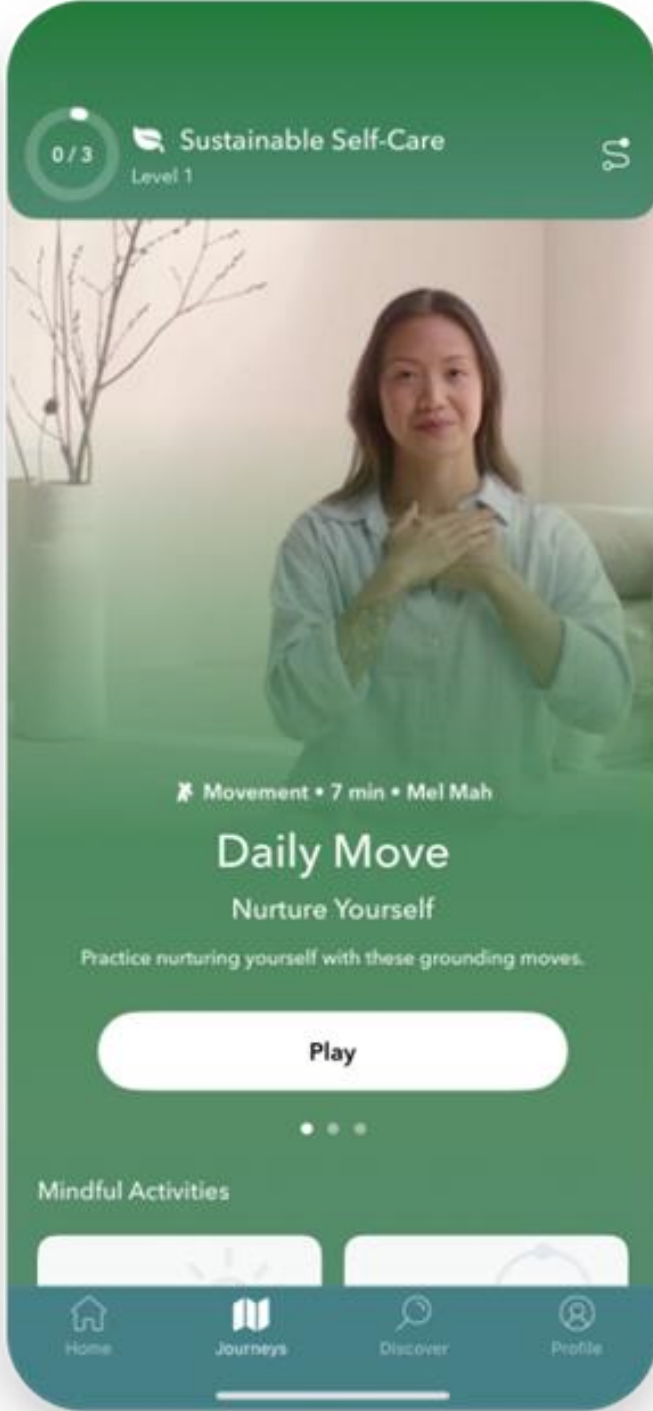
We've been busy.
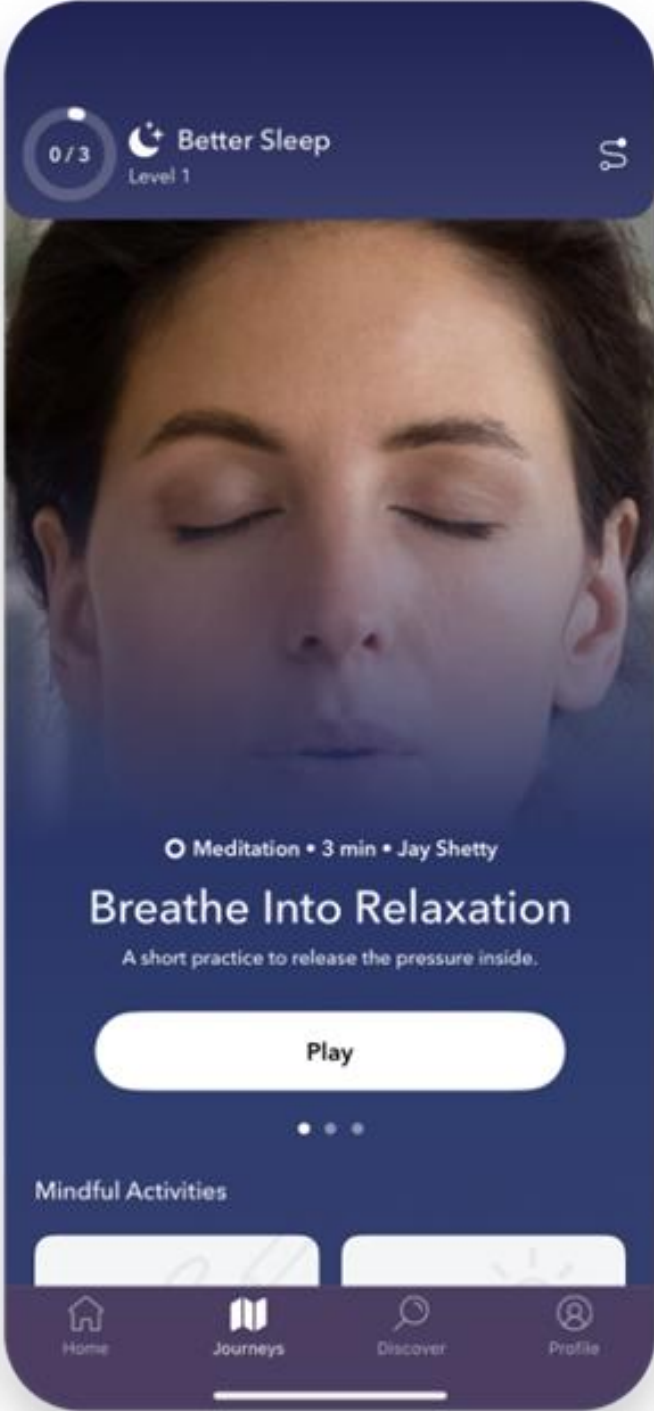
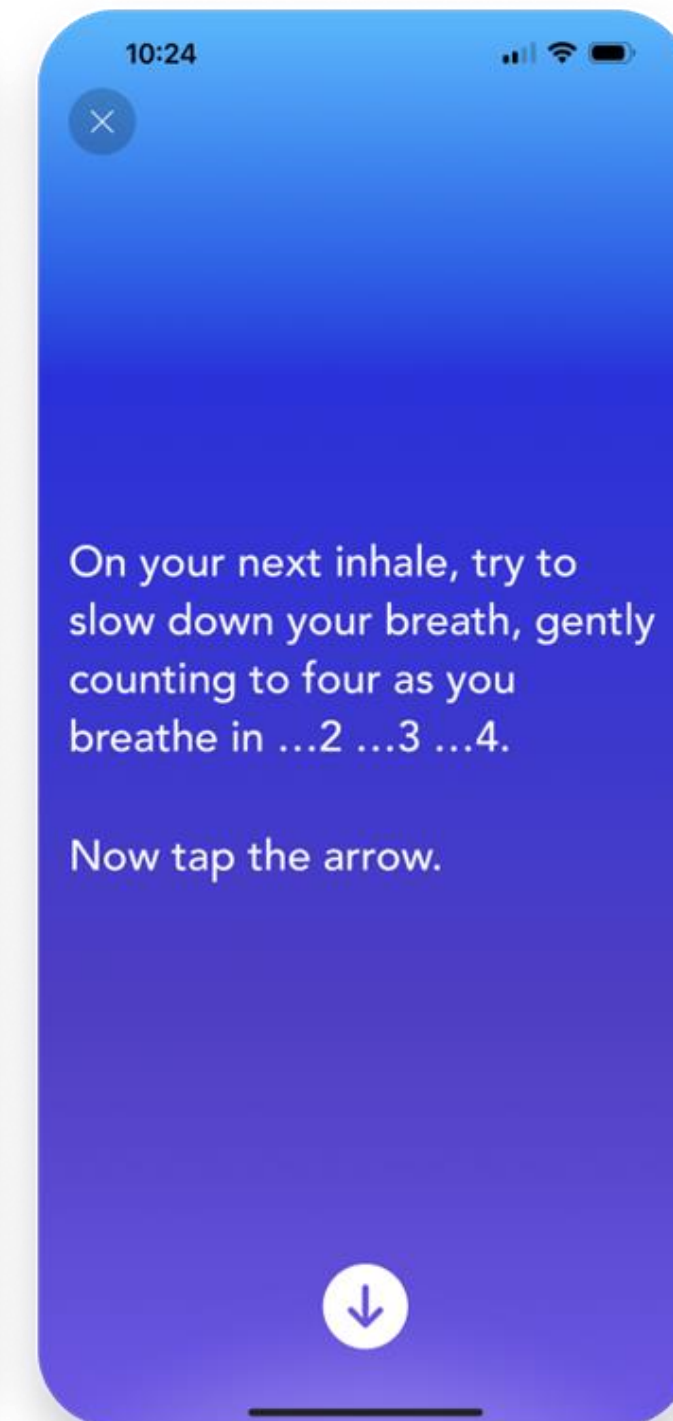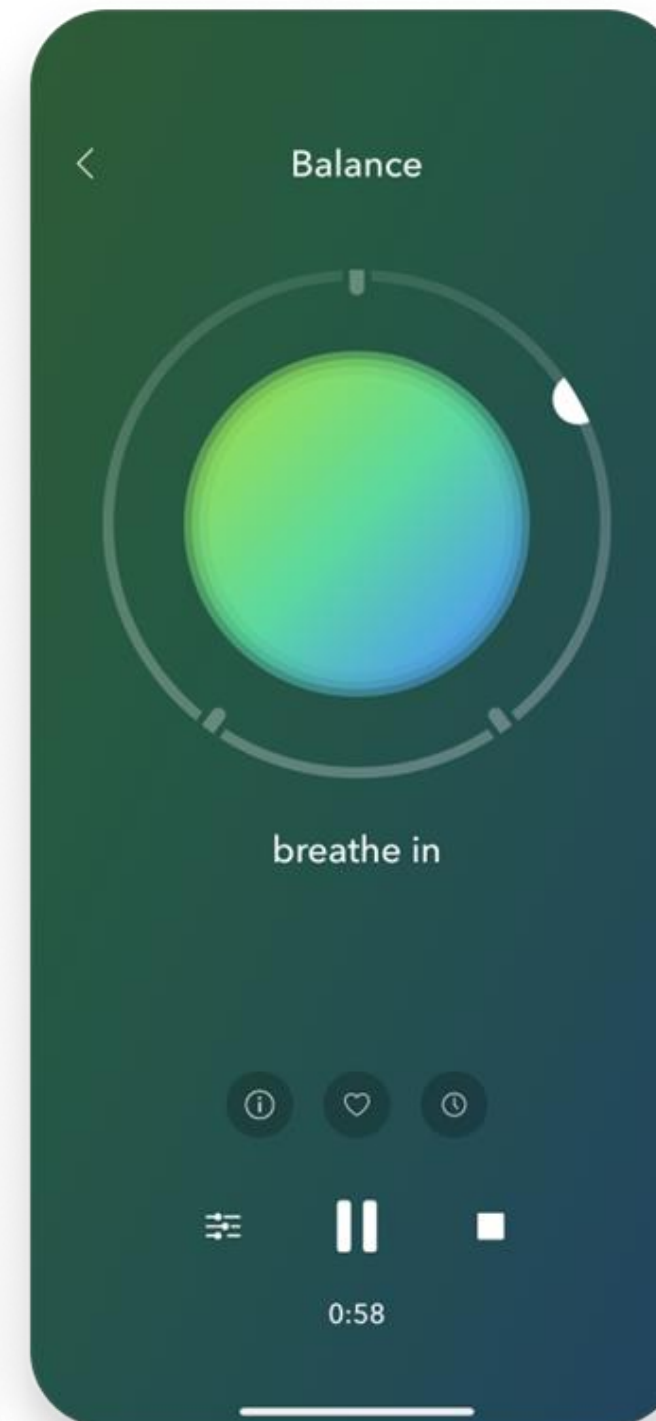# Introducing Journeys
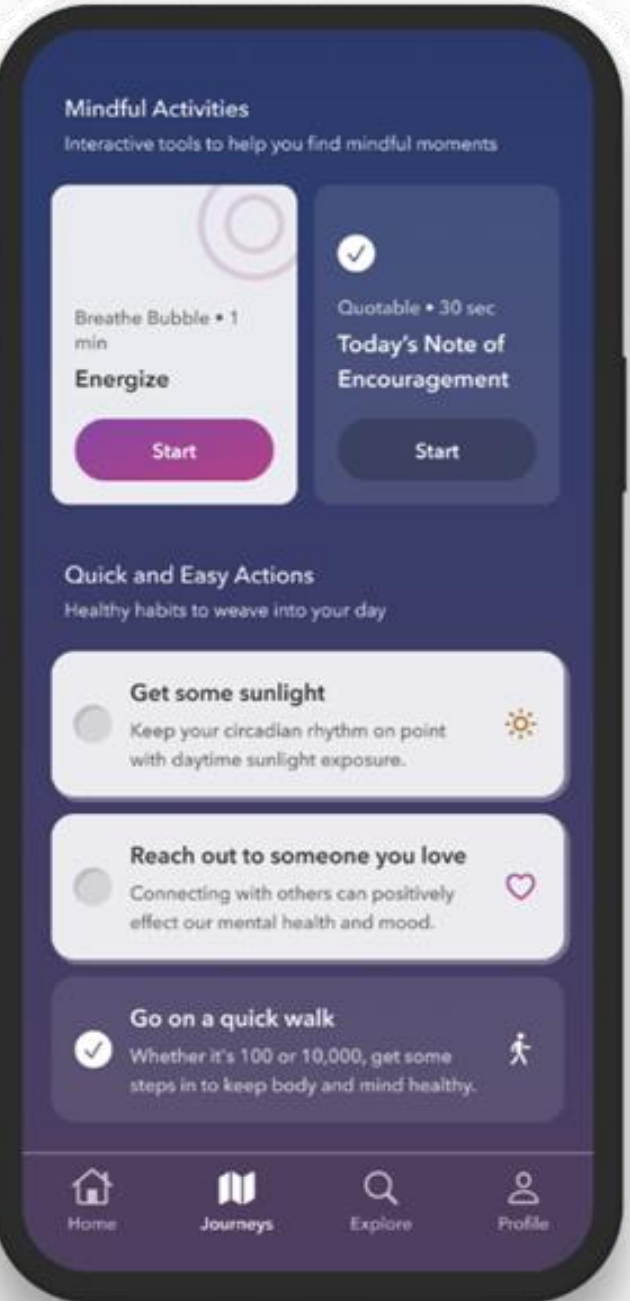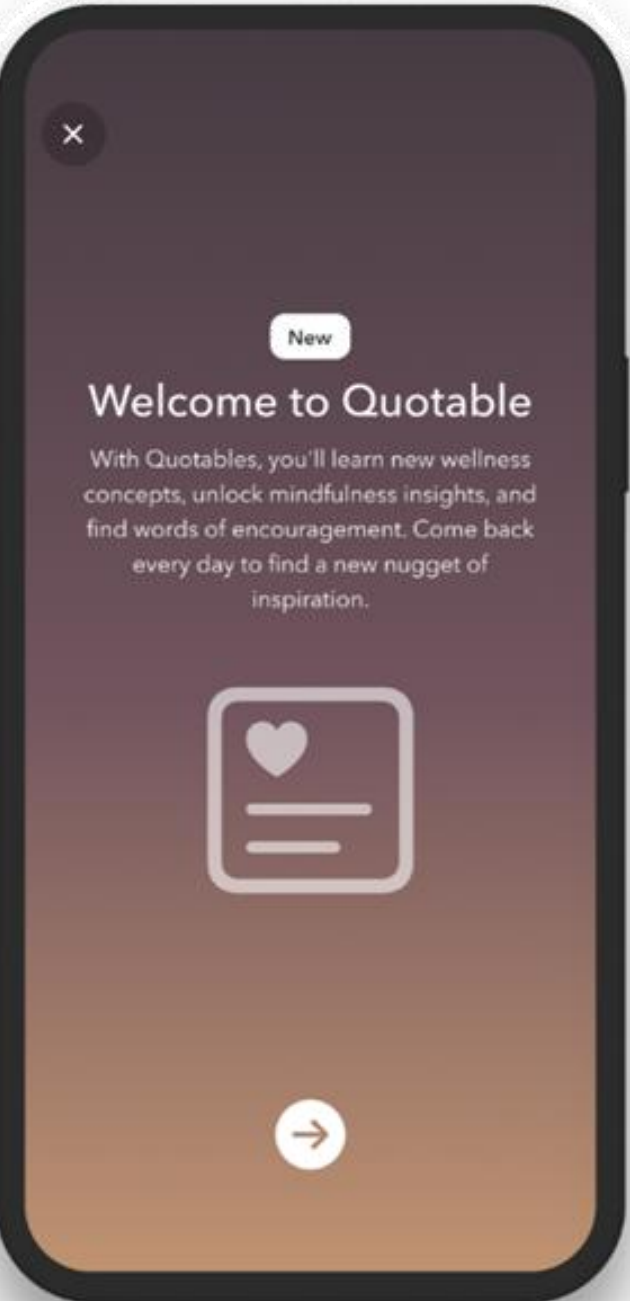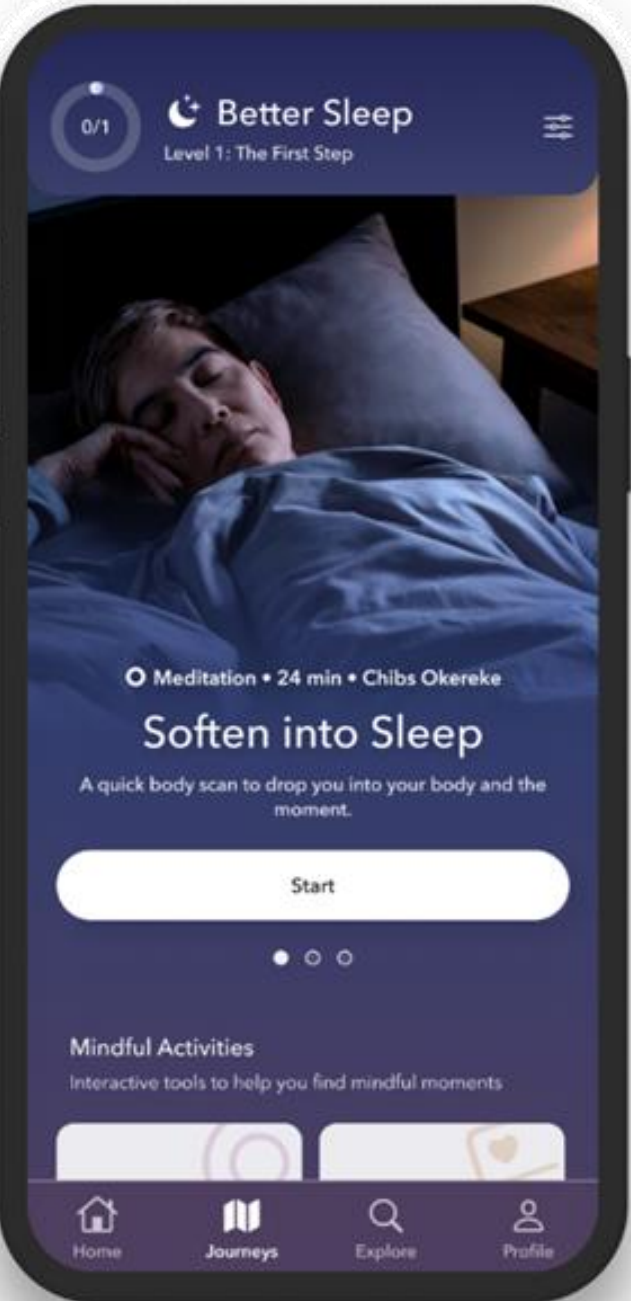
We're reinventing how users interact with Calm

Introducing Journeys

We're reinventing how users interact with Calm

Introducing Journeys

We're reinventing how users interact with Calm

Key takeaways

Each phrase has distinct objectives and outcomes and feeds into the next.

Understanding customers

Talk to your customers and build user archetypes and personas based on real insights. Make sure these are easy to remember and part of your team's everyday conversation.

Diving deep into problems

Create a detailed, evolving problem map that highlights key pain points. Regularly reference it and get stakeholder buy-in on the most critical issues.

Concept testing

Don't be surprised if multiple concepts work well—you based them on actionable customer insights! Work with stakeholders to align on business impact and feasibility of chosen concepts.

Testing features

Focus on usability and refining your concept into clear, actionable flows. This ensures efficient iteration on solutions you're confident in.

Thank you!
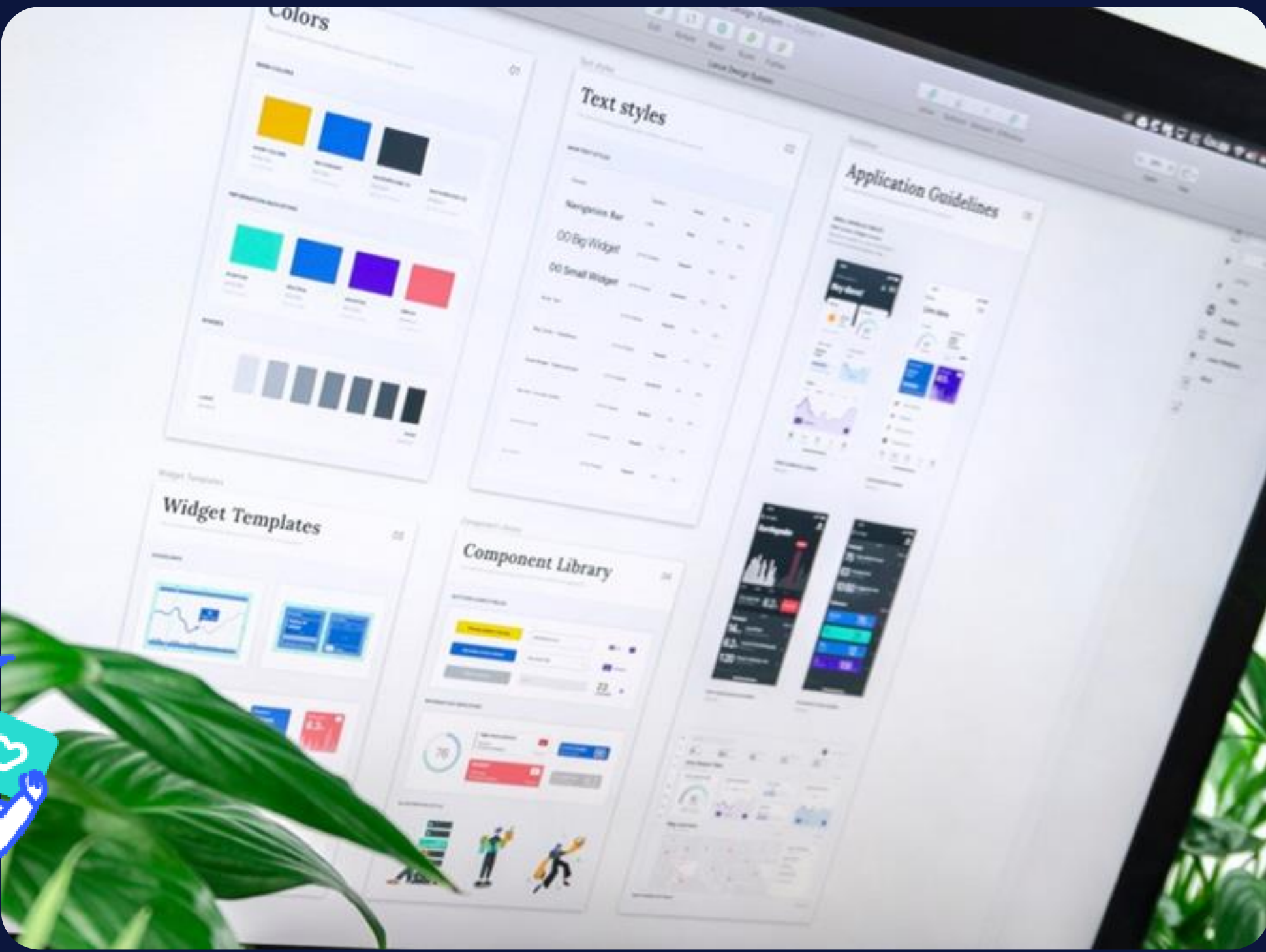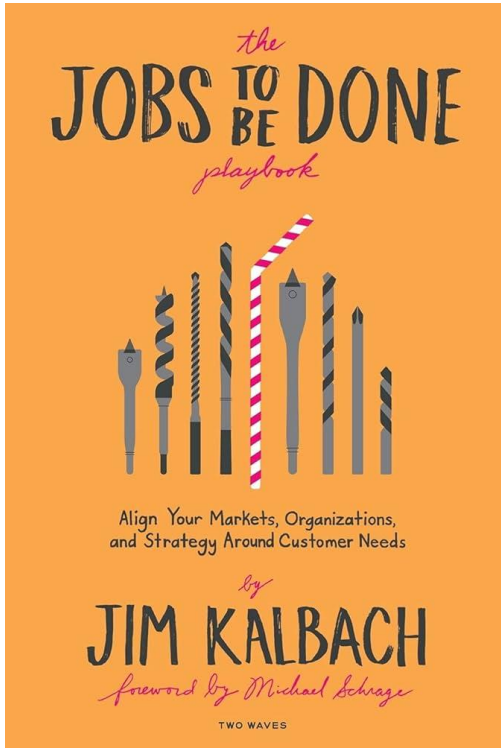
Q&A time

Toolkit

Template Links

📋 [Problem map](#)

🗂️ [Satisfaction gap survey](#)

📋 [Problem deep dive interview script](#)

⬜ ♂⬜ [Innovation framework](#)

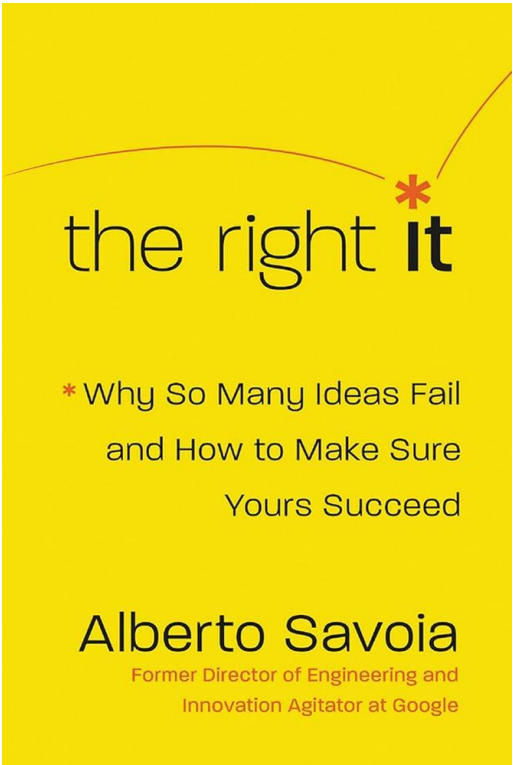# Books that influenced this framework
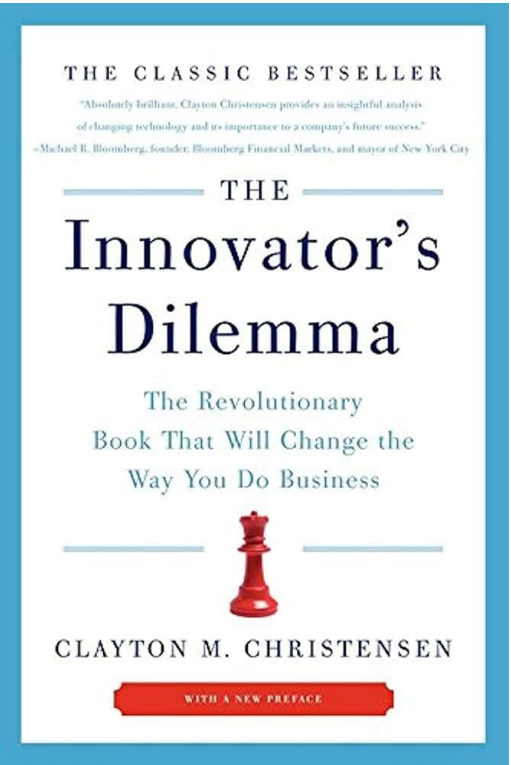
Stay hungry

The Jobs to be Done Playbook
Jim Kalbach

Build Better Products
Laura Klein

The Right It
Alberto Savoia

The Innovator's Dilemma
Clayton Christensen