Managing Field Research on the Future of Food

Evernote helped Migros collect research and develop the vision for a new in-store dining and takeaway experience. Throughout the project, the team used Evernote as a central knowledge hub to keep each other up-to-date. The app's availability across multiple platforms facilitated remote work and field research. Additionally, Evernote's collaborative features reduced the number of tools needed to manage the project—saving everyone time.

"Evernote allowed us to work faster, and we gathered a large amount of information within a short period of time. I don't know of any other application that gives me this kind of flexibility or lasting value."

Sandro Bedin | Head of Gastronomy, Migros

The need for a collaborative information management tool

As the head of Migros' gastronomy department, Sandro Bedin is responsible for whetting the appetites of many people. He unites the efforts of ten regional cooperatives into a singular vision: ensuring an assortment of food and drink options; maintaining short queueing times; facilitating an easy-going, inclusive atmosphere; and overseeing marketing training are just some of the responsibilities that fall onto Sandro's plate. One of his most recent projects was to assemble a 20-person team with the goal to gather field research and develop new concepts for Migros Restaurant and Take-Away locations. The new recommendations needed to address and accommodate changing food consumption trends and behaviors.

There are many floating pieces when conceptualizing a project with such a large-scale impact—in Migros' case, that means 300 Restaurant and Take-Away locations throughout Switzerland. Even the first phase of the project—gathering research and forming observations—implied a large kick-off meeting, followed by a string of sync-up meetings, Powerpoint presentations, and back-and-forth discussions. Sandro wanted to avoid the common pitfalls of information management. 'The seeds of great ideas should not be scattered between slide decks, text messages, and e-mails,' he thought. He needed one, central place to store all of his team's ideas. But moreover, simply storing information in one place would not be sufficient. Each member of the team also needed to be able to openly and easily discuss the research, observations, and ideas—both with one another and with external stakeholders.

MIGROS

Migros Genossenschafts Bund, commonly referred to as Migros, is Switzerland's largest supermarket, retailer, and employer. Its in-store restaurants and takeaway services also make it one of the country's most important gastro-vendors.

Industry

Retail

Size of Company

100,000+ employees

Evernote.com/business

While there are plenty of individual software and apps for storage, communication, and project management, using so many tools proved to be cumbersome and inefficient. Unsatisfied with the current array of workplace products at his disposal, Sandro turned his attention to Evernote. Because he found Evernote to be useful in managing his personal projects, Sandro decided to introduce Evernote Business to the rest of his team.

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Enter the elephant

Most of the people on Sandro's team were unfamiliar with Evernote Business as a solution for workplace and team collaboration, so Sandro showed his teammates the basics: how to log in, create notes, and add information. "It was quite easy, actually," he recalls of the onboarding experience. "I didn't spend any time configuring irrelevant settings. We just set up some ground rules and got started with our work."

Capturing everything quickly

For the first phase of the project, members of the team were tasked to collect ideas and conduct interviews with customers in every corner of Switzerland. They asked participants to provide their input and help refine new Migros Restaurant and Take-Away ideas. The research came in various forms such as audio recordings, text scripts, and photos of whiteboard sessions—all of which were kept in Evernote.

It didn't matter in which format the research came, nor whether an employee was using a Samsung or an iPhone. Evernote's availability on the web and on every major desktop and mobile platform meant that no matter an individual's personal preference, everyone on the team could sign in and see the same information.

Working from anywhere and everywhere

Evernote allowed Sandro and his team to access their research anywhere at anytime. The team used pre-installed software on work devices, but these tools did not work properly when out of the office, which became an obstacle for fieldwork. Sandro knew he needed a solution that facilitated mobile work. He discovered that by logging into Evernote through a web browser, he could access the team's research wherever his work takes him that day. This minor but important detail became critical when conducting on-site interviews, as the information-gathering phase of the project took place across Migros Restaurant and Take-Away locations throughout German-, French-, and Italian-speaking Switzerland.

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A hub for knowledge

Usually in a team, everyone has his or her own place for storing information. This often leads to transparency challenges. With Evernote Business, Sandro and his team grappled these challenges and kept each other up-to-date. Each employee first created his or her own workspace, for example, 'Alicia's Notebook'. Then, Sandro set up thematic business notebooks to which the entire team could contribute. For example, a notebook titled 'Man and Space' was dedicated to research related to purchasing behaviors. Another notebook titled 'Brand and Image' included information describing customers' feelings towards the Migros brand and competitor brands. A third notebook, 'Interesting Trends', contained studies, reports, and links to videos focusing on gastronomical themes. Finally, a 'Various' notebook housed all the information which didn't belong in the preceding notebooks.

By keeping all research data in Evernote, the team could have more frank and open discussions about project details. As the project owner and Evernote Business admin, Sandro also had a clear overview of all the notebooks created by his team. He could rearrange the information, edit and refine the notes for presentations, and even export the contents of the notebooks to share findings with different stakeholders.

One tool, many capabilities

The team also did away with extraneous software that they had used in previous projects, including Excel and Powerpoint. Because Evernote makes it easy to create tables and presentations in-app, simple tasks like sharing, discussing, and collaboration could easily be managed within one tool.

Digital and analog

Once the research phase of the project was completed, the team held three workshop days to present their findings. All of the research and ideas from the "Trends" notebook were printed out and posted on a 4x4 meter wall. Armed with post-its, stickers, and markers, the team then got to work: common user needs and customer behavior were identified and grouped together; competing ideas were discussed and scored; and all of the concepts from the workshop sessions were then refined, scoped out to the fullest, and printed into a physical concept manual summarizing the project findings.

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Sandro credits Evernote for facilitating all the legwork leading up to the final result. "If it wasn't for the app, the cost of project management and expenditure would have been much greater since we needed to collect so much information," says Sandro. Evernote reduced the number of tools needed to collect information and discuss ideas. Furthermore, the team was able to track the entire process along the way, setting a better standard for future projects. All of the interview material is now stored in one place and can be accessed in the future at any time.

"We could not have created the end concept manual like we did if it were not for Evernote. Evernote allowed us to work faster, and we gathered a large amount of information within a short period of time. I don't know of any other application that gives me this kind of freedom or lasting value."