



Agenda

- Barriers to User Research
- Understanding the Different Types of Research
- How to Learn from Your Audience: Focus groups, User Interviews and Usability Tests
- Your Number One User Research Tool
- 7 User Research Tactics
- Preparing Your Findings
- Q&A







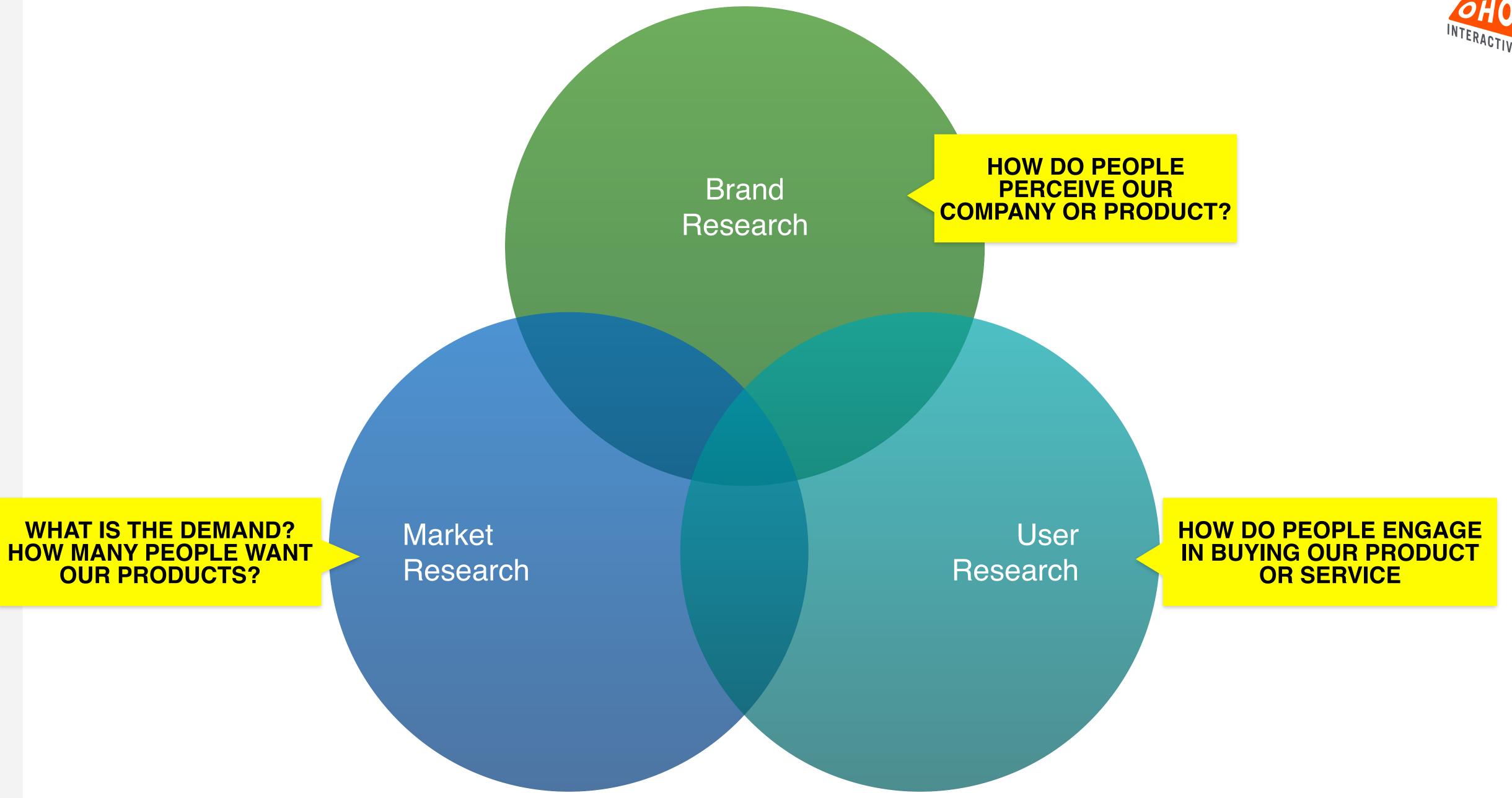
We don't have time!





Different Types of Research







The Types of Research

Market Research

- How many prospective buyers are in our target geographies?
- What industries need to have more training for employees?
- What is the age and population needing health insurance or health care?

Brand Perception Research

- What do people associate with our organization or company?
- What words come to mind?
- How top-of-mind is our organization?

User Research

- What motivates users to take action?
- What is the customer/buying journey?
- What are the different personas?
- How is the brand coming across and driving action?



Clearing Up Customer Personas

Demographic Personas – good for buying advertising by income, gender, age segments, etc.

Personality Personas – "new moms" or "seniors" – good for developing messages

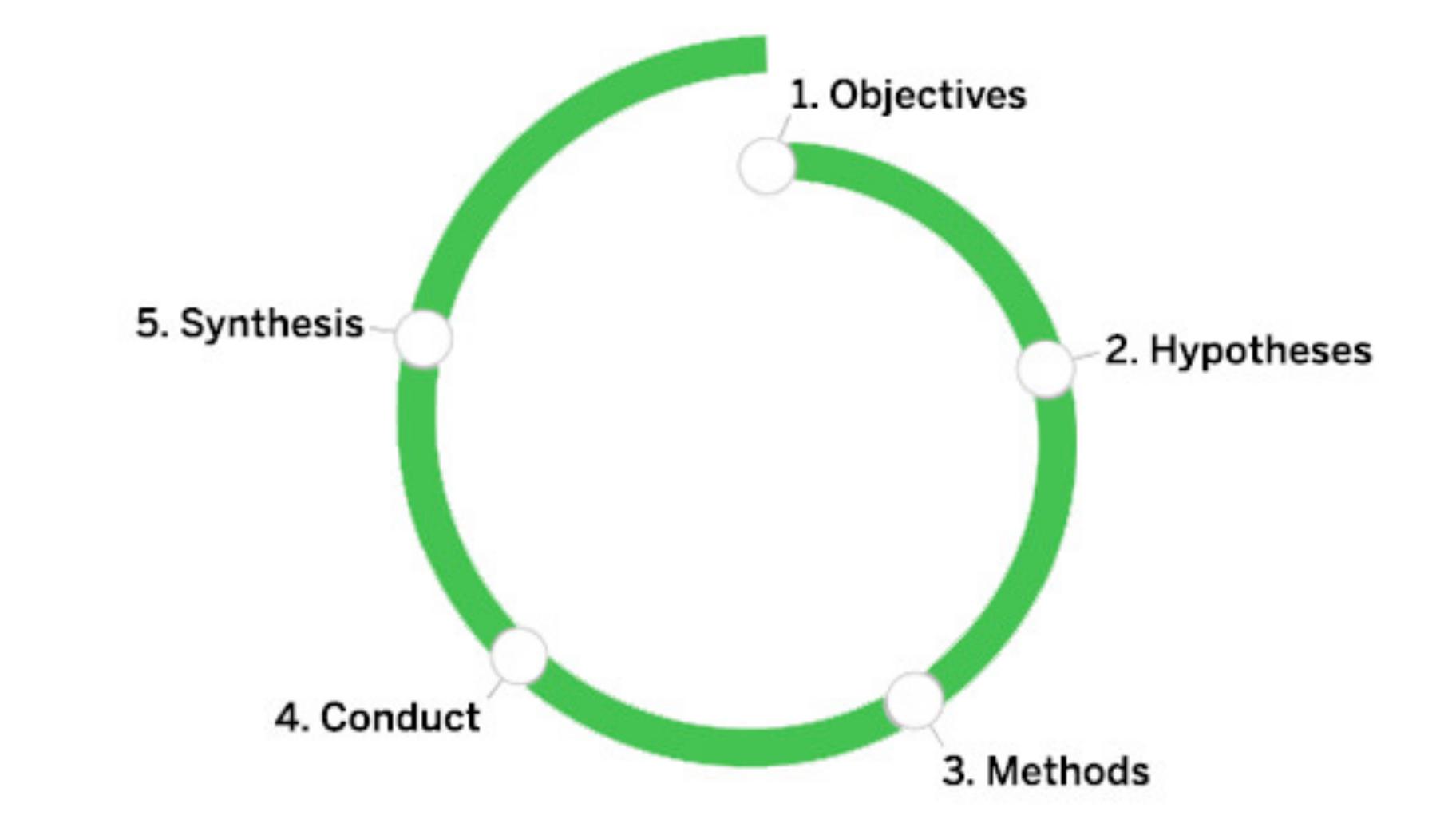
Buying Personas – "researcher" vs. "impulse buyer" – defining different journey maps and prioritized content needs



Learn from Your Audience Focus Groups, 1:1 and Usability Testing



Research Learning Spiral







Focus Groups

Excellent for gathering high-level reactions

Brand Activation

- Understand preferences and attitudes
- Gut reactions to designs or messaging

Cons

- Don't cover as much ground as a user test
- Must guard against group think
- Need to facilitate getting everyone to speak





What is your reaction to these methods?
Which bread slicing method do you prefer?



Conducting a Focus Groups

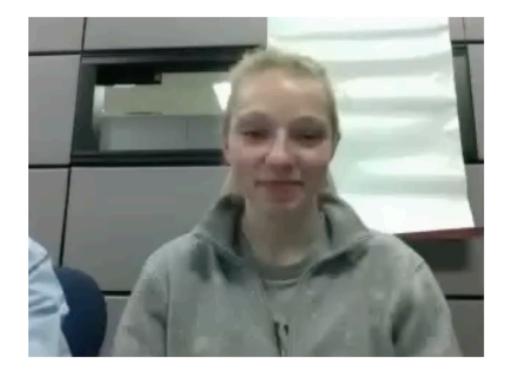
Pre-work

- Gather 6-12 people
- Need to align with your persona/target market
- Complete a pre-survey
- Bring tent cards for names (in person)

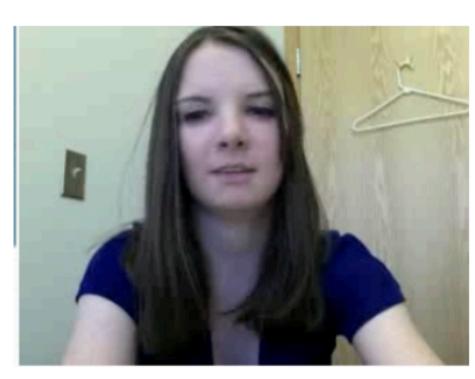
During the session

- Introduce the session: purpose, length, your name
- Focus on facilitating the conversation, not note taking
- Record the session for textual analysis
- Use pre-survey as information for starting questions
- Ask open ended questions
- Use strategies that make people vote or require an answer from everyone
- Stay neutral, but engaged

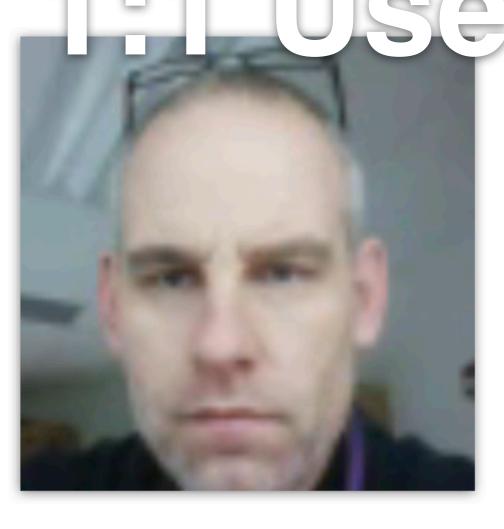


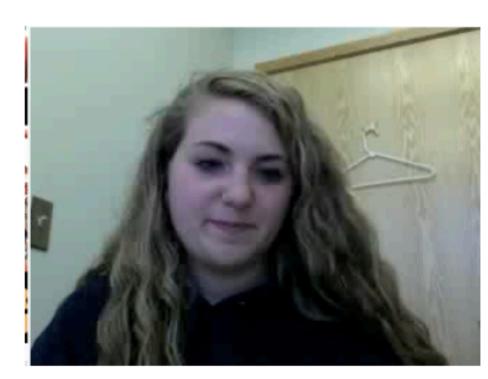




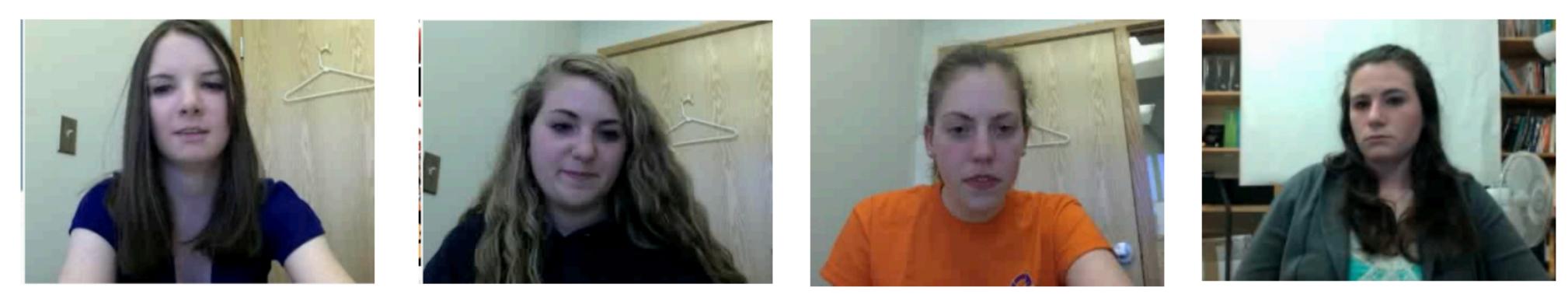


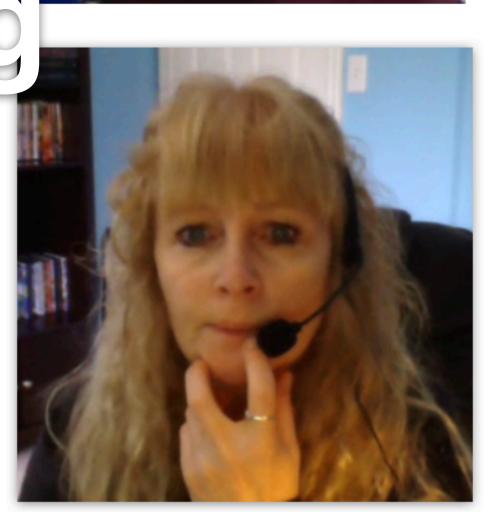


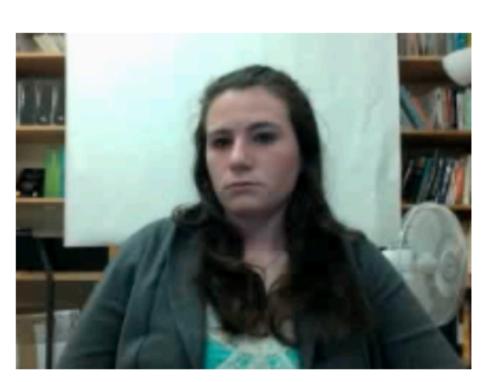














1:1 User Research

Excellent for gathering reactions and behavioral and contextual research

- Higher degree of relevance asking someone who could be an eventual end user
- Observe information about design and brand
- Understand user motivation and process
- Gather information about usability and UI patterns
- Able to use actual pathways and interfaces
- Avoid group think

Factors

- Recruit from different persona groups
- Unnatural environment
- Desire to please
- Work harder than they would in the natural environment
- Don't test the UI that you designed or developed



How would you approach dividing this loaf of bread?



Usability Testing

Usability is a quality attribute that assesses how easy user interfaces are to use.

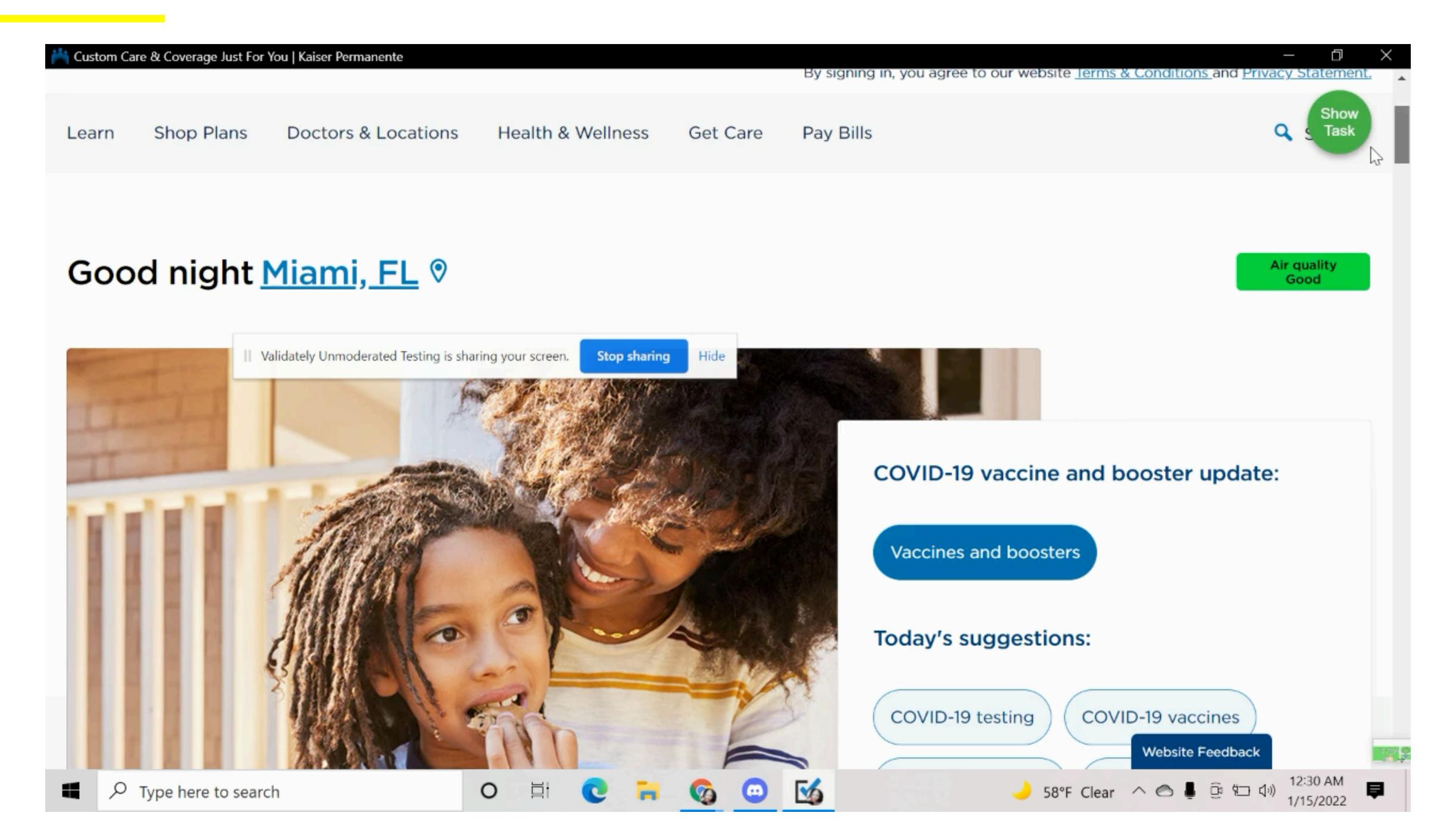
- Learnability: How easy is it for users to accomplish basic tasks the first time they encounter the design?
- Efficiency: Once users have learned the design, how quickly can they perform tasks?
- Memorability: When users return to the design after a period of not using it, how easily can they reestablish proficiency?
- Errors: How many errors do users make, how severe are these errors, and how easily can they recover from the errors?
- Satisfaction: How pleasant is it to use the design?

Factors

- Assume that this is a valid thing to do
- Doesn't ask would you ever register for this product
- The task does not need to be relevant to the user

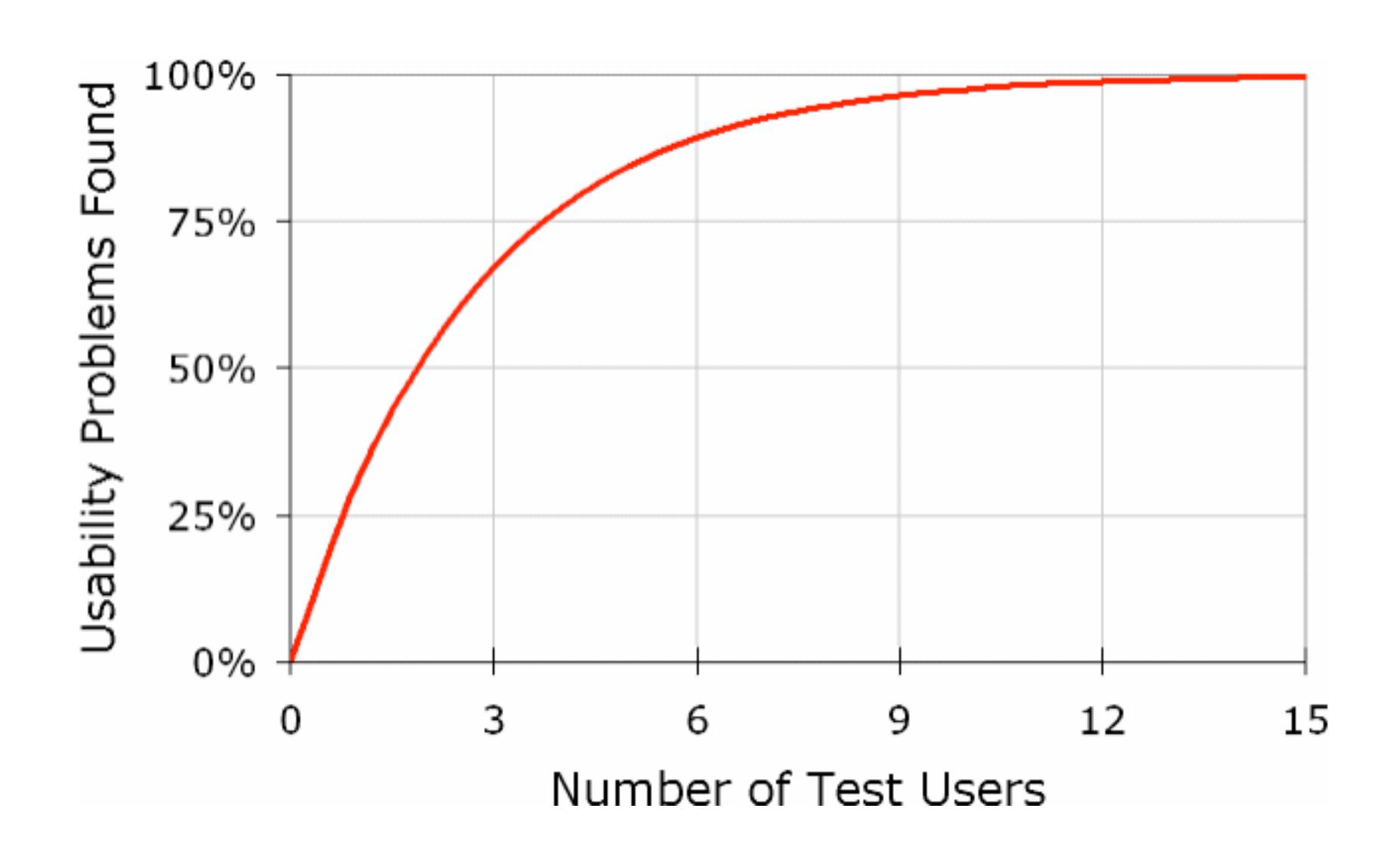


Can you cut this bread with this knife?





How Many Users to Test?





Your #1 User Research Tool



"Thinking aloud should be the first tool in your UX toolbox."

Jakob Nielsen



Thinking Aloud

"In a thinking aloud test, you ask test participants to use the system while continuously thinking out loud — that is, simply verbalizing their thoughts as they move through the user interface."

Three simple steps:

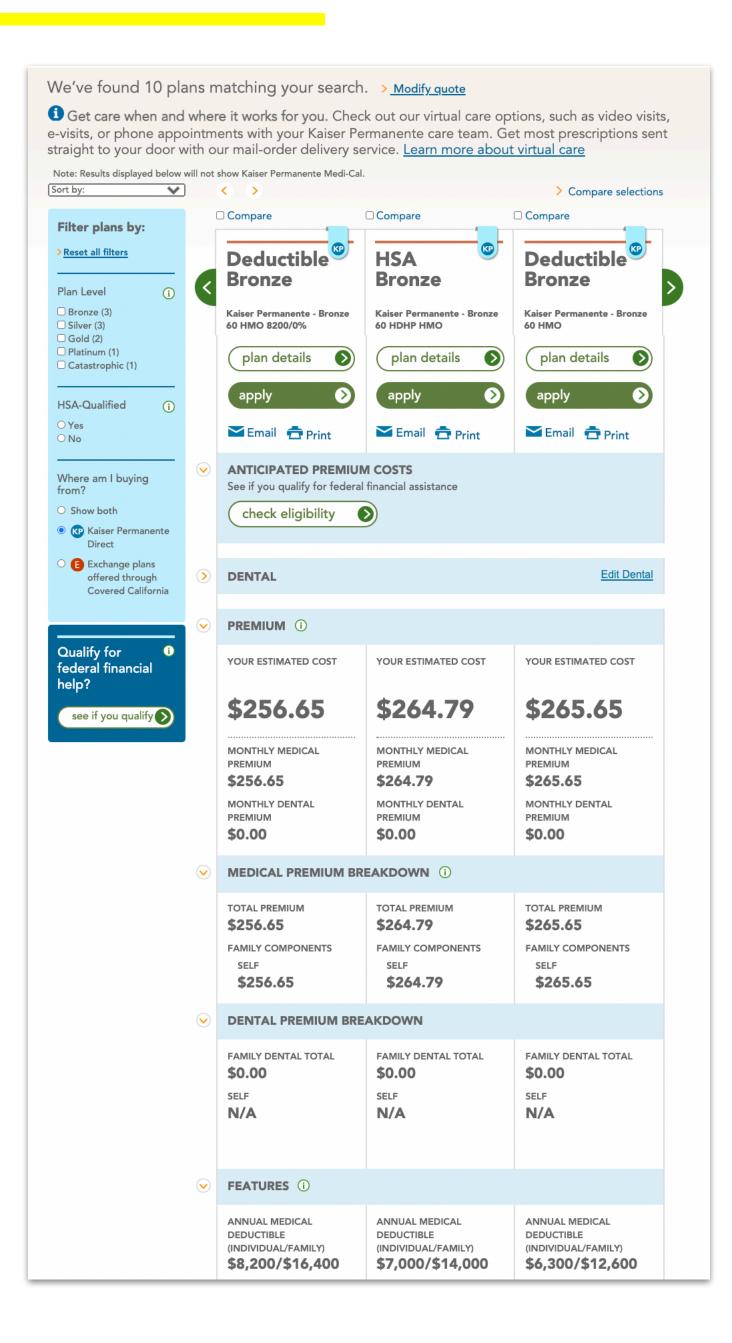
- Recruit representative users.
- Give them representative tasks to perform.
- And ...

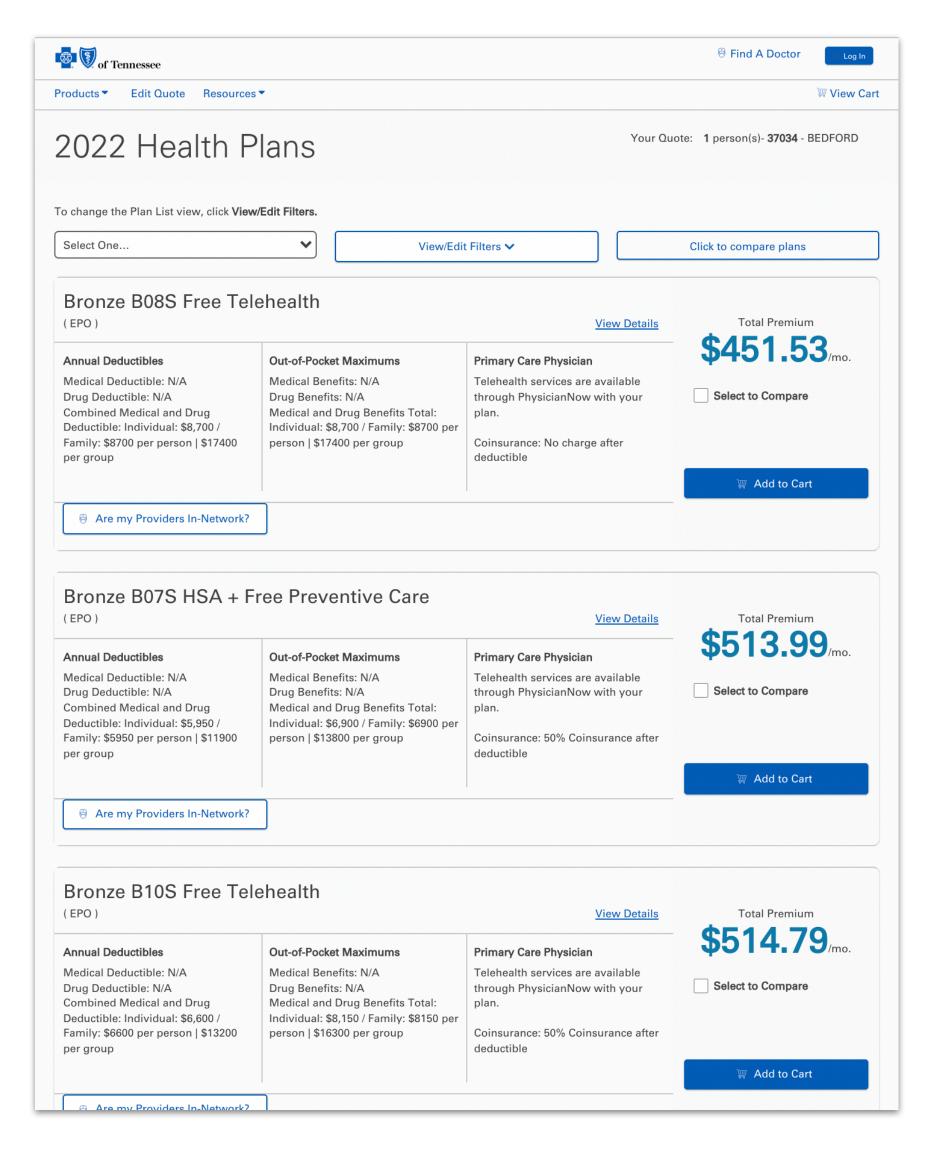


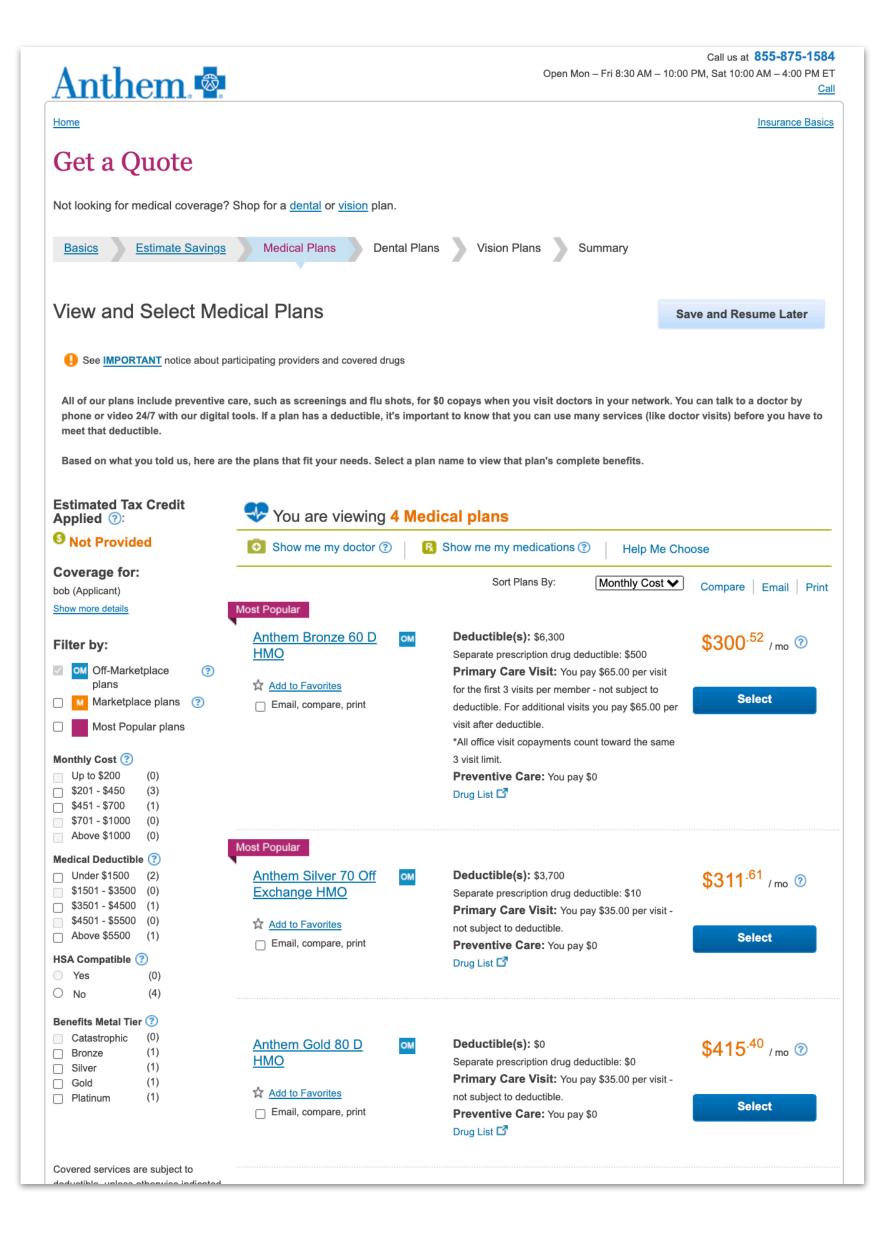
Sample Thinking Aloud

PLAN FINDER USER TEST

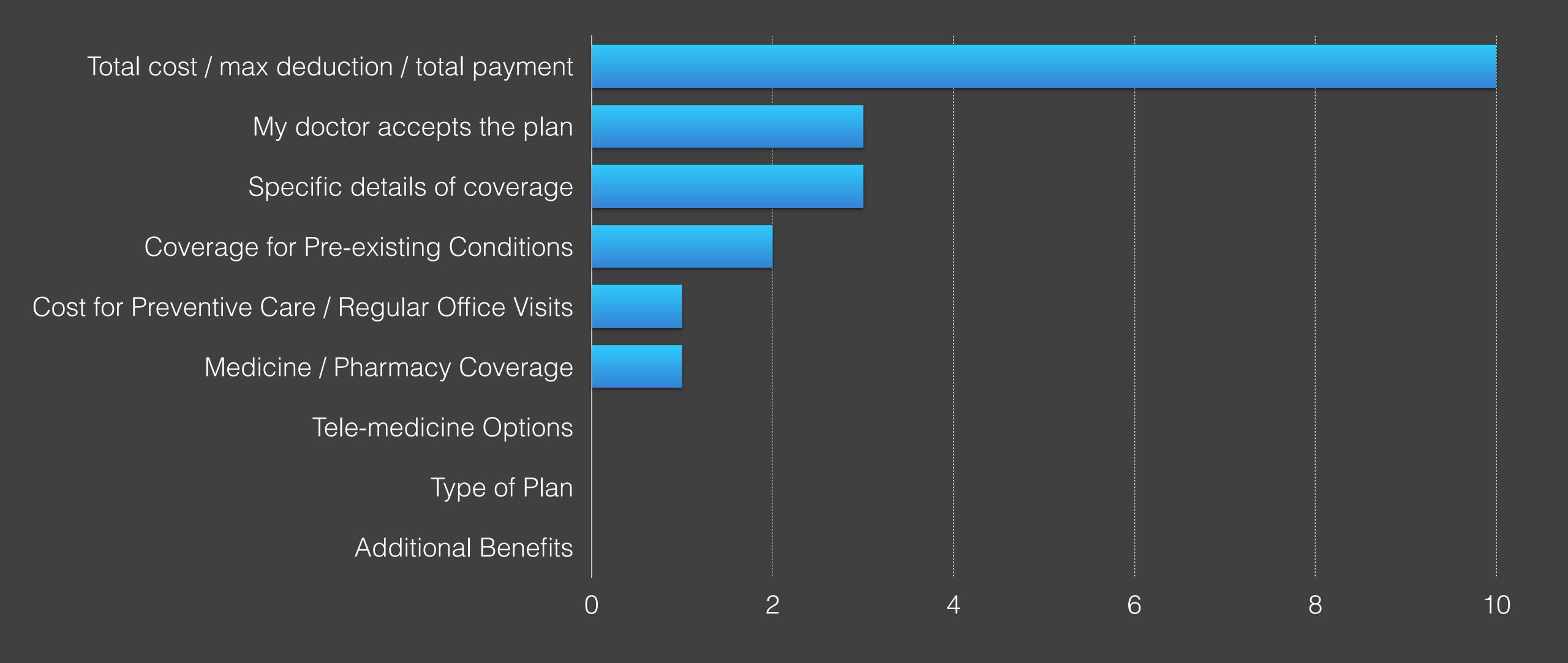




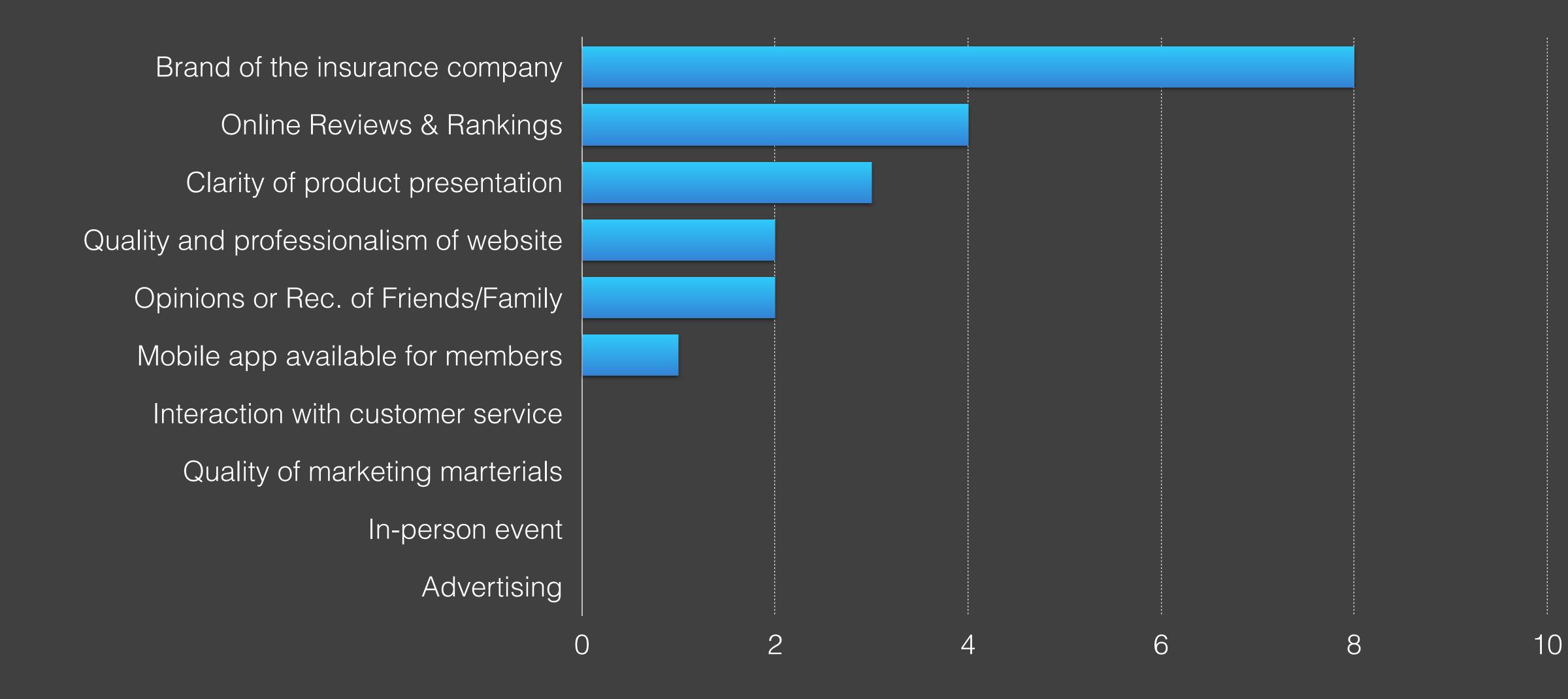




Prioritized Needs



Influencers

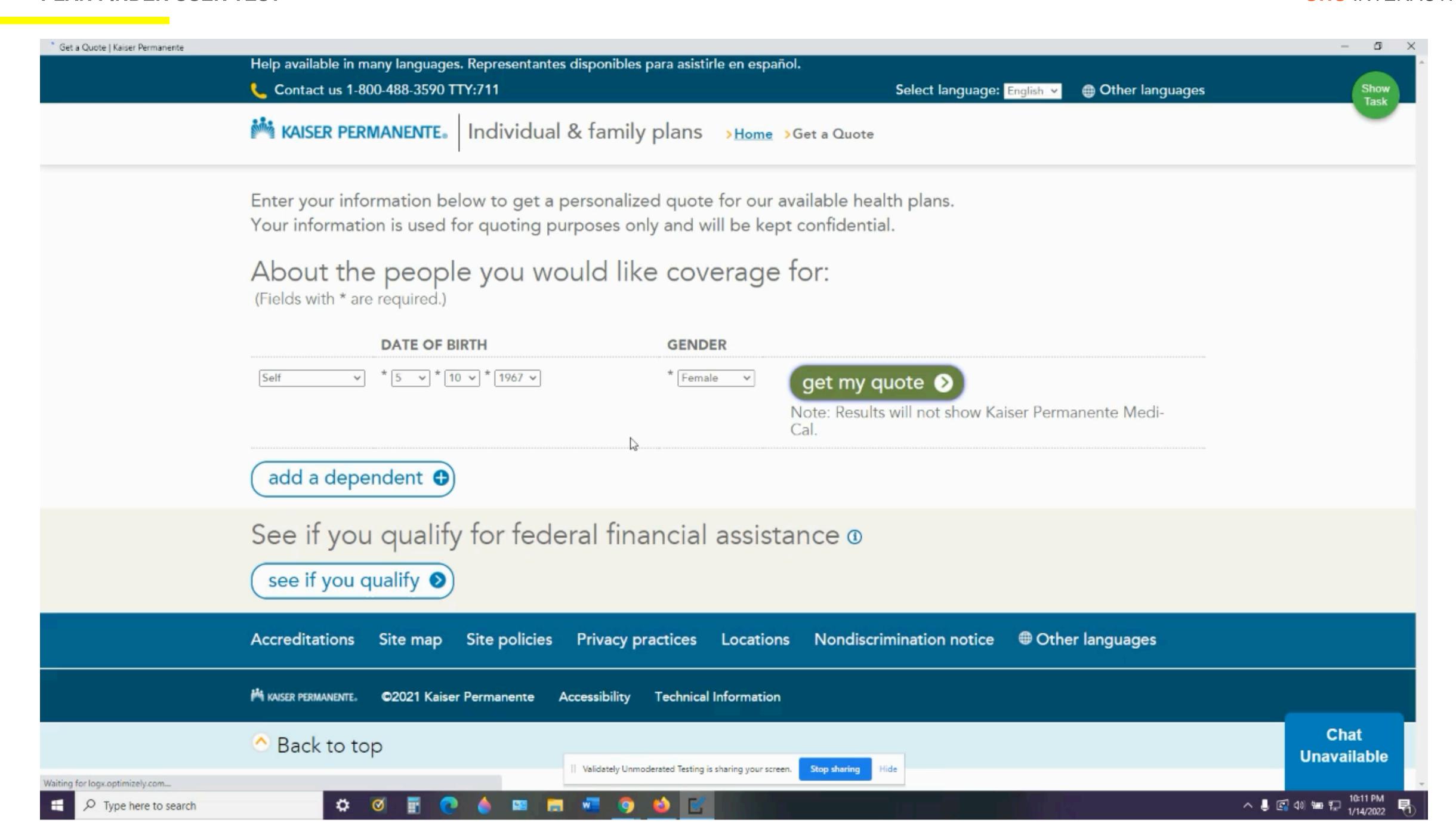


Task

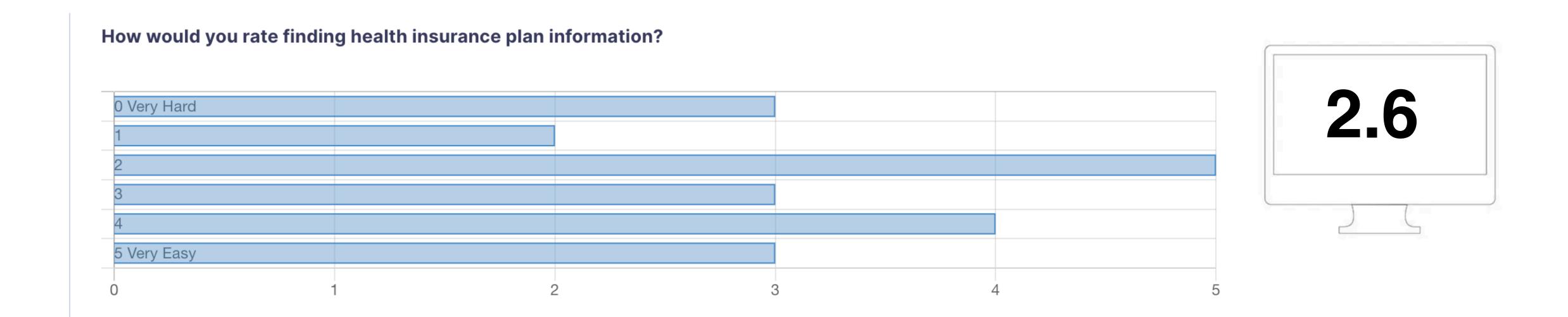
Imagine that you are looking to purchase a new health insurance policy (not dental, vision or medicare).

You are considering enrolling in an INDIVIDUAL or FAMILY plan directly from the company (not through your employer).

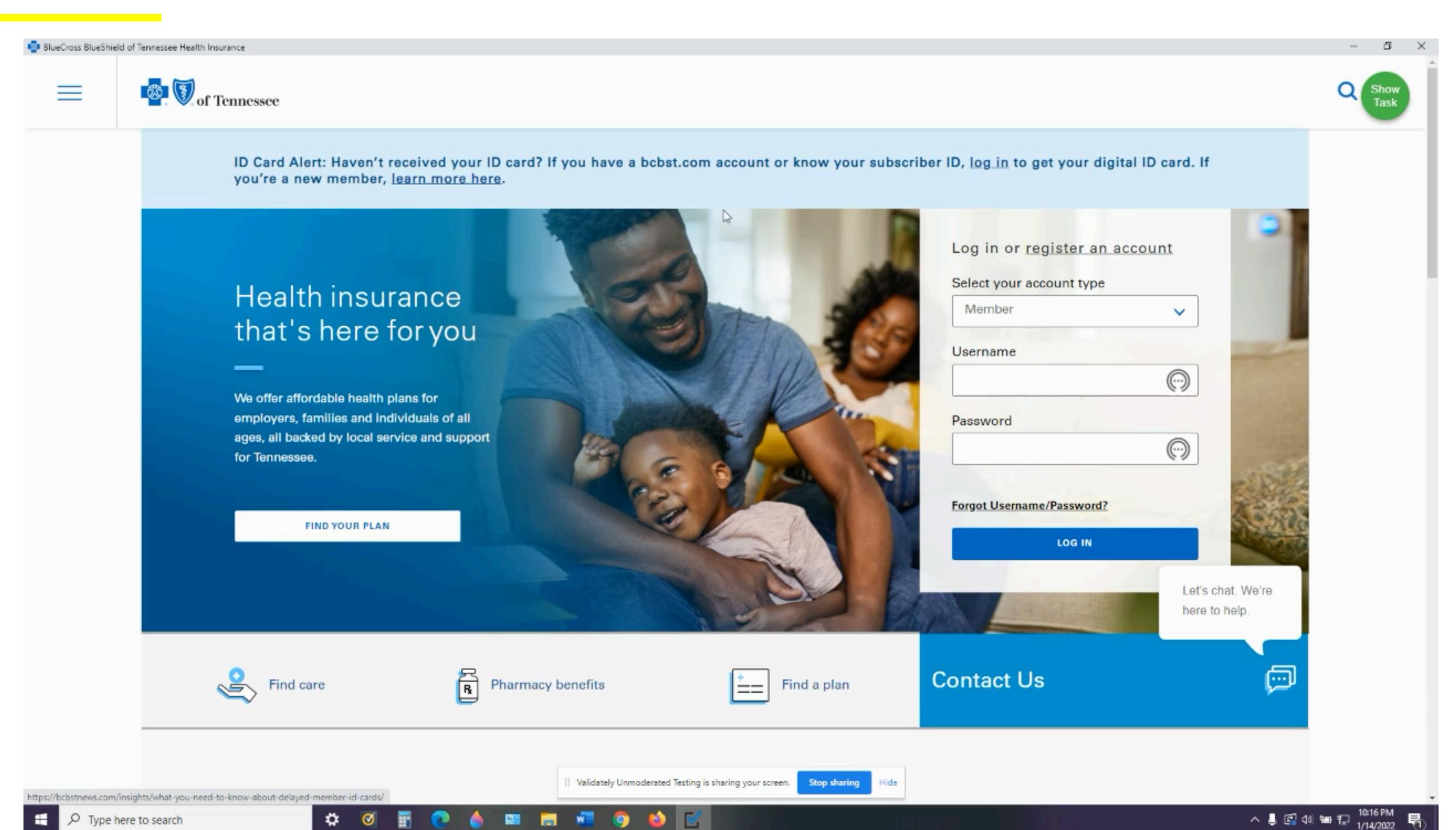
Please find the individual or family plans and find the plan with the lowest out of pocket cost.



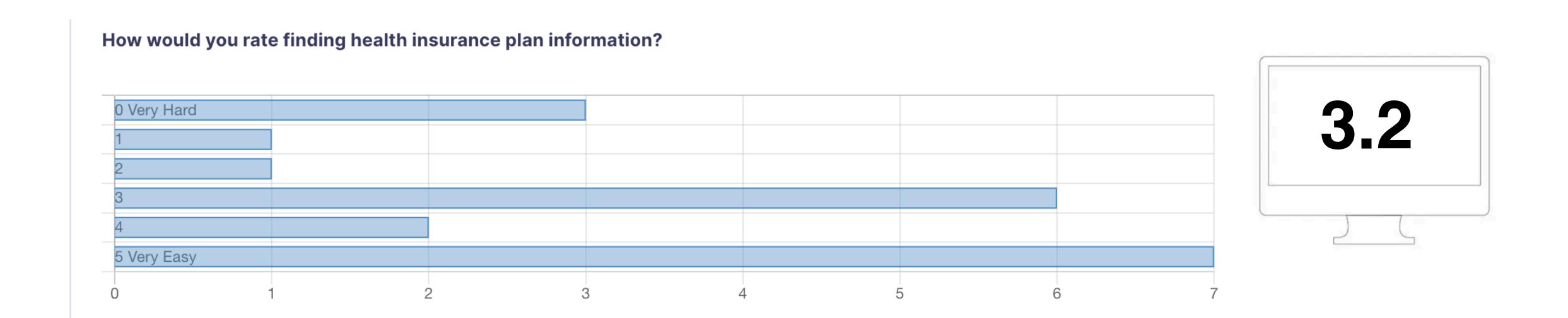
Kaiser – Ease of Use



PLAN FINDER USER TEST
OHO INTERACTIVE



BCBS Tennessee – Ease of Use



Ease of Use Comparisons





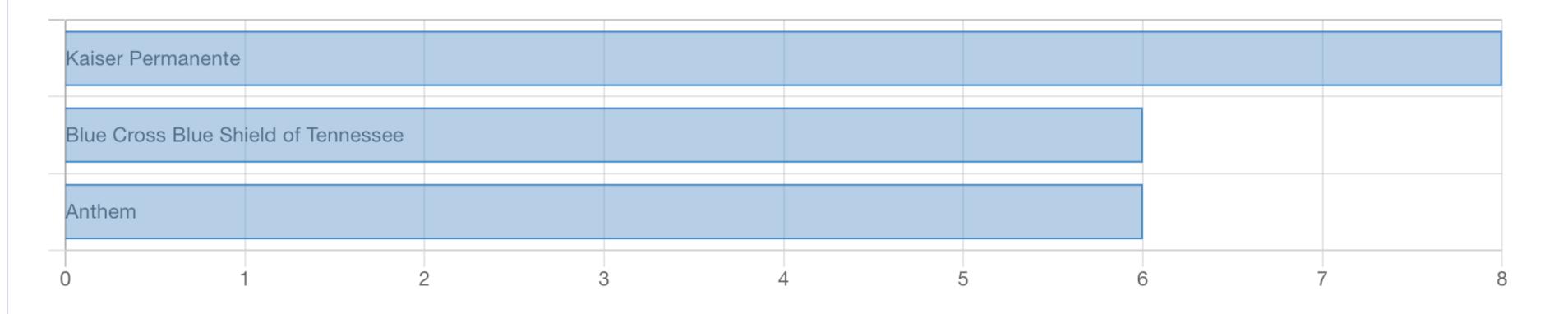


Kaiser Permanente

BCBS Tennessee

Anthem

Which of the websites made the task of finding insurance the easiest?



How to Improve? Top Open Response

Easier Path to Plan Finder: 5

Reduce Amount of Personal Information Required: 5

Improvements to Plan Finder Interface: 4

Navigation and Wayfinding: 4

Design: 3

USER COMMENTS

OHO INTERACTIVE

Easier Path to Plan Finder (5)

- "The best route from point a to b is a straight line. This applies to websites as well."
- "Make a quick link at the top of the website home page to shop plans"
- "I would like to get to the insurance info/comparison screens quicker."
- "just one click that gives me a table with all the relevant information for all plans so that i can compare each one"
- "just show the plans on the first page"

Reduce Amount of Personal Information Required (5)

- "I would have a shortcut to get to the plans without questions about income or other advertising."
- "Having a direct quote option instead of having to click through links."
- "Reduce the basic information required to get to a point of comparing plans"
- "Do not ask intrusive questions about my info BEFORE giving me info on the various plans."
- "Not having to enter in so much information.

Plan Finder User Interface (5)

- "Have the select box more obvious and sort by options for results."
- "Make it easy to compare plans at a glance"
- "Consolidate the plans for comparisons"
- "Always have a comparison chart detailing all relevant information."
- "Having a lowest price filter"

Navigation & Wayfinding (4)

"Simplify navigation"

"Easier navigation on the homepage."

"Better menu options"

"Easier paths to follow"

Design (3)

- "More colorful displays"
- "Make use of the open white space to compare more at a time"
- "Make the fonts bigger"

Simple Overview Price Chart (2)

- "Average price chart that you could view"
- "Give a general overview of plans with estimated costs based on zip code."

Content (2)

- "More instructions needed"
- "Having more information or a video on how to understand the jargon"

Chat (2)

- "Having a chat available"
- "A pop up tap that allows the person to ask AI or a live person any questions they may have"

Readability (2)

- "Make it easy to read"
- "Less words"

Doctor Coverage (2)

- "I'd like to be able to confirm doctor/clinic coverages"
- "Make it clear what costs are for in and out of network physicians"

Other Services/Features (2)

- "I'd like to be able to see a list of services etc. and the associated costs so everything is clear"
- "Make prescription drug costs for generic, brand, on formulary, off formulary available so people can estimate costs"

View Plans by Existing Medical Condition (1)

• "Let a user put in some relevant healthcare needs and estimate costs across multiple plans."

Technical (1)

"Quicker loading times"

Recommendations

Usability Testing: Discover and fix rudimentary barriers to access

Design: Limit the amount of text and use white space to highlight next steps and action buttons

Filters: Users did not engage with the filters – keep these simple and clearly labeled.

Contextualize Price: costs are large and intimidating

Comparison: Provide methods to easily compare plans

Orient Prospects: Help them get oriented to plan offer and pricing in one table



7 Tools & Techniques for User Research



1. Surveys

- Surveys are a great starting or finishing point to user research:
 - Make your survey also be a screener for your user research
 - Discover trends and themes
 - Validate your qualitative research with a statistically accurate survey with a large sample
- For unmoderated surveys avoid free response questions they are not answered
- Ask users about preferences and priorities
 - Rank the items least valuable to most valuable?
 - Which words do you associate with the company or school?
 - Who influenced your decision to apply?
- Collect demographic information last



2. Card Sorting

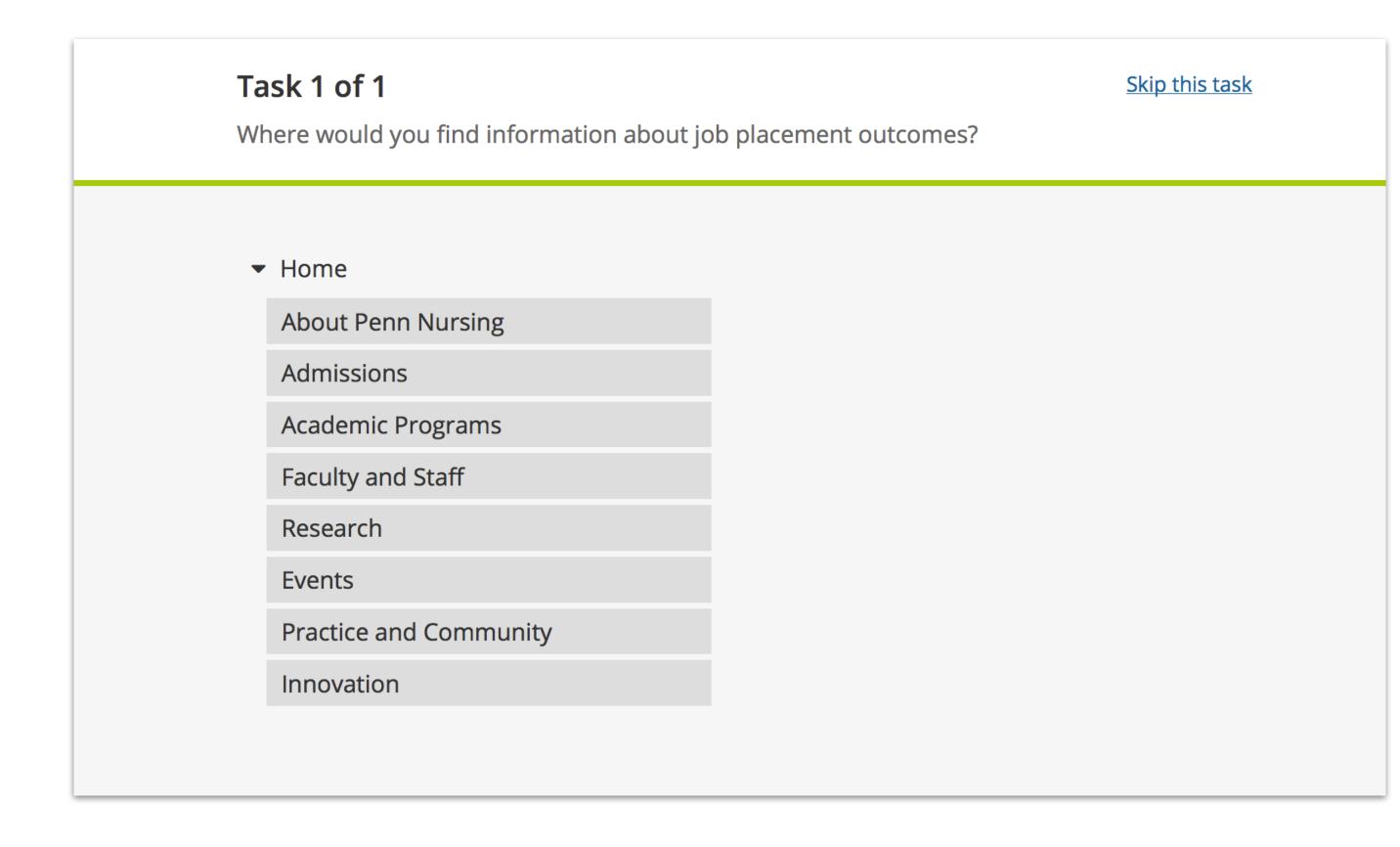
- A card sorting activity can help understand and document a user's mental model for the organization of content.
- Can be used for feature prioritization as well.
- Can be conducted online or in-person





3. Leaf Testing

- Is your navigation useful?
- Does it align to user expectations?
- Is your language clear?





4. 10-Second Design Reviews

- Show users key pages or a print spread for 10 seconds
- After showing all the designs, ask them to rank the designs
- Gather a gut reaction to design and gauge attitudes
- Ensure that the brand is coming across



Microsoft Product Reaction Cards

The complete set of 118 Product Reaction Cards								
Accessible	Creative	Fast	Meaningful	Slow				
Advanced	Customizable	Flexible	Motivating	Sophisticated				
Annoying	Cutting edge	Fragile	Not Secure	Stable				
Appealing	Dated	Fresh	Not Valuable	Sterile				
Approachable	Desirable	Friendly	Novel	Stimulating				
Attractive	Difficult	Frustrating	Old	Straight Forward				
Boring	Disconnected	Fun	Optimistic	Stressful				
Business-like	Disruptive	Gets in the way	Ordinary	Time-consuming				
Busy	Distracting	Hard to Use	Organized	Time-Saving				
Calm	Dull	Helpful	Overbearing	Too Technical				
Clean	Easy to use	High quality	Overwhelming	Trustworthy				
Clear	Effective	Impersonal	Patronizing	Unapproachable				
Collaborative	Efficient	Impressive	Personal	Unattractive				
Comfortable	Effortless	Incomprehensible	Poor quality	Uncontrollable				
Compatible	Empowering	Inconsistent	Powerful	Unconventional				
Compelling	Energetic	Ineffective	Predictable	Understandable				
Complex	Engaging	Innovative	Professional	Undesirable				
Comprehensive	Entertaining	Inspiring	Relevant	Unpredictable				
Confident	Enthusiastic	Integrated	Reliable	Unrefined				
Confusing	Essential	Intimidating	Responsive	Usable				
Connected	Exceptional	Intuitive	Rigid	Useful				
Consistent	Exciting	Inviting	Satisfying Valuable					
Controllable	Expected	Irrelevant	Secure					
Convenient	Familiar	Low Maintenance	Simplistic					

- Supplement with the brand personality
 language
- Include brand attributes as positive terms



Microsoft Product Reaction Cards

Northeastern U.	Lesley University	Harvard Extension School	Drexel University	Simmons	
Sophisticated	Useful	Sophisticated	Stimulating	Uncontrollable	
Accessible	Connected	Attractive	Appealing	Busy	
Desirable	Predictable	Simplistic	Attractive	Hard-to-Use	
Usable	Usable	Useful	Hard-to-Use	Unconventiona	
Attractive	Appealing	Appealing	Not-Valuable	Fresh	
Familiar	Attractive	Easy-to-Use	Stimulating	High-Quality	
Usable	Usable	High-Quality	Unconventional	Simplistic	
Desirable	Complex	Accessible	Complex	Inconsistent	
Inviting	Inconsistent	Appealing	Desirable	Too-Technical	
Promising	Not-Valuable	Desirable	Inviting	Overwhelming	
Not-Valuable	Confusing	Confusing	Confusing	Fresh	
Simplistic	Overbearing	Inconsistent	Unconventional	Unconventiona	
Usable	Overwhelming	Gets-in-the-Way	Unpredictable	Useful	
Consistent	Inviting	Comprehensive	Appealing	Easy-to-Use	
Reliable	Organized	Efficient	Hard-to-Use	Fresh	
Usable	Useful	Useful	Fun	Stimulating	
Attractive	Easy-to-Use	Attractive	Attractive	Consistent	
Relevant	Straight-Forward	Easy-to-Use	Fun	Efficient	
Organized	Time-Saving	Organized	Stimulating	Usable	
Confusing	Empowering	Gets-in-the-Way	Fresh	Busy	
Gets-in-the-Way	Organized	Inconsistent	Stimulating	Overbearing	
Usable	Straight-Forward	Unpredictable	Unconventional	Usable	
red-2	red-6	red-6	red-10	red-10	
yellow-2	yellow-0	yellow-2	yellow-2	yellow-3	
green-23	green-22	green-20	green-16	green-15	



5. System Usability Scale

Users answer each question on a 1-10 scale

- I think that I would like to use this system frequently.
- I found the system unnecessarily complex.
- I thought the system was easy to use.
- I think that I would need the support of a technical person to be able to use this system.
- I found the various functions in this system were well integrated.
- I thought there was too much inconsistency in this system.
- I would imagine that most people would learn to use this system very quickly.
- I found the system very cumbersome to use.
- I felt very confident using the system.
- I needed to learn a lot of things before I could get going with this system.



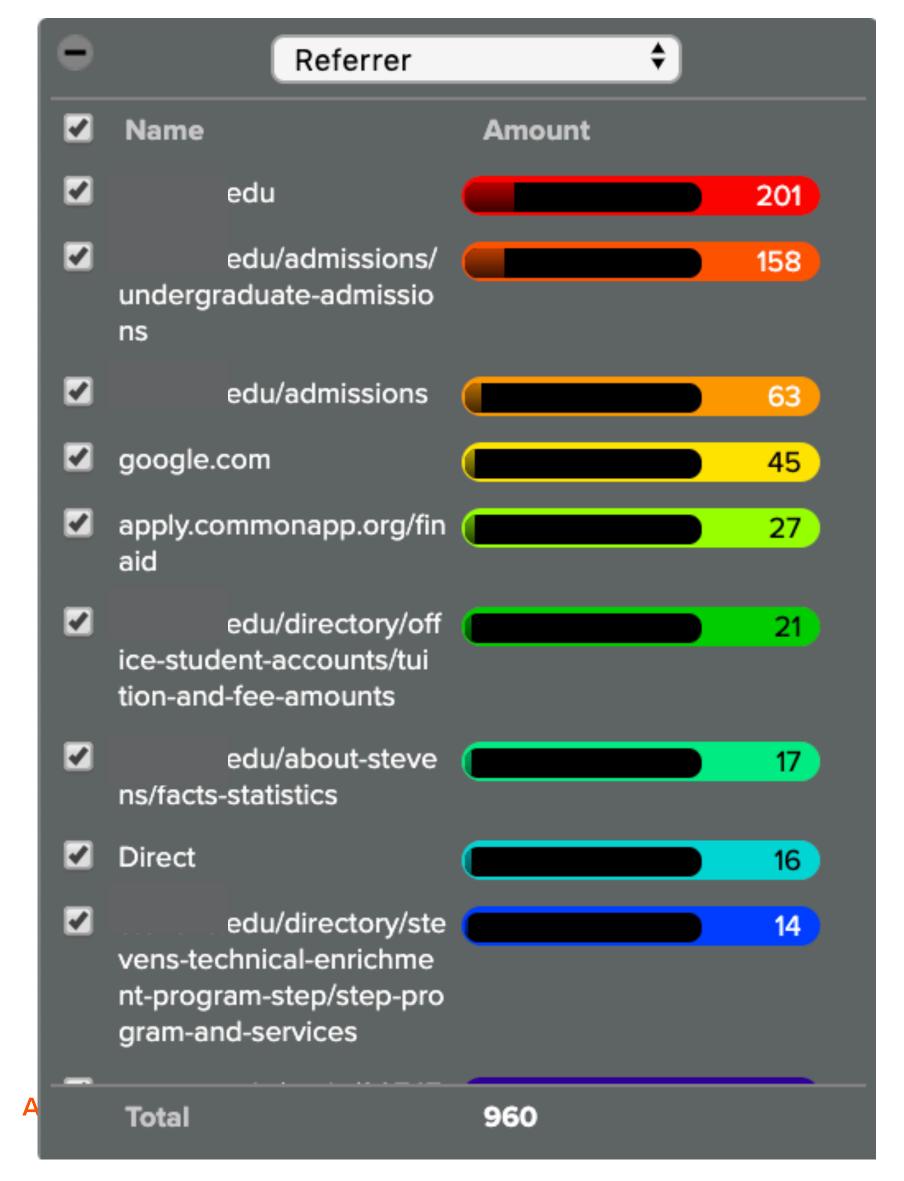
6. Heat Maps – Crazy Egg, Hot Jar

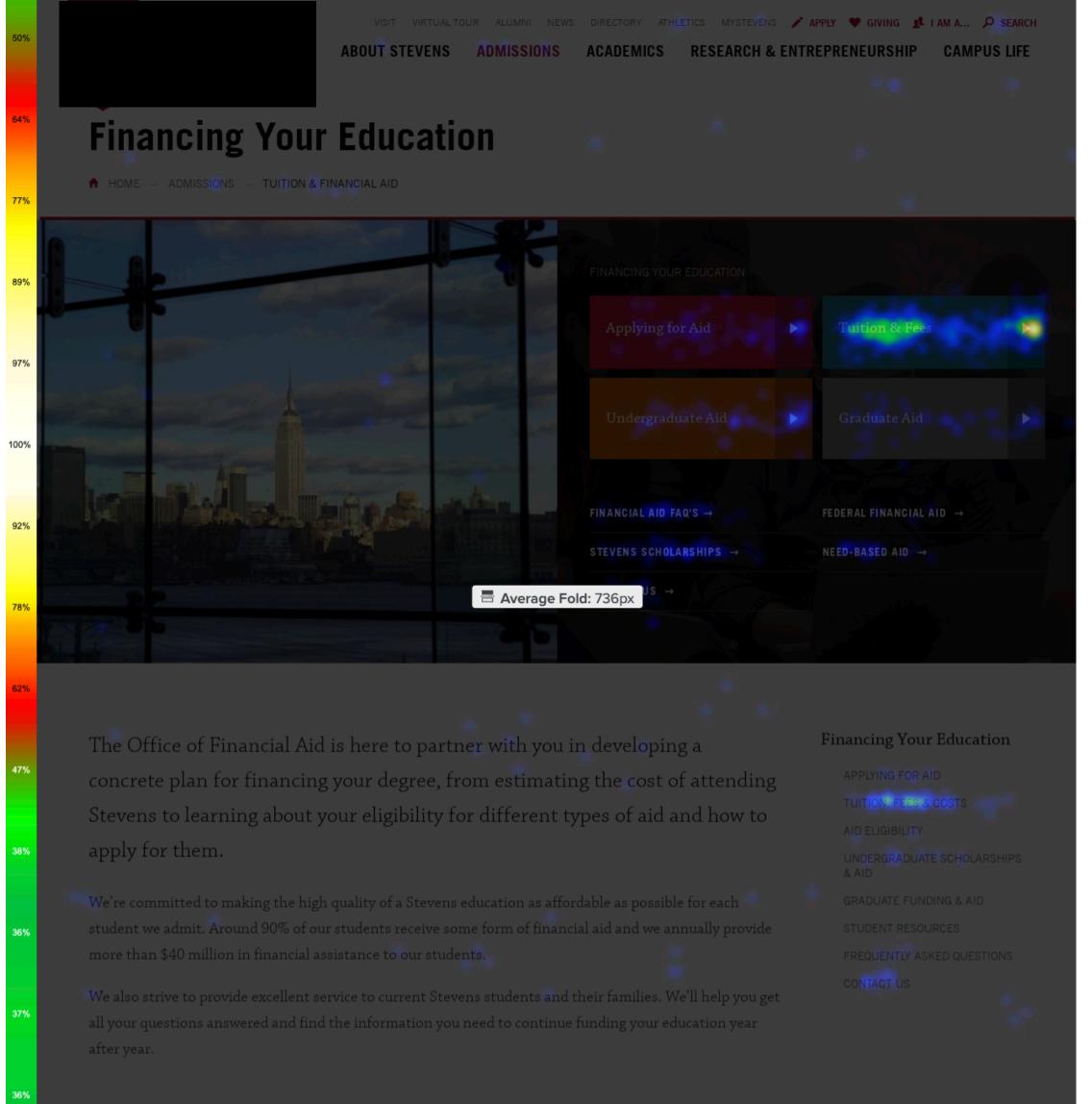
- Valuable for understanding how users are interacting with an interface
- Can identify usability issues
- Use as a starting point for interviews or to validate something discovered during interviews
- More of a challenge to understand what users want instead or the best path for changing the interface





Heat Maps - Crazy Egg, Hot Jar





7. Blended Testing

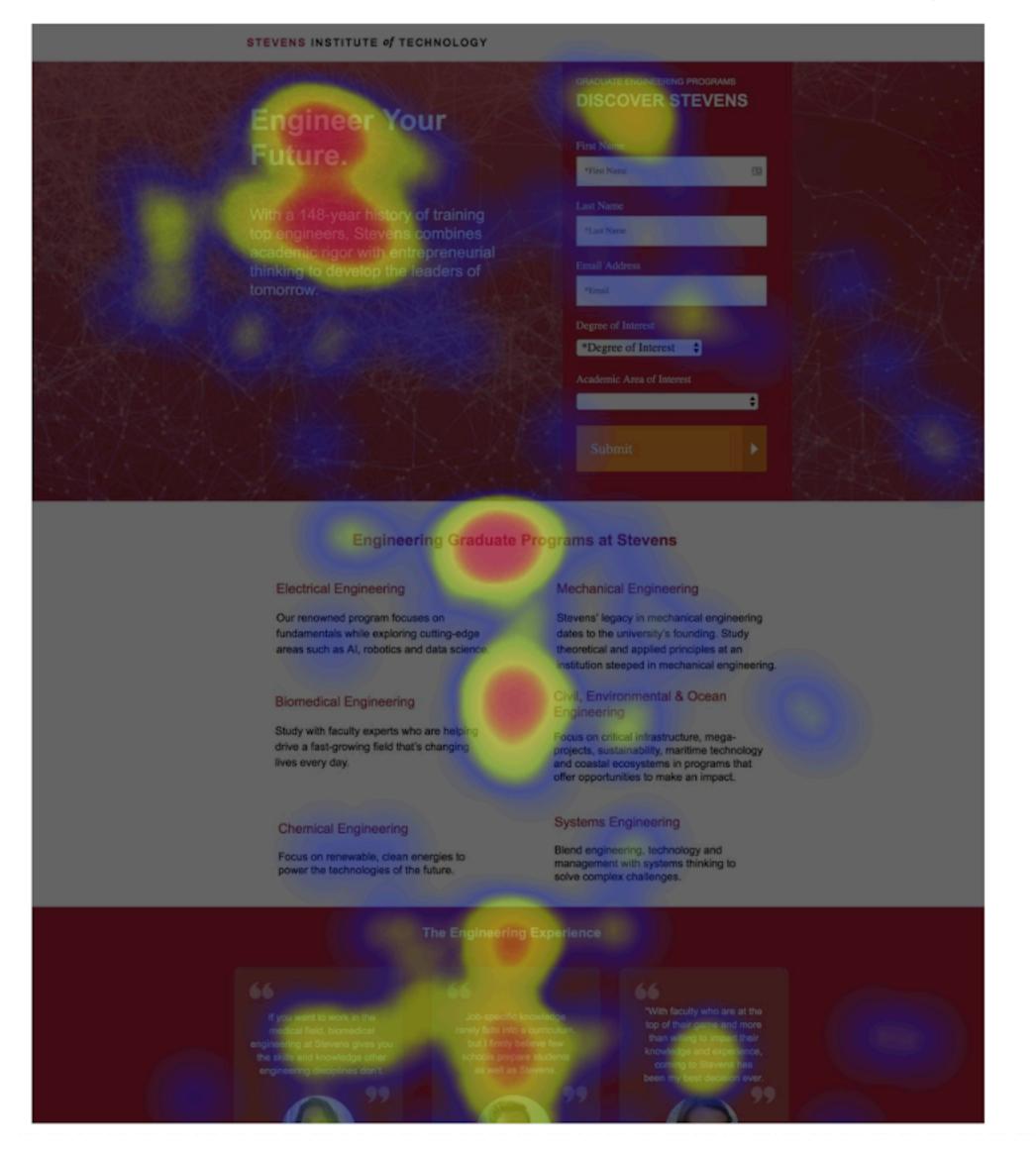
- Combines quantitative testing with with qualitative feedback
- Best for testing a complete, fully-designed interface
- Used to test single pages and especially pages that are focused on conversions





Reaction Map (hide)







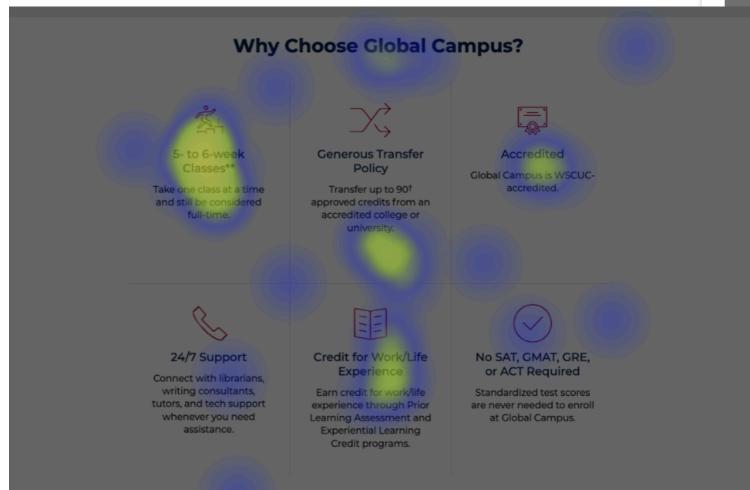
Q

Likes

Users are asked a series of questions – they click on the page to leave a comment.

Here, the "heat map" shows the positive comments.

The first icon section tested well.





Quotes

This is the area of study I am most interested in. If I was to go back to school, this is what I would study.

Female \$\$50k-\$99k Bachelor's Degree or Higher 45-54

Search quotes..

This is a section that displays various links for various information I can look up that I would definitely click to get more information

\$\$0-\$49k 🗃 Associate's Degree 🛗 55+ 🕴 Male

This paragraph provides enough information to make me want to learn more while making me think I truly understand what they offer.

∮Male \$\$50k–\$99k ≈ Associate's Degree 🖽 55+

A list of programs as shown and, if I am correct, if I were to click on one of those, it might give me additional details on exactly what programs are available and maybe additional information such as course schedule

\$\$0-\$49k 🗃 Associate's Degree 🖽 55+ 🕴 Male

The picture of the woman studying and I want to do that

Because it is the form to request more information.

\$\$50k-\$99k Bachelor's Degree or Higher 25-34 Female

The accelerated programs are definitely a plus. I have my masters and to see being able to pursue my doctorate within a reasonable timeline gives me hope.

≅ Bachelor's Degree or Higher **≅** 25–34 **Å** Female \$\$0–\$49k

I just really like this format of the thumbnails and the information that goes with them. It makes for a very streamlined presentation

Because I can get credit for experience instead of wasting time and money on classes not needed

\$\$50k-\$99k Associate's Degree 25–34 Female

It seems to be a simple process for me to find the right information for my needs.

All Incomes ∨

help 🕕

All Ages ∨

All Genders ∨

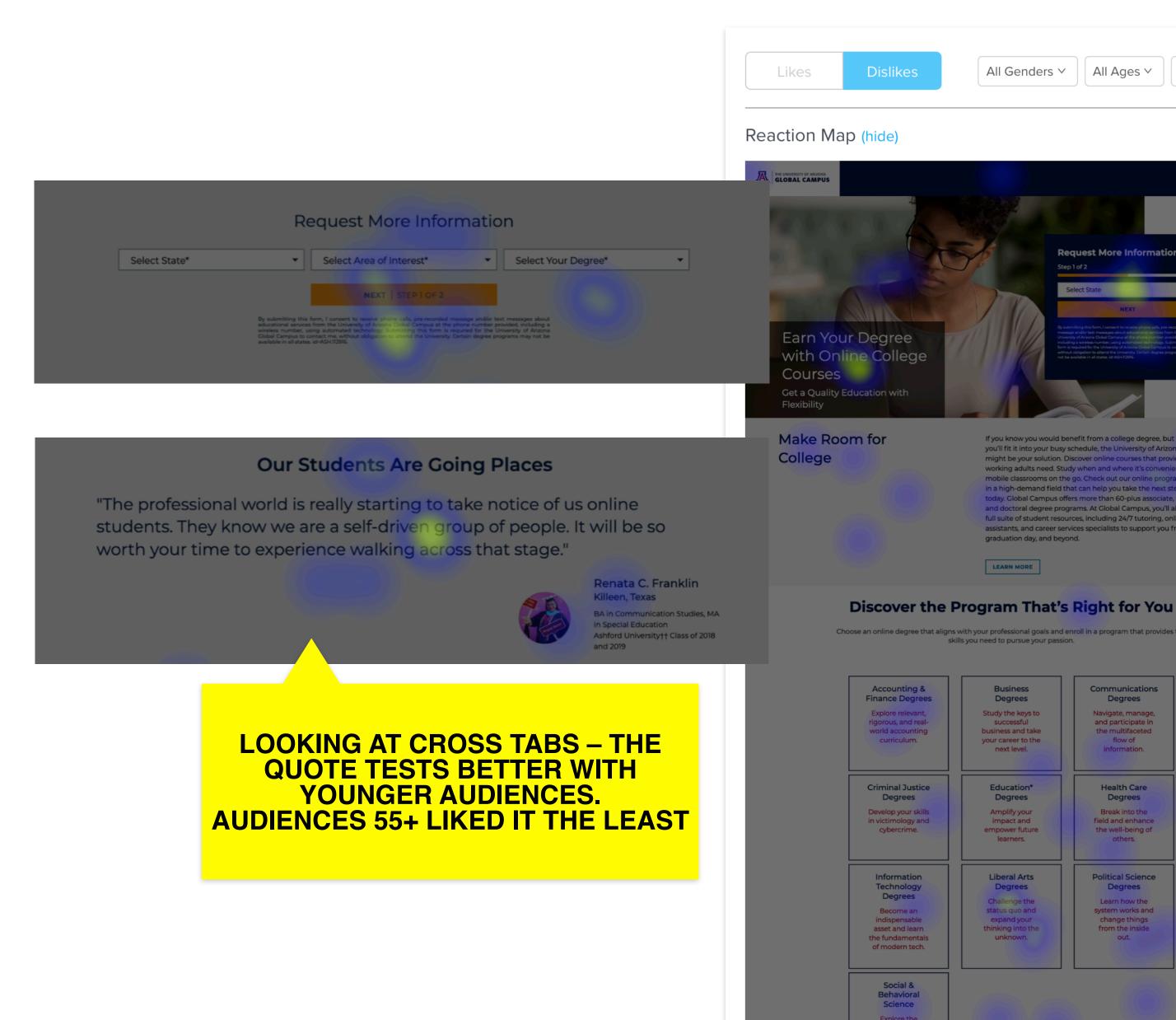
LEARN MORE

Dislikes

Users are asked a series of questions and click on the page and leave a comment.

Here, the "heat map" shows the positive comments.

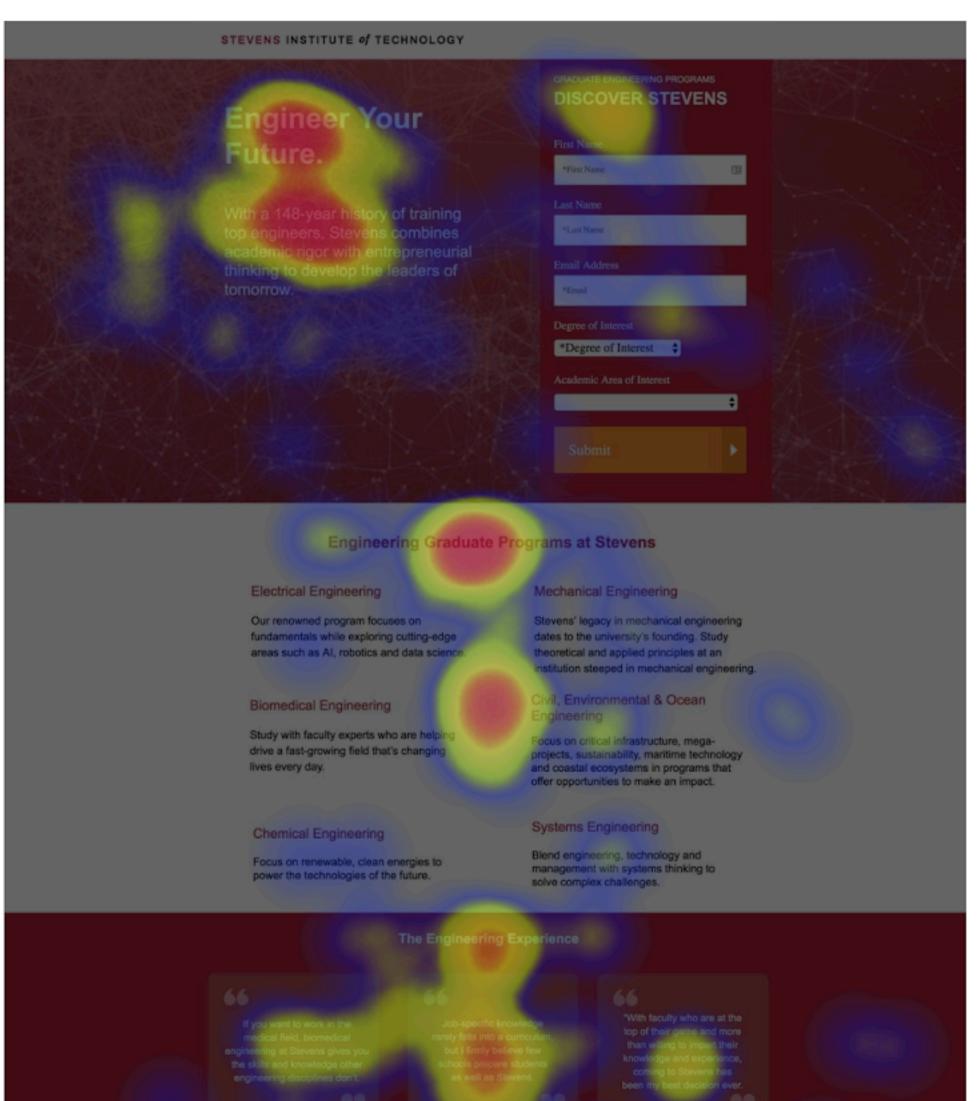
- Some negative reactions to "Make Room for College"
- Intro deck is too dense
- Testimonial did not test well
- Users did not react well to a second form on the page
- "Fine print" under the second RFI made users cautious





Reaction Map (hide)

help 🚯



Quotes

This is by far the most informative area of the web page. It gives me a taste of what I'd be studying which makes me want to read more.

This page lures me in. I love how it is so welcoming, but with no cheesy photos.

I like the beginning page because it attracts the eye and the headline sticks out.

Because of its opening text grabs your attention and makes you want to know more about the school by signing up for it

It lists the majors available which seems like the main reason someone might visit the website. It also stands out because it breaks up the red color

This is probably the most practical feature of the page, and it also isn't particularly unappealing on an aesthetic level.

I like that right as you appear on the page, you get a little blurb of what Stevens Institute is about

Female ⊞ 18–24

Dislikes Likes

All Genders ∨

All Ages

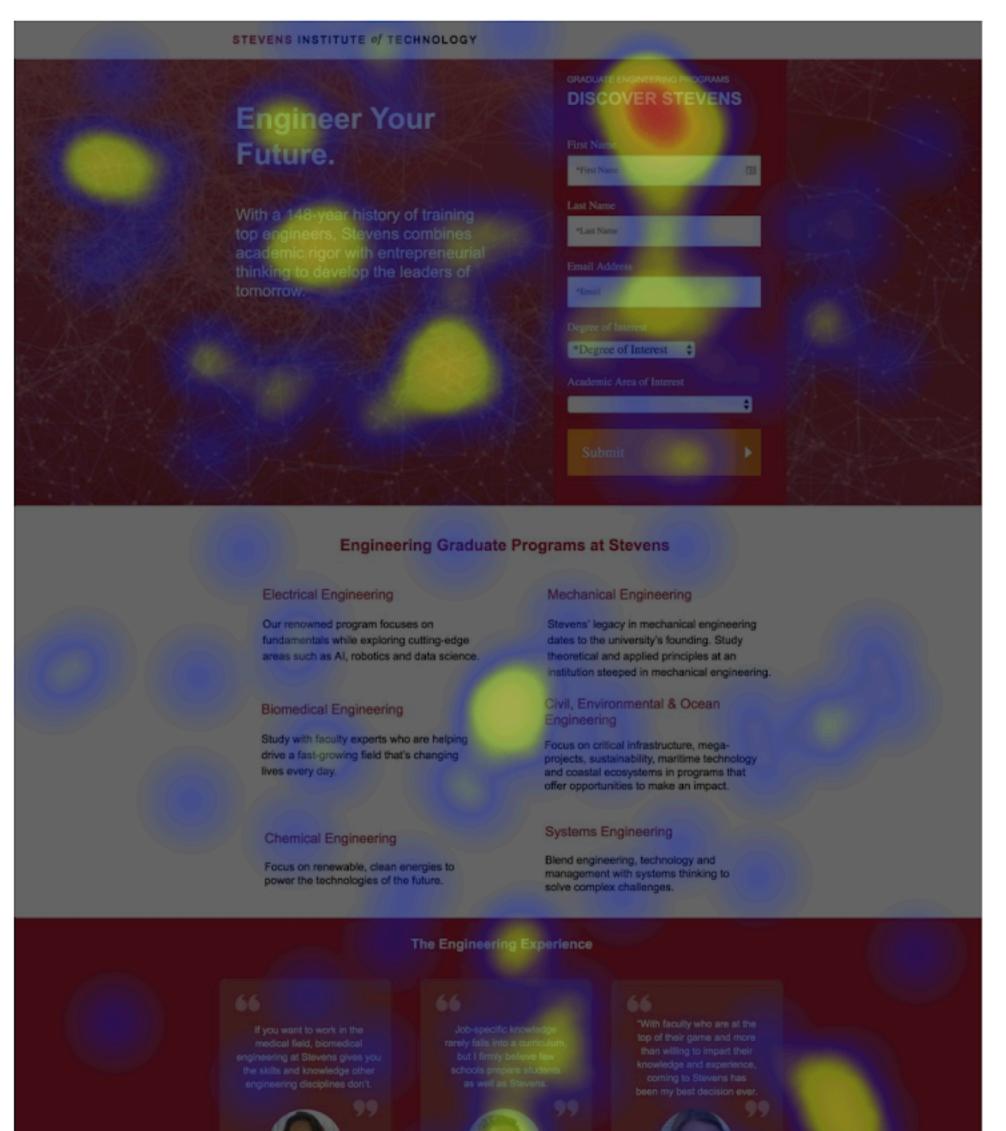
Search quotes...



Reaction Map (hide)

help 🚯





Quotes

The sign in button is the first thing you should see when opening the web page instead of it being beside the quote

There feels like there should be a menu bar or something else here, otherwise the page feels short and it seems like there isn't any more information to give

The sign-up is pushed in your face off the bat, use that space to add some info, or links directing people who are interested in learning more. Add the sign up at the top of the page in a link as well, people should want to find it.

Male ≡ 18-24

Usually there is a way to contact the school at the bottom of the page, but there isn't anything here

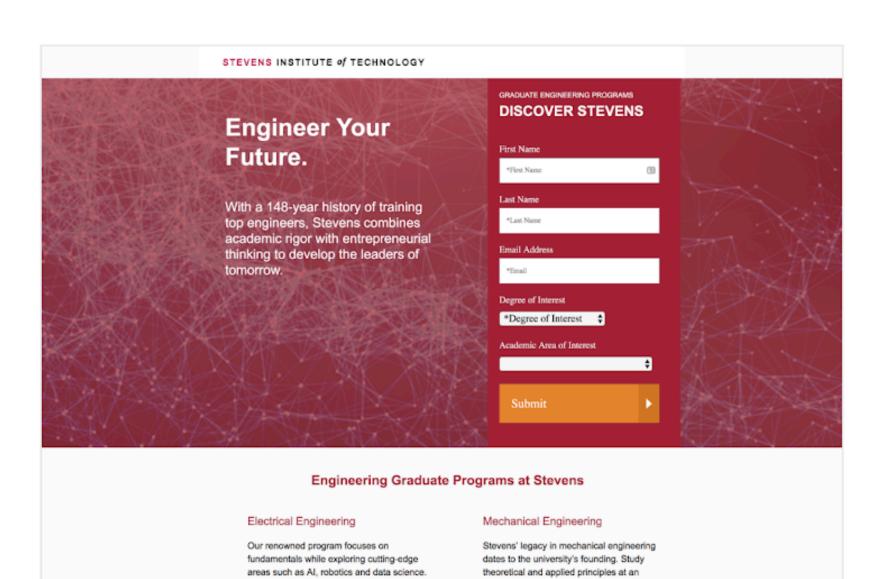
I think more testimonial from different program would improve the page

Not the most professional picture. I think the other ones are better because they seem real but not too 'selfie' like the last one

♣ Female 🖽 18–24

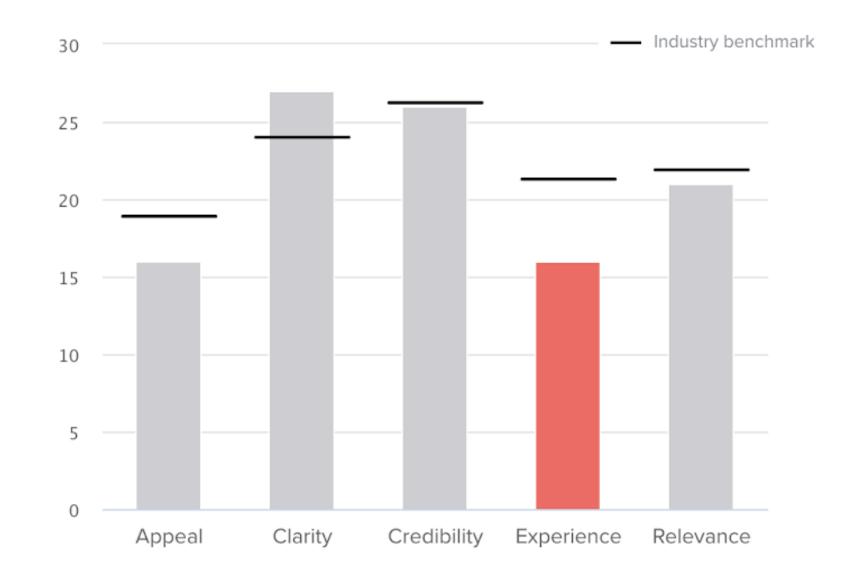
This should be at the bottom of the page or on another "contact us/questions" pade

screencapture-tech-stevens-edu-grad-engineering-2019-05-24-1...



Driver Scores





All	Appeal	Clarity	Credibility	У	Experience	Relevance	
Search quotes					Q	Filter Quotes	
Quote			Gender \$	Age \$	Sentiment \$	Gender	
The colors used were engaging the interest of someone who is		rs or bright colors, which keeps	Female	18–24	Good Experience	✓ Female ✓ Male	
There is not a lot going on ther learn more	e is less ways for viewers to int	eract with the page and want to	Female	18–24	Poor Experience	iii Age ✓ 18–24 ✓ 25–34	
The color red is a great choice	. Also the network pattern at the	e top of the page.	Female	18–24	Good Experience	 ✓ 35–44✓ 45–54✓ 55+	
It has a great layout to make th	e page pop out to the person t	nat is reading it.	Male	18–24	Good Experience	Sentiment ✓ Positive	



Prepare & Present Your Findings



Preparing Your Findings

- Let the users speak
- Mix of qualitative and quantitative
- Count number of times a topic came up
- Watch out for bias confirmation
- Reading transcripts can be helpful
- Word clouds
- Color scoring emotional test
- Preference graphs



Personas

Persona



Susie Socializer

"I want to take full advantage of the opportunities Ole Miss provides for social engagement. I'm a serious student, but I really enjoy The Grove, Greek Life, cheering our teams on and the social events on campus."

DEMOGRAPHICS



2 17 yrs old (As Prospect)



3 US Citizen



Outside Mississippi



Upper Middle Class



Susie's first awareness of Ole Miss was from its sports teams or from her parents - if she is a legacy student. She put the school in her top five when she read that it offered both a high-quality education and a great social environment. When she started, she wasn't sure of her major. But Ole Miss had a broad enough range of programs she knew they would have something for her. When she toured the campus, she was struck by the beauty of Oxford, Greek life, welcoming attitude, and social opportunities. Because she hadn't chosen a major, she was less concerned about career outcomes.

TECHNICAL ABILITY









MEDIA PREFERENCES





DEVICE USAGE FOR RESEARCH









WORDS TO DESCRIBE ME

Suburban

Legacy

Fashionable Privileged Upper Class

Middle Class **Greek Life**

Social **Exurban** Fun White Aware

Smart



GOALS & NEEDS

- I need the traditional 4-year undergraduate on-campus experience.
- A university with a strong academic reputation.

OHO

- A school with a great social environment.
- A school that would allow me to find a group of students that will be my best friends.
- A school that will help me explore my abilities and reach my full potential.
- A school that will set me up for success.



PAIN POINTS

- Cost I will have to pay out-of-state tuition to attend. Are there any scholarships for me?
- The **loan load** I will have to bear after graduation. How do other people pull this off?
- Being away from home for the first time. Will the **dorm** and **food** be okay?
- It was expensive to travel all to Oxford to **tour** the school. Couldn't there be a better way to tour virtually?



INFLUENCERS

- College Confidential and other reviewers indicated that Ole Miss would be a fun experience.
- Ranking Services Ole Miss is regarded highly by a number of different rating and ranking services.
- The Website I don't know how much it will really cost to attend - the website doesn't help.
- The Website What is the campus experience like? I can't tell from the website. I need videos and photos of the dorms, cafeterias, fitness facilities with testimonials from students.



Journey Maps

Journey



ACTIONS

FEELING

Susie / Socializer

"I want to take full advantage of the opportunities Ole Miss provides for social engagement."



1. Brainstorm Future

As Susie starts thinking seriously about college, she begins to use online services (USNews, etc.) and tools to research her options. She also becomes aware of Colleges' national media campaigns particularly videos during nationally televised sporting events.

2. Visit Ole Miss Website

Susie visits the Ole Miss website for the first time to check if it meets the expectations set by what she has researched. She expects a great, vibrant, and exciting experience on the homepage and then she wants to see the majors/minors, and how much it will cost.

3. Visit Campus

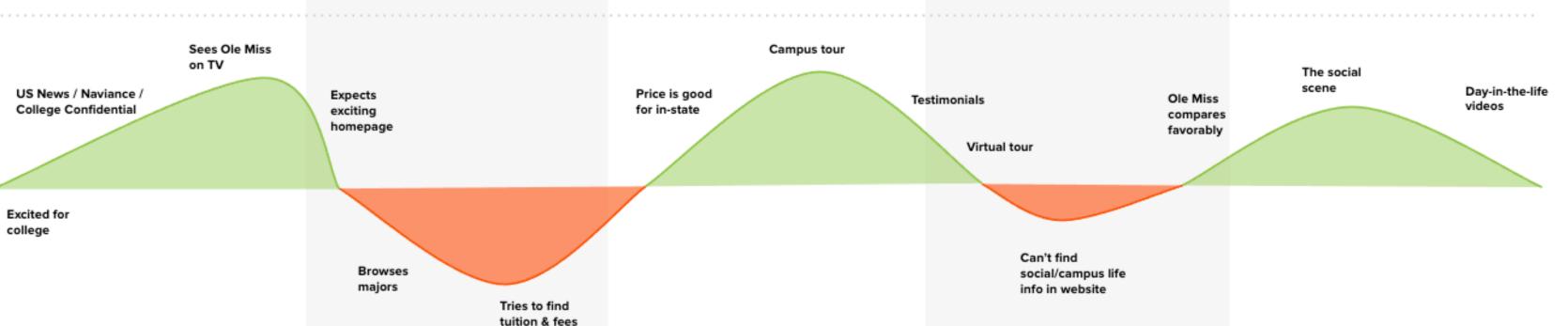
Susie's visit to campus is fantastic. She loves how welcoming and friendly everyone is. The guide connects with her and she gets candid answers to her questions about what the actual college experience is. She loves Oxford and the campus is beautiful and the Greek chapters look popular.

4. Compare & Contrast

Susie has created a spreadsheet she uses to compare and contrast her top college options. These include programs, tuition & fees, average expenses, campus life, outcomes, social life, student groups, food, campus, safety, distance from home, etc.

5. Social Media

Susie decides to visit the school's social media pages to see what is "really happening" on campus. She visits Instagram as well as Facebook. She doesn't want to see scholarly news and faculty announcements. She wants to see fun activities on campus and day-in-the-life testimonials/videos.







Penetrate / Optimize National Media Channels

- · Ensure that the statistics online services use for Ole Miss are accurate and any negative criticism found on third-party apps is address and responded to.
- Make sure the video Ole Miss uses to advertise the school during commercials is on brand and appealing to both students & parents.

Optimize Website Experience

- Ensure that homepage uses graphics/video to show Ole Miss as an exciting, vibrant, and prestigious school.
- Consolidate the major/minor pages into one page of record for
- Address usability issues across the website to ensure quick access to highly desired content.



Improve Virtual Tour / Add

Campus Life Graphics

- Continue Ole Miss's great work with prospect tours.
- Ensure that both the social and academic aspects of the school come through loud and clear.
- Include student testimonials throughout high-traffic page flows.
- Make sure the video on the virtual tours is operational. (It currently is broken.)



Make Comparison Info Easy / Include Testimonials & Groups

- Once she finds the info she is looking for - this is difficult compared to other websites! - Ole Miss looks good on paper.
- Make the information she needs for her comparison as easy as possible to find on the website.
- Include testimonials from students like Susie explaining their rationale for attending Ole Miss.



Make Social Media Personal

- · Ole Miss's social pages are vibrant and exciting. Make sure that pages aimed at prospective students show the exciting campus experience and include posts written by current students.
- Day-in-the-life videos are very popular with prospective students. Make sure they are features across social channels.



5 Benefits of User Research

- Make your website better.
- Learn more about your users and audience.
- Learn about your misconceptions and biases.
- Back up your decisions with data.
- Break through politics.



"Want users to fall in love with your designs? Fall in love with your users."

Dana Chisnell