User research course

Module 1: Why do user research?



Course outline

Module 1 - Why do user research?

Monday 6 March, online

Module 2 - Evaluative research

Tuesday 7 March, online

Module 3 – Other types of user research

Wednesday 8 March, online

Module 4 - Putting it all together

Friday 10 March, Iasi



Why do user research?

Before we discuss <u>how</u> to do user research, let's talk about <u>why</u>.



Agenda: module 1

- 1. A little bit about me
- 2. User-centred design and user research
- 3. How insight drives innovation
- 4. The main research methodologies
- 5. Hands-on: How could a previous project have included user research?
- 6. The cost of doing user research and not doing it!
- 7. Case studies how user research has enhanced the user experience
- 8. Building a user research team and capability
- 9. Hands-on: Add research to that project!



A little bit about me

I promise!





A little bit about me



- Before 2000, I was a producer, designer and developer creating CD-ROMs, websites and kiosks for clients such as Disney and Marks & Spencer.
- In 2000, I got my first **user experience design** role at Agency.com we called ourselves information architects.
- For our client British Airways, I redesigned their **flight booking engine** and observed while the designs went through user research I was hooked!
- From 2007, I held team leadership roles, which included a stint at **Endava** from 2016-2019. I didn't get many opportunities to do hands-on design, but always managed to keep my user research skills fresh.
- In 2019, I decided to become a contractor and formed **Vitamin J**. Since then, I've been working mostly for the **U.K. government**.
- I'm a mentor on the **UXPA scheme**, helping people get their first job in UX.



My approach to this course

- I'd love you to come away from this course eager to get started with **user research** by getting involved yourself, including it in your planning, or hiring user researchers to add to your teams.
- I won't be talking all the time, because I believe that the best way to learn is **by doing**. Each of the first three (online) modules has **practical tasks**, and the final module in lasi will be mostly a chance for you to put your new knowledge into practice.
- The case studies dotted around the course are all projects that I've worked on. These are a
 mixture of Endava projects which you may be familiar with and other projects, to give you
 a flavour of how things can be done differently.
- I'm happy to **answer questions** at any time, but I'll stop at the end of each section and ask if there are any before we move on.



Please introduce yourself...

- It would be really useful for us all to know who is in the audience.
- Please can you introduce yourself in the chat, letting everyone know:
 - Your name
 - Where you're based
 - What you'd like to **learn** from this course.
- I'll do my best to cover most of what you request!



As Frank Sinatra sang:
"You can't have one without the other"





What is user-centred design?

User-centred design
(UCD) is an iterative
approach to developing
new solutions to
problems... The process
begins with human
beings and ends with
solutions tailored to their
individual needs.

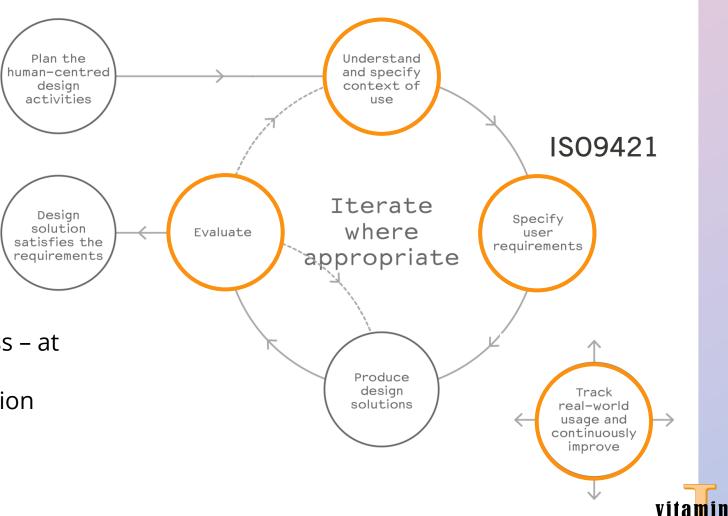
First you have to understand the **people** you're trying to reach, and then you begin designing from **their perspective**. UCD is all about empathising with the individuals you're designing for.

Then you've got to generate heaps of **ideas** and **prototypes** to test and **share your creations** with the people for whom you're designing. You'll inevitably fail and try again (this is where the iteration comes in) but with users at the centre of your design process, you'll eventually put your **innovative solution** out in the world.

Sergey Gladkiy, builtin.com, June 28, 2022

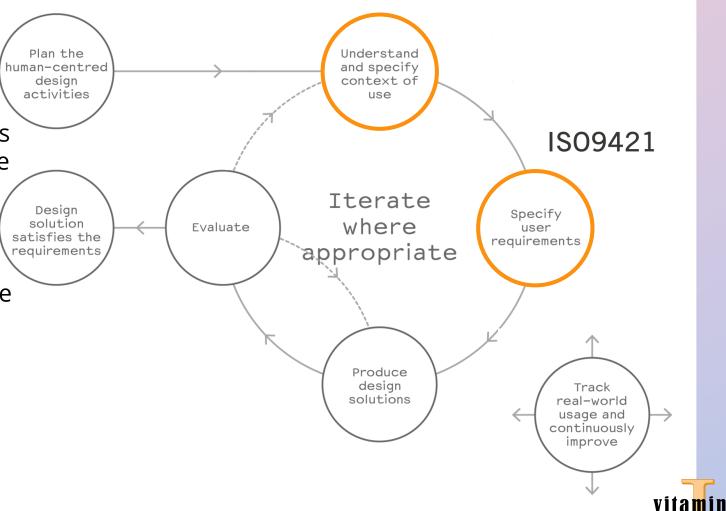


- User-centred design (UCD) is an iterative design process in which designers focus on the users and their needs in each phase of the design process.
- UCD is an international standard process that delivers superior user experiences.
- User research plays a crucial role at three key points of the UCD process – at the start, during the iterative design process, and after the product/solution has launched.



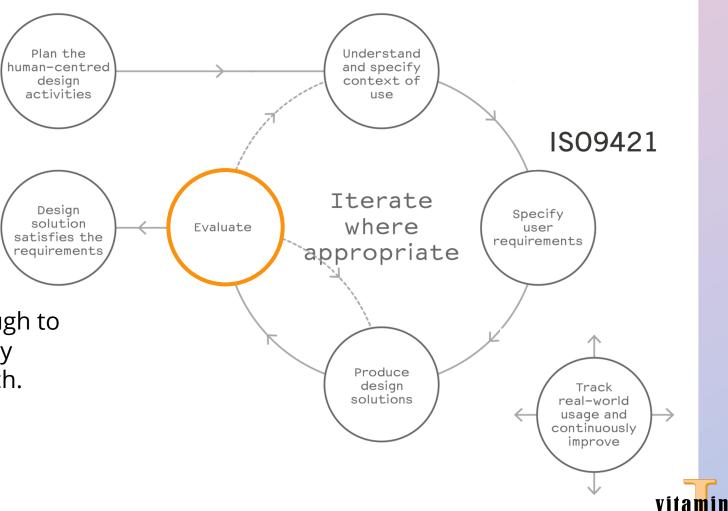
• At the start of a project, generative research tells us about the context of use – the time and environment in which users will be performing the task(s) that we are looking to assist them with.

 Generative research also tells us what the user requirements (needs) are – the task(s) that we hope our solution will help them with.

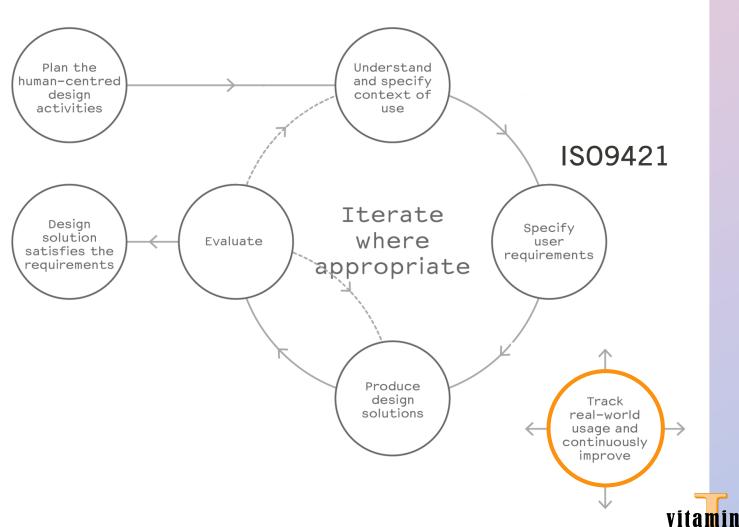


 As a design solution is developed, it is regularly **evaluated** in user research to check how well it is meeting user needs, and establish through user feedback what can be improved.

on **any fidelity** of design, so it often starts with little more than **sketches** and goes all the way through to **high-fidelity prototypes** that closely resemble the solution that will launch.



- Finally, after the solution has launched, the solution is **tracked**, to find out how people actually use it in the **real world**.
- User research is brought in to find out why the users might not be interacting with the solution in the way that was expected.
- This ensures that, after an MVP launch, the solution can go through a process of continuous optimisation.



What are the benefits of user-centred design?

- The **better** we understand our end users (or target audience) at the start, the **more in tune** with their needs our ideas will be.
- The user-centred design process includes **iterative design**, which aims to go on improving the our design solution until it closely **meets the user needs** that we have identified. This is a kind of built-in "automatic pilot" that helps us correct the direction of our design solution.
- This means that, when our solution **launches**, they are likely to be **better adopted** by the target audience.
- But it doesn't end there. Tracking the **real-world usage** against known user needs allows us to continuously improve our solution after launch.



So, ask yourself these questions...

Can we really say
that our design is
user-centred if we
don't do user
research?

How can we empathise with users if we don't talk to them?

How can we innovate if we don't conduct user research?



How insight drives innovation

"Nothing is more terrible than activity without insight"

Thomas Carlyle

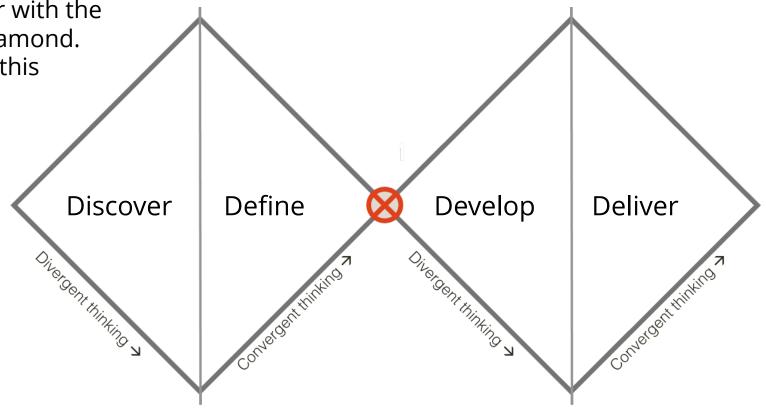




User research and the "Double Diamond"

 I'm sure that you are familiar with the Design Council's Double Diamond. They more formally refer to this as their "framework for innovation".

The two diamonds
 represent a process of
 exploring an issue more
 widely or deeply
 (divergent thinking) and
 then taking focused action
 (convergent thinking).





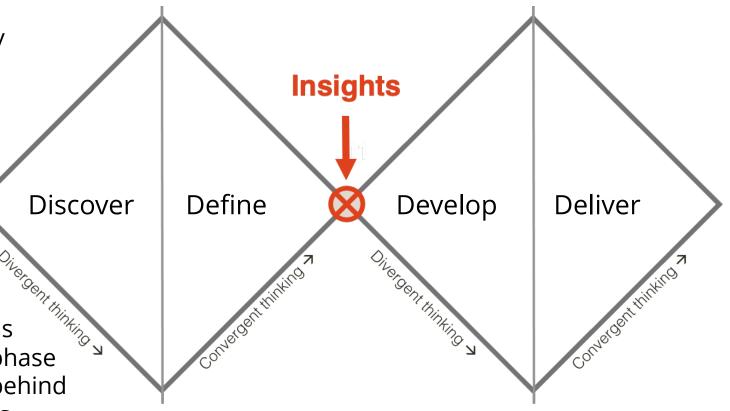
User research and the "Double Diamond"

 The first diamond helps people understand, rather than simply assume, what the problem is. It involves speaking to and spending time with people who are affected by the issues.

 This step cannot happen without generative user research in some form.

The **Discover** phase produces

 a mass of facts and observations
 that are distilled in the **Define** phase into kernels of truth - the **why** behind the **what**. We call these **insights**.





Outsights vs. insights



Outsights

Observation



The 'what'



Designs are cosmetic fixes



Tactical work

Insights

Understanding



The 'why'

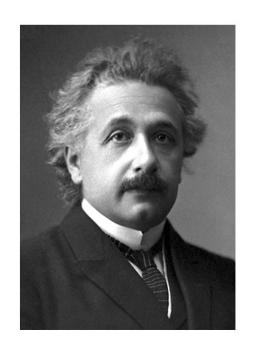


Identify new opportunities



Game-changing work





If I had an hour to solve a problem and my life depended on it, I would use the first 55 minutes determining the proper question to ask.

For, once I know the proper question, I could solve the problem in less than 5 minutes.

Albert Einstein

An insight changes the way that you see something.

Why do we need insights?

- Our success in creating great user experiences relies on the quality of insights that we work with.
- Meaningful insights give a much clearer design direction.
- When presenting to clients, insights about their own customers can translate into **nodding** heads in the boardroom.

Which is more **powerful**?

"We heard this from your customers and developed a concept which directly addresses that need".

...or...

"We thought this concept was really cool – no-one has done this before".



The main research methodologies

Your user research palette



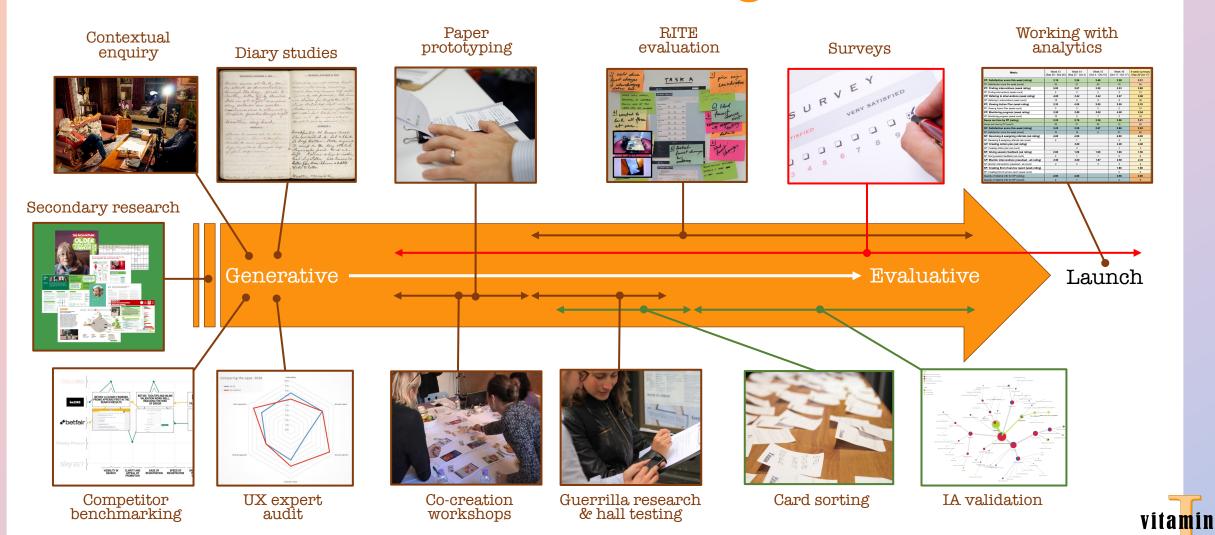


The main research methodologies

- All user research methodologies lie somewhere on the spectrum between generative and evaluative research.
- We will concentrate on evaluative research in module 2 and other methodologies in module 3.



The main research methodologies



Generative research

At the start of a project, we use **generative** (also known as formative) research methodologies to find out about the needs of the target audience and the context in which they will use the digital product we'll be designing.

- To gain the best insights that will lead to innovative solutions, we conduct **ethnographic** research.
- When our clients already have a large amount of research into the audience's needs and behaviours, we conduct **secondary** research, drawing out the insights that are relevant to the project.
- To gauge the strengths and weaknesses of existing competitive products, and learn where the untapped opportunities lie for our client, we conduct **competitive** landscape research.



Endava // Consumer Insights playbook // © Copyright 2018 Endava // Confidential and Proprietary // Version 1.0

points.

Evaluative research

We use both **face-to-face** and **online evaluative** research methodologies. Because research usually has to fit within a two-week **agile sprint cycle**, we tend to favour methodologies that can deliver good, consistent user feedback in a short timeframe.

- We conduct face-to-face RITE (rapid iterative testing and evaluation) research on stimulus ranging from paper sketches to high-fidelity prototypes. This can be conducted anywhere, thanks to our mobile research laboratory.
- We also use a variety of **online evaluation** tools to validate all aspects of our designs, from information architecture to brand adherence.



Co-creation: Lipton tea for Unilever

The purpose of this project for Unilever was to rapidly develop and validate some "back of an envelope" concepts for mobile apps, and gauge which were most likely to be popular with an audience of tea drinkers.

We held two **co-creation workshops** in which tea drinkers were shown some mobile apps that were designed to help them get the most out of a tea break. The concepts were prioritised and the most popular built upon with help from the participants.

This meant that, after a week of design and research activity, we were able to identify a clear winner and 2 runners-up from the 8 original concepts and develop them into early design prototypes.

Creating the right mood

To make sure that our participants felt at ease and ready to talk about the subject of tea, we furnished our meeting room as a tea room, complete with trolley and tea cosy.







Voting with play money

Participants were given £1,500 to vote for their favourite concepts(s)

Development of concepts

Starting from a text description, we developed 8 home screens for the first focus group and then 3 prototypes of the most popular concepts for the second focus group.



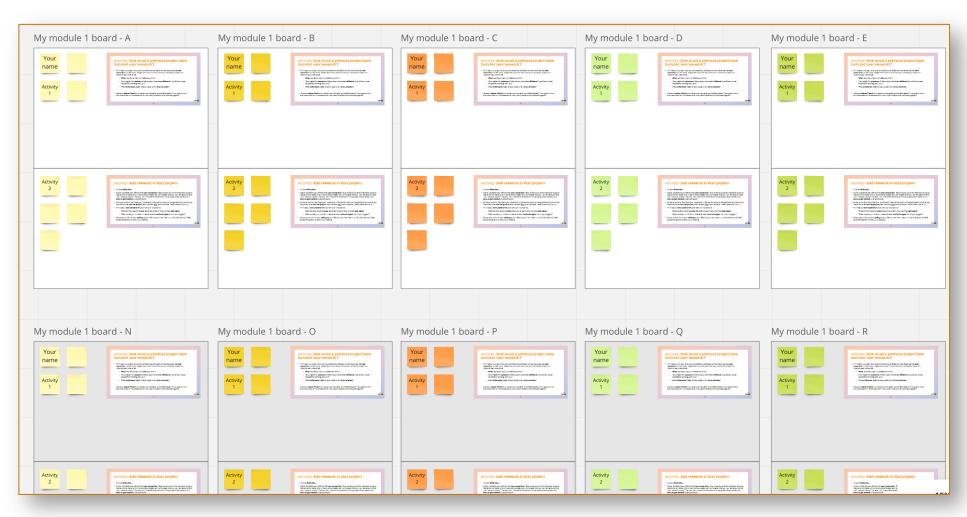


Activity: How could a previous project have included user research?

- Think about a project that you've worked on at Endava where there was no user researcher on the team. Maybe the research was done by a third party, maybe no research was done at all.
 - What was the project and who was it for?
 - How might the **outcome** of the project have been **different** if you'd had a user researcher working with you?
 - What difference might it have made to the final solution?
- Choose a colour Post-It and leave your thoughts on the Miro board. Then grab a drink and come back in 10 minutes from now, when we'll look at the board together.



Please bag a space on the Miro board



bit.ly/vj1miro



The cost of doing user research...

...and not doing it!





THE ROI OF USER EXPERIENCE



Susan Weinschenk, Ph.D. Chief of UX Strategy, Americas Human Factors International



The cost of doing user research... and not doing it!

- More conversions
- More registrations
- Fewer abandons
- Fewer calls to the call centre
- Less training
- More usage/adoption
- Saving customer/staff time
- Saving development time
- Fewer errors

So the next time you see hesitation in your decision-makers' eyes on whether investing in UX Research is a good idea, ask them this: do they want to put all the work in creating something and hoping it will have value, or do they want first to know what that value is?

Yuliya Nikolova-Joubert The Business Value of UX Research



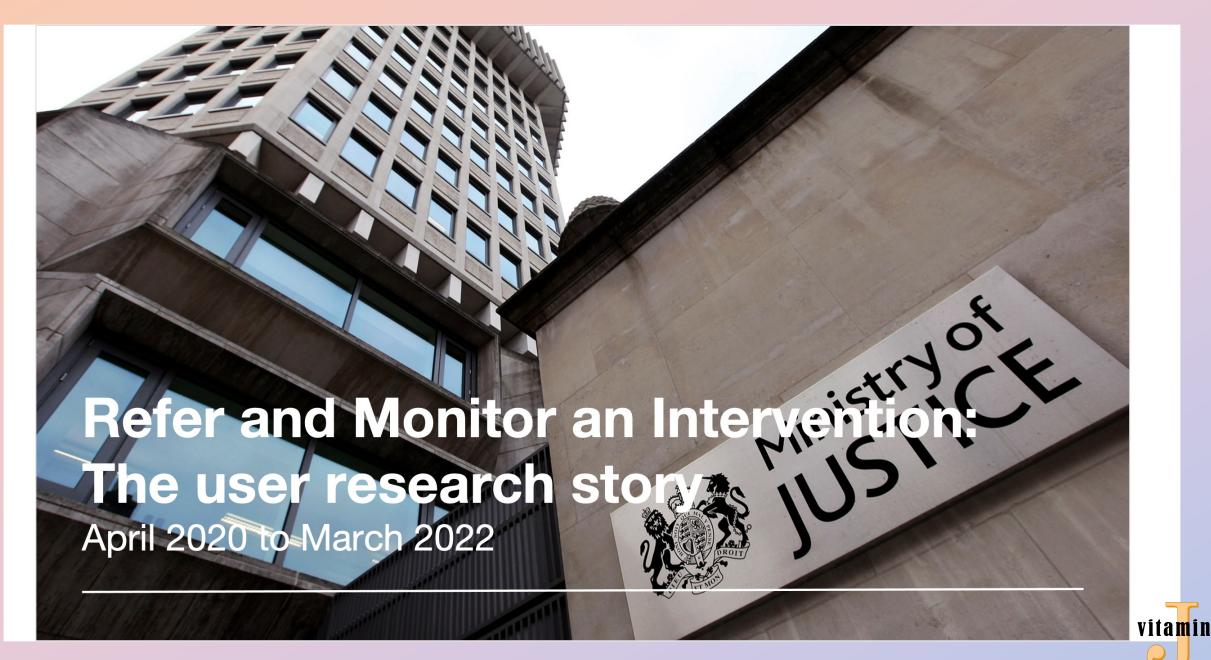
Case studies

Two examples of how user research has enhanced the user experience









Building a user research team and capability

The right people and the right backing





Building a user research team

- In an agency environment, where everyone is working on different client projects, it's typical to have **one user researcher** for **every three UX designers**.
- This doesn't mean that you need to satisfy this equation right away! A good starting point
 would be to recruit a senior user researcher with the mission to develop the practice in your
 office.
- If they can convince you that they're the **right person** to do that, then they can grow the team
 at the pace they (and the business) feel comfortable with. An experienced senior researcher
 should be best at **spotting talent.** So, once you've made that key hire, you can sit back and
 watch the team take shape.
- The best (and fastest) research is done in pairs, but provided your first hire can rely on support from other team members as note-takers, they should be able to make a positive start until a business case can be made for the next hire.



User research job spec: Example



UX Researcher

Location: Endava head office, 125 Old Broad Street, London EC2

Start Date: Q1 2019 Duration: Permanent Salary: £45,000-£55,000

Grade: SE

About Endava:

Endava is a leading European IT services organisation with nearly 5,000 staff. Headquartered in London, Endava has offices in the UK (London), Germany (Frankfurt), Netherlands (Amsterdam), USA (New York, Atlanta, New Jersey, Denver, Seattle), Colombia (Bogota, Medellín) Romania (Bucharest, Cluj and Iasi), Moldova (Chisinau), Serbia (Belgrade), Bulgaria (Sofia), Macedonia (Skopje), Denmark (Copenhagen), Argentina (Buenos Aires), Venezuela (Caracas), Uruguay (Montevideo), Brazil (Paraná), Argentina (Rosario).

Supporting the full software lifecycle, we design and build digital solutions for our clients in a variety of industry verticals. We speak our customers' language and our delivery is world class. Our solutions transform systems, platforms and processes for the world's leading brands in Capital Markets, Banking, Payments, Insurance, Media, Retail, Travel and Telecommunications.

About this role: As mid-level UX Researcher, you will run Consumer Insight projects for Endava's diverse portfolio of UK and international clients. You will draw on your broad UX and/or CX research experience in formative and evaluative research projects and deliver.



What to look for in a user research CV

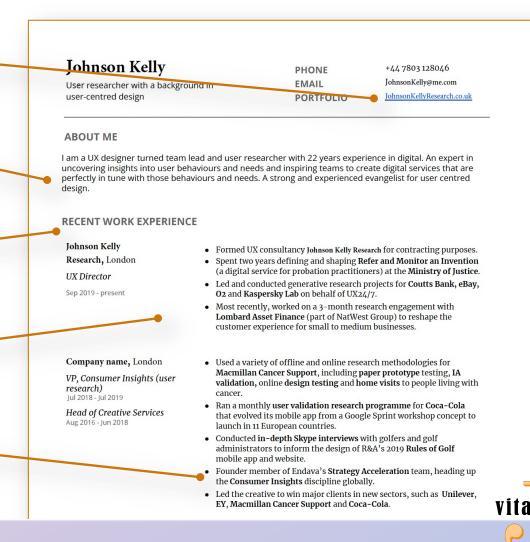
Most user researchers have some sort of <u>online</u> <u>portfolio</u> with case studies.

A strong, persuasive <u>personal statement</u> should give you an idea of where their passion lies.

Recent work experience should reveal a diversity of soft skills and methodologies.

User researchers need strong <u>organisational skills</u>, and this should reflect in a well-structured CV.

Achievements should be concisely written and impactful. This person has to be able to filter!



What to look for in a user research portfolio

It's a good sign if the candidate reveals their user research interests in a <u>blog</u>.

<u>Case studies</u> should be clear about the individual's input and how they helped the team.

Case studies should be well structured – for example, with STAR: Situation, Task, Action and Result.

Most of the case study should be the <u>Actions</u> that the candidate took and why that path was taken.

Results are frequently omitted because the user researcher hasn't taken the trouble to find out. \odot



Interviewing a user researcher

- Reviewing the CV and online portfolio (if there is one) should have convinced you that your interviewees are organised, experienced practitioners whose work produces excellent, measurable results.
- The interview is your chance to gauge whether they have the observational skills and ability
 to extract stunning insights that change the course of a project.
- In the interview, ask a user researcher to talk you through an end-to-end project in which their
 input was decisive for the final solution (rather than a project they're especially proud of).
 This should prompt them to speak about those insights and what they meant for the design
 team. You should get a feeling of close collaboration and the candidate should also talk about
 a variety of research methodologies.
- Are they **convincing**, **clear** and **concise** in their communication? It's important for a user researcher to be all of these things.



Questions to ask

- A good user researcher should have done their **homework** before the interview, so you could
 open with "What do you find exciting about this role at Endava"? It's a good sign if they have
 found out a few things about the company and if their interest has been piqued.
- For your first (senior) hire, the person who will get the ball rolling in your office, ask: "What would be your approach to building a user research capability here? Who would you need support from?". The person you hire won't be doing it alone, and hopefully their answer will acknowledge this and reveal a collaborative mindset.
- Any user researcher has to spend most of their time **asking questions**! So if you ask "do you have any questions for me?" and they dry up that's probably not a good sign!
- Above all, remember that to get the best of anything in life, you have to act quickly! I was
 always prepared to invite a promising candidate back for a second interview on the same
 day wherever possible.



Promoting UR internally and with the client

- Now that you've made that first user research hire, the task doesn't end there. It's just as important to **promote the new capability** internally as it is with the client.
- Endava has been established for a long time and some of the most senior sales and account
 management staff are used to working in a certain way. To make sure that project and pitch
 teams include user research, you will have to win these people over. What return will they get
 for the increase in budget due to that extra team member?
- Case studies can really help here. Your new user research lead will need to assemble a deck
 of Endava projects that demonstrate the return on investment and the increased quality
 and adoption of the solution. Once that's in place, they should never miss an opportunity
 to present it to colleagues and clients!
- Most people don't feel that comfortable presenting work that they were not involved in but over time, your user research lead will be able to swap in their own projects and really own the case studies deck.



Promoting UR internally: Example



CONSUMER INSIGHT

Who are we and what do we do?

We are:

Jonathan Culling, VP Consumer Insight - <u>jonathan.culling@endava.com</u>

David Riedy, UX Lead - <u>david.riedy@endava.com</u>

Leo Molloy, UX Researcher - joins Endava on 4 March.

What we do:

Consumer Insight is Endava's **research discipline**, and a key part of our user-centred design process. It is baked into our agile delivery flow and supplies data and insights to our UX and visual design methodology to drive innovation.

We provide **formative research** at the start of an engagement or project, which is key to understanding user needs and the client's context. This type of research includes:



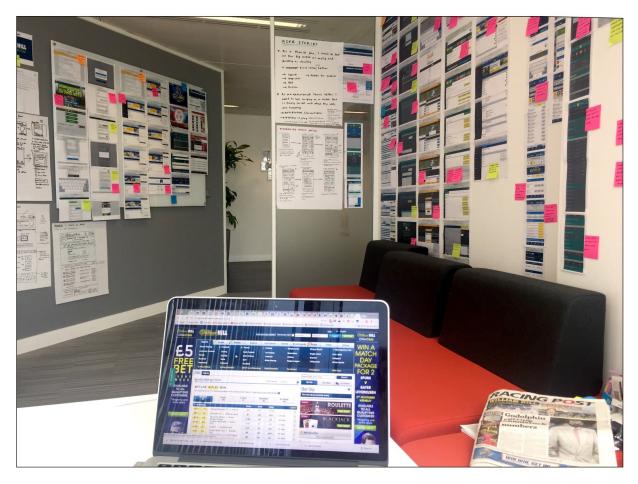


Design immersion rooms

At Endava, we love to immerse ourselves in the problem space by displaying our **inputs**, **inspiration** and **outputs** in a dedicated project room.

These rooms evolve over time into an invaluable project "museum" for **ramping up** new team members and **communicating our progress** to the wider client team in a visual, immersive way.

When spare meeting rooms are hard to come by, we can share progress virtually through **video showreels** and online **collaboration spaces**.



William Hill immersion room

For our proposal to UK bookmaker William Hill, we filled the Creative Studio walls with our competitive research, insights, sketches and finalised designs.

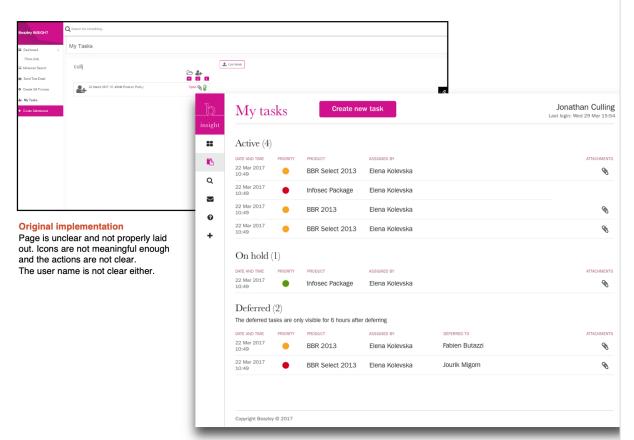


Validation research: Beazley Insight

Our Creative Services team was responsible for a large-scale overhaul of Beazley's underwriter portal, **Insight**.

After a thorough UX expert review, we recommended a new design language to add clarity, consistency and focus to each step of the clearance and underwriting process. We then worked together with the development team to make sure that our creative vision was realised.

To make sure that the system was as intuitive and usable as it could be at launch, we conducted a set of **1:1 user validation interviews** with users from the U.S. and U.K. Feedback from these sessions was incorporated into the final release.



Suggested design

There is more information and it is better organised and understandable at a glance. Priorities are self-explanatory (a label will be added as well, to tackle colour blindness)



How to make user research stick

- The tactics that I've just shown you worked well for winning over **individuals** at Endava, but it was never possible to win everyone over in this way.
- It would have really helped if there had been a **top-down announcement** about the new capability at Endava and how it would transform the way that we worked. I'm sure that this would also help you now, as you try to build a capability across the European offices.
- The new way of working, where it's accepted that a lot of user research can be done through
 video conferencing, should really help you here. It's no longer necessary to be in the same
 location as your client and their customers for evaluative research though it still helps a
 great deal in generative research.
- I hope by the end of this course that you will be convinced that user research is something
 that you will and can fully embrace, and that you can convince your leadership teams to give
 a ringing endorsement to this new capability.



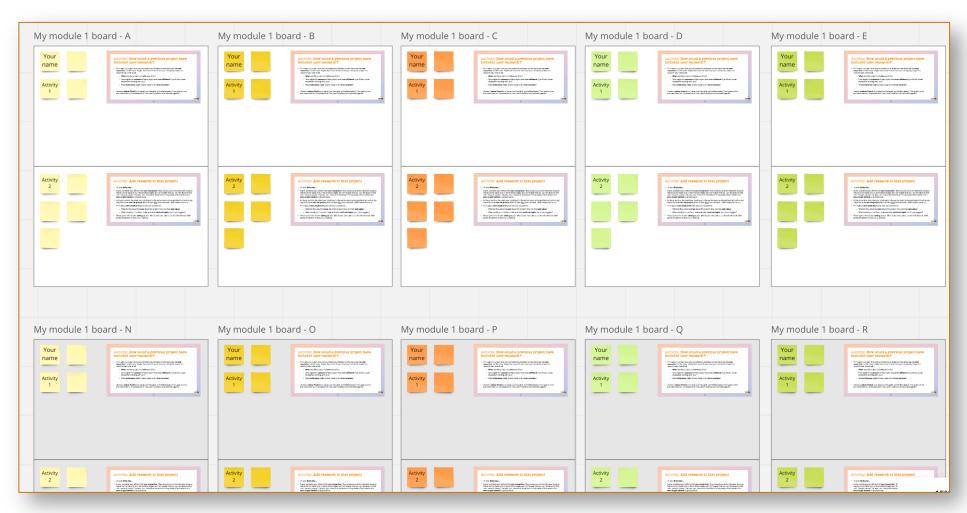


Activity: Add research to that project!

- It's your **lucky day...**
- You've just hired your office's first user researcher. They wowed you in the interview because
 they're comfortable with all the methodologies and techniques that you learned about in this
 user research course! The new user researcher started at the beginning of this week and is
 keen to get started on project work.
- At the same time, the client you mentioned in the earlier exercise has got back in touch to say they'd like to **re-run the project**, but this time <u>with</u> user research. Unbelievable, but true...
- Think about how you'd brief your new user researcher.
 - What do they need to know about the project, how can they add value?
 - What would you like them to do and what methodologies would you suggest?
- Please spend 10 minutes adding to your Miro board, then take a comfort/drink break. We'll
 get back together to discuss as a group.



Please go back to your space on the Miro board



bit.ly/vj1miro





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