User research course

Module 3: Other types of user research

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Course outline

Module 1 – Why do user research?

Monday 6 March, online

Module 2 – Evaluative research

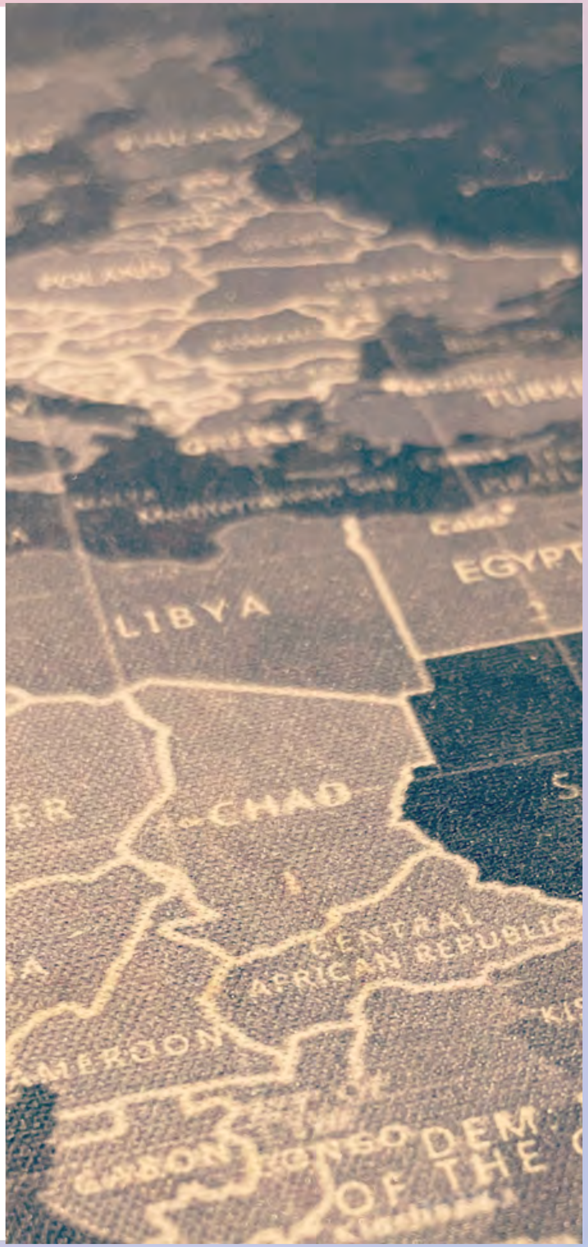
Tuesday 7 March, online

Module 3 – Other types of user research

Wednesday 8 March, online

Module 4 – Putting it all together

Friday 10 March, Iasi

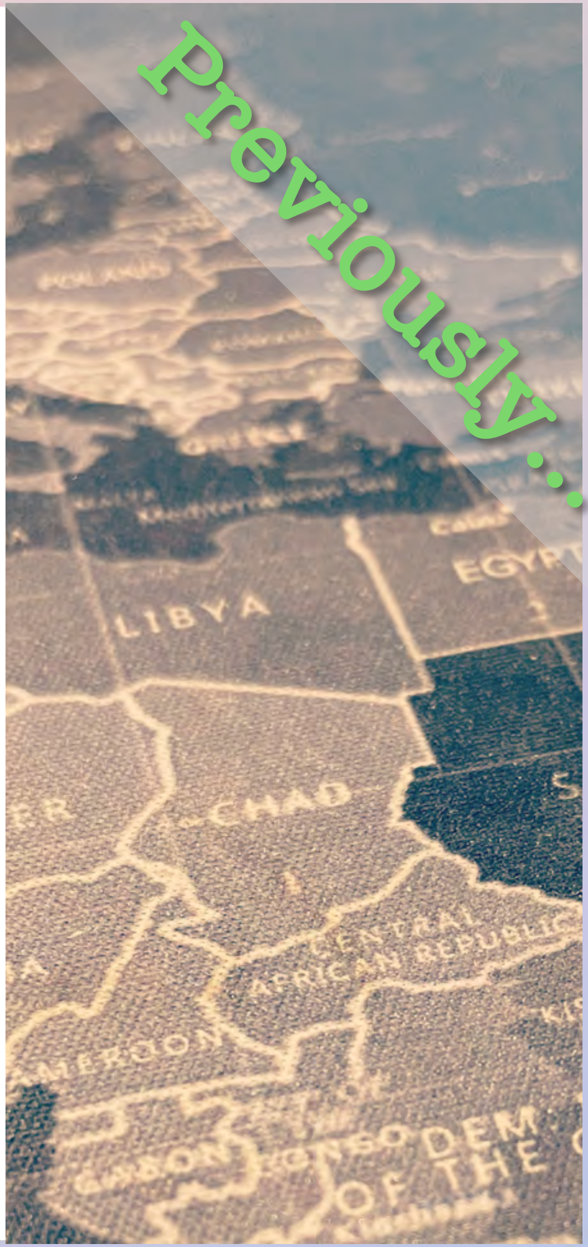


Previously…

G. Cabrera Infante
The Catcher in the Rye
JULIE BURCHILL
Fairweather
ORBIS
TOM PARKER
Asomi Ithia
Mastering the Role
Asomi Ithia
Journal
CHESLEY B. "SULLY" SULLENBERGER III
Secret Scripture
SEBASTIAN BARRY
Italo Calvino
PICADOR
LONDONER
PORTICO
THE LADYBIRD BOOK OF RED TAPE
French Short Stories 1
ADAM KAY
PICADOR
Treasure Island
Ken Robinson
German Short Stories 1
RACHEL BRIDGE
OF THE TIGER MOTHER
DAVID PEACE
Love in the Time of Cholera
EMMA
OXFORD
Love in the Time of Cholera
The Alternative Guide to the London Boroughs
KENT & SUSSEX
london cycling guide
TOM BOGDANOWICZ
MICROTRENDS
THE SMALL FORCES BEHIND TODAY'S BIG CHANGES
MARK PENN
WITH KINNEY ZALESNE
STRICTLY COME DANCING STEP-BY-STEP DANCE CLASS
National Trust Handbook
2022
JEAN GIONO
THE MAN WHO PLANTED TREES
THE LITTLE BOOK OF PLANTING TREES
LONDON FOR INSTAGRAMMERS
101 Sonnets edited by Don Paterson
The London Encyclopædia
Edited by Ben Weinreb and Christopher Hibbert
RUNNING THE SHOW
DAVID DOCHERTY
parenting made difficult phil hogan
mindgym
wake your mind up
CAROL KENNEDY
UX Strategy
Pooley & Lomax
REAL CIDERMAKING ON A SMALL SCALE
MICHELIN
ITALY
COLLINS ENGLISH THESAURUS
THESAURUS
Roget's Thesaurus
Unforgettable places to see
THE PENGUIN DICTIONARY OF PSYCHOLOGY
Zimbabwe & Botswana
PARENTING teenagers

Agenda: module 2

1. Planning a round of evaluative research
2. Recruiting participants
3. Writing a discussion guide
4. Preparing a virtual whiteboard for note-taking
5. Hands-on: Getting ready for a round of research
6. Moderating research sessions
7. Analysing the data and extracting insights
8. Researching in pairs: Why this is best
9. Hands-on: Analysing a round of research
10. Presenting your findings



Today…

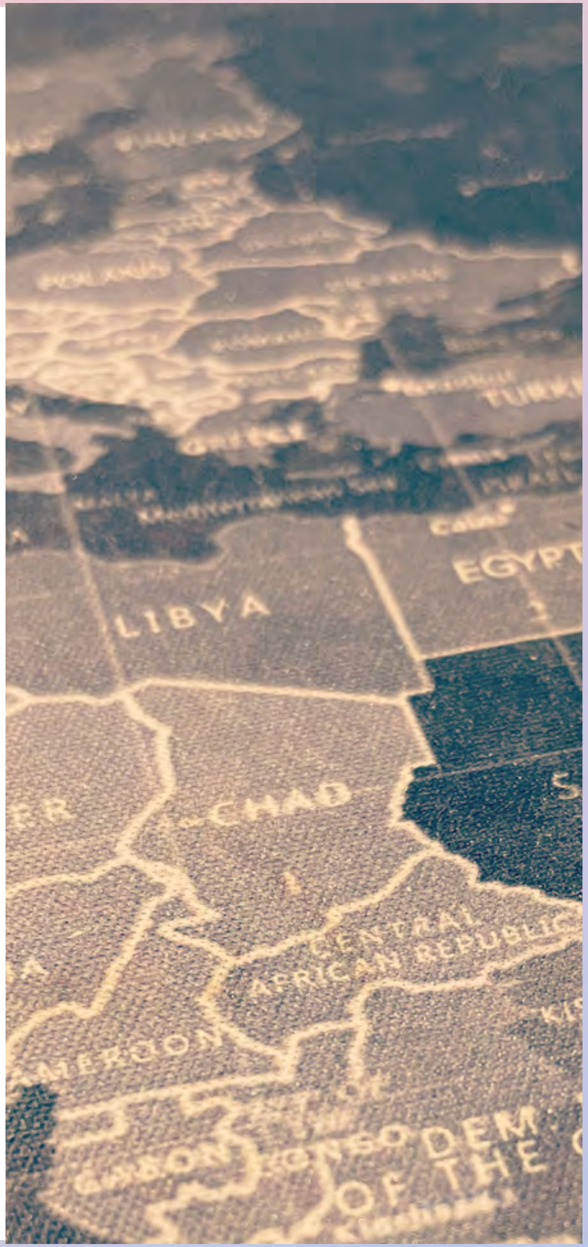
Other types of user research

Now that you're on your way to mastering evaluative research on prototypes, here are some other useful research methodologies.

From generative to evaluative, from qualitative to quantitative, from spontaneous to meticulously planned – there's a methodology for every occasion!

Agenda: module 3

1. Generative research methodologies
2. Personas and pen portraits
3. Documenting user needs
4. Guerrilla research and hall testing
5. Hands-on: Researching a target audience for a pitch
6. UX expert audits
7. Paper prototype testing
8. Quantitative research
9. Online tools for card sorting, IA testing and unmoderated research
10. Hands-on: Card sorting to find a user-centric IA
11. Working with analytics - a powerful combination

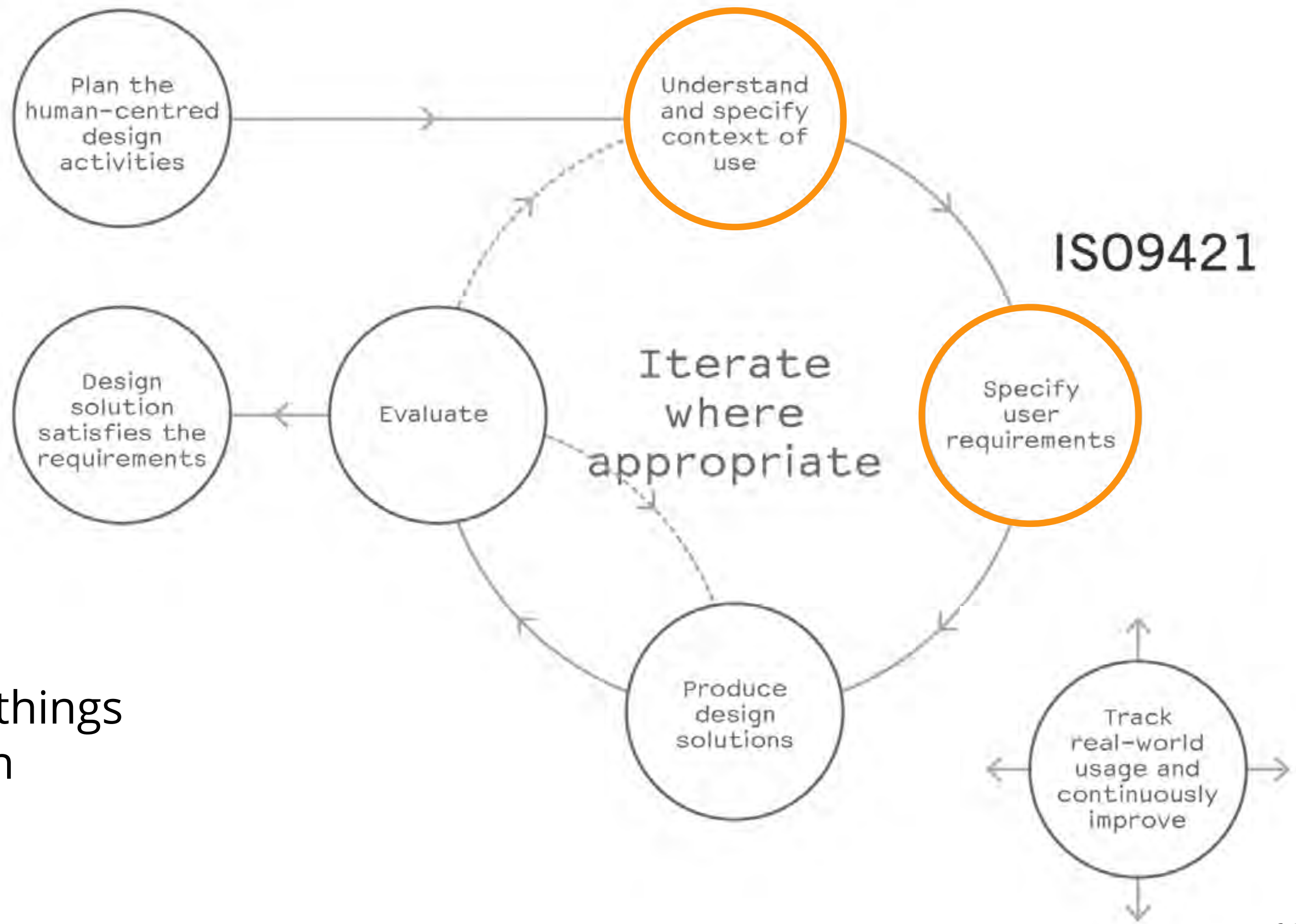


Generative research methodologies

Getting to know your users and what makes them tick.

Generative research

- **Generative research** (also known as formative research) is done at the start of a project.
- It's when you get to understand the **context** and **needs** of your users.
- The **insights** that you learn in generative research help the team to produce solutions that are in **perfectly in tune** with your target users.
- Because **insights** can help you see things differently, generative research is an essential aid to **innovation**.



Generative research: Why?

- Let's say that you are about to design an **app** or **website** that will help users with a process or task. Generative research can help you understand **how** they currently do it, and how digital can make the process more **efficient** or more **pleasurable**.
    - **Where** are they when they do it?
    - What kind of things to they **struggle** with?
    - Where do they currently go if they need **help**?
    - Are there any interesting **workarounds** that you can learn from?
    - Are there any **unnecessary steps** in the process?
    - Are there any **unmet** user needs?
- By examining the answers that different people give to these questions, you will gain useful insights about a **digital solution** could help.

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Generative research methodologies

There are a number of different generative research methodologies that you can use and each has its own **strengths** and **weaknesses**.

- **Secondary research** – Quite often, research will have already been done on a subject. This is a good starting point for any generative research, then you use other methods to fill the gaps.
- **Diary studies** – These are particularly useful when the subject matter of your study is personal or intimate. But they take 4-8 weeks to run, so they're not good for instant insight.
- **Contextual enquiry** (ethnographic research) – These are excellent when it's important to understand how people perform tasks. Typically, you will shadow your participants for a while then ask them to explain how they've behaved.
- Impromptu **user interviews** – This involves going to a place where your users hang out and asking if some of them are prepared to speak with you.
- **Competitor benchmarking** – When there are several (usually digital) services available, this is a structured way of comparing them and finding out what you can learn for your service.

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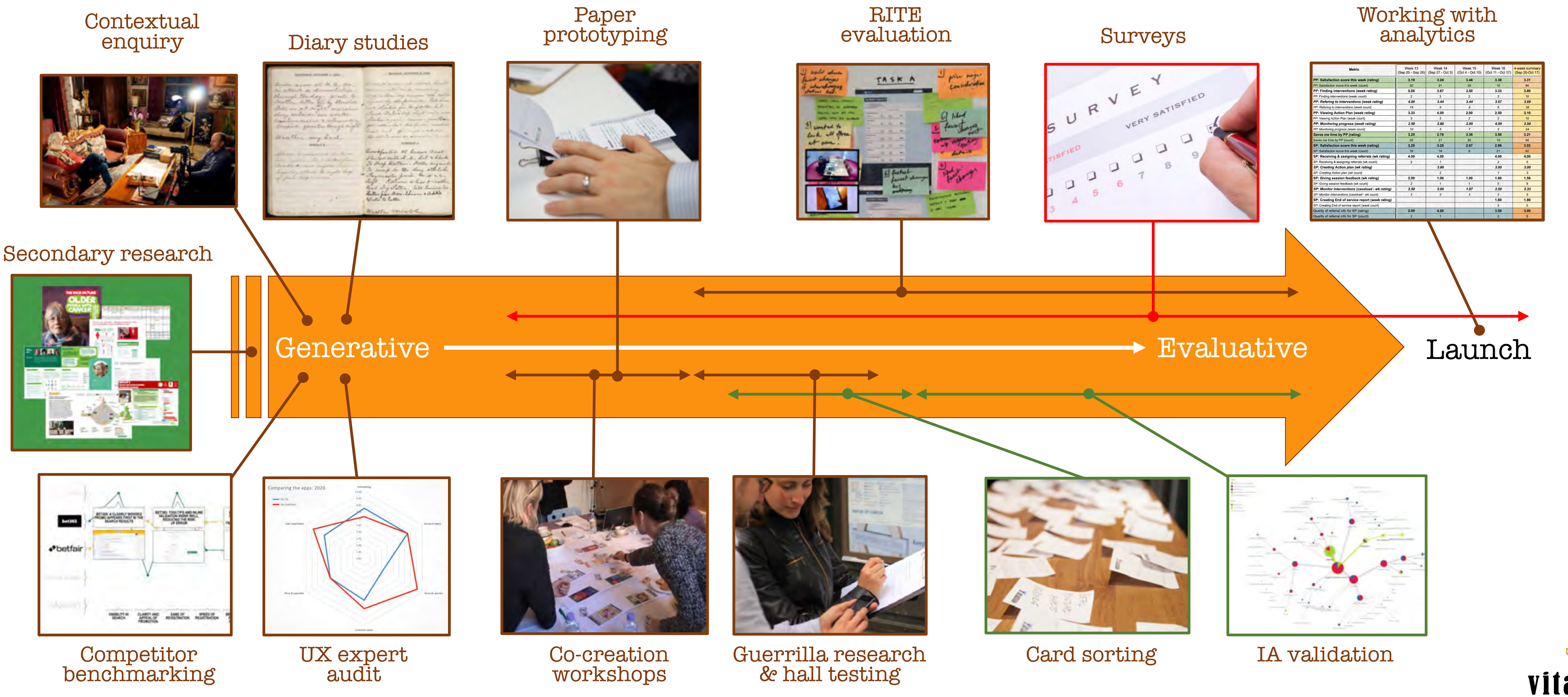
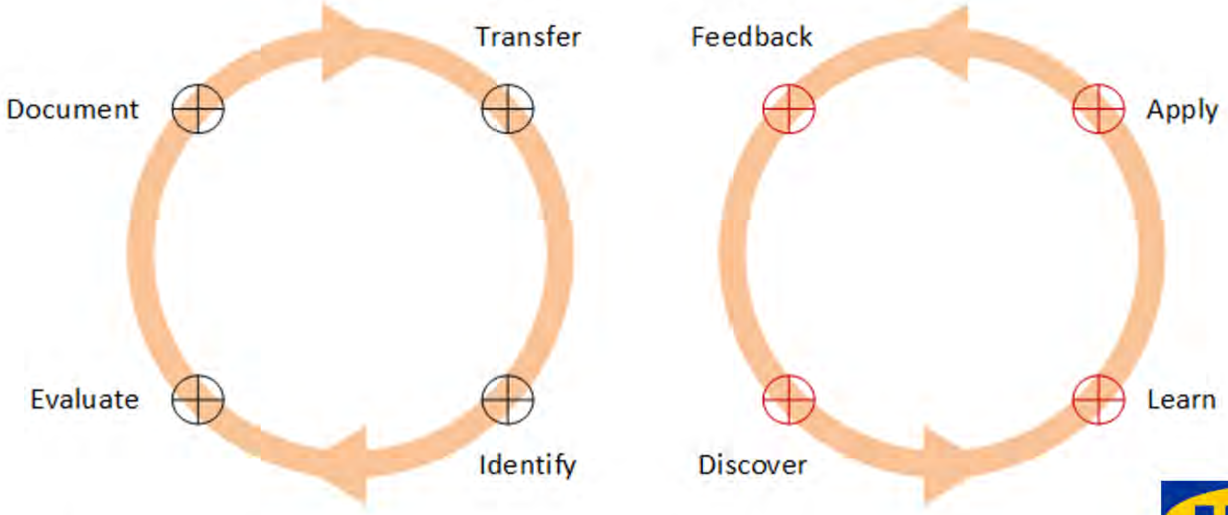
The main research methodologies



IKEA knowledge management

- IKEA stores look the same and are laid out the same all around the world. How do they do this?
- The answer is what they call **know-how**, which at the time was printed in large, expensive manuals. Although these worked well, they took years to produce and distribute, which meant IKEA could not innovate as fast as it wanted to.
- We visited stores in Europe, North America and Asia to conduct **ethnographic research** and found that:
    - Manuals were kept in **locked rooms** far from the place where the know-how was needed, which made it hard to apply the knowledge.
    - The way in which the knowledge was written **did not match** the way in which it was used.

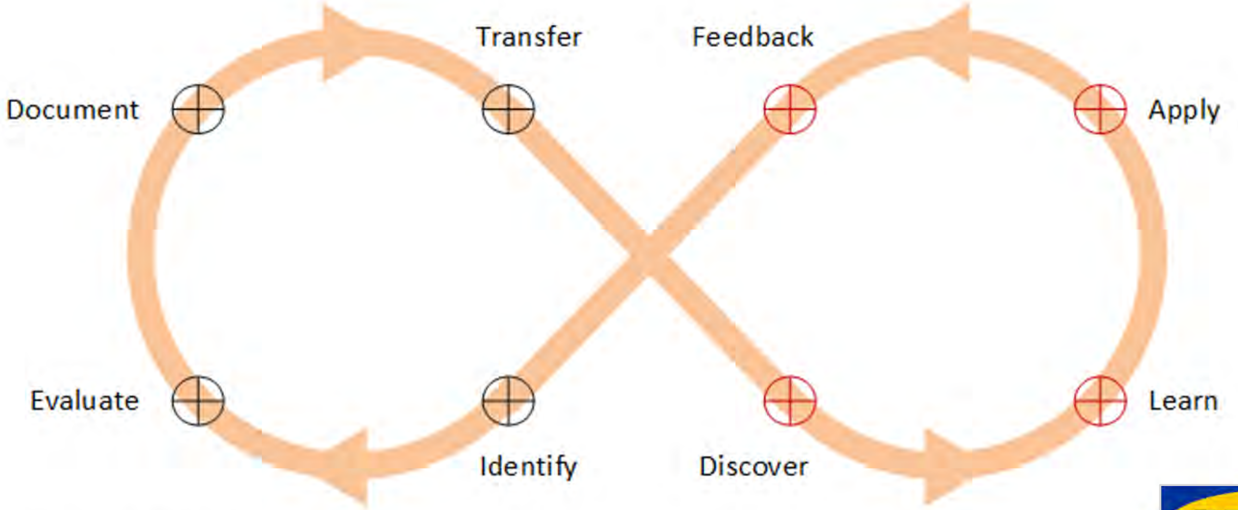
IKEA knowledge management



Content creation:
- Up to 3 years
- Large manuals
- Identified by store visits

Content use:
- Used daily
- Small items of 'know how'
- No direct input from store workers

IKEA knowledge management



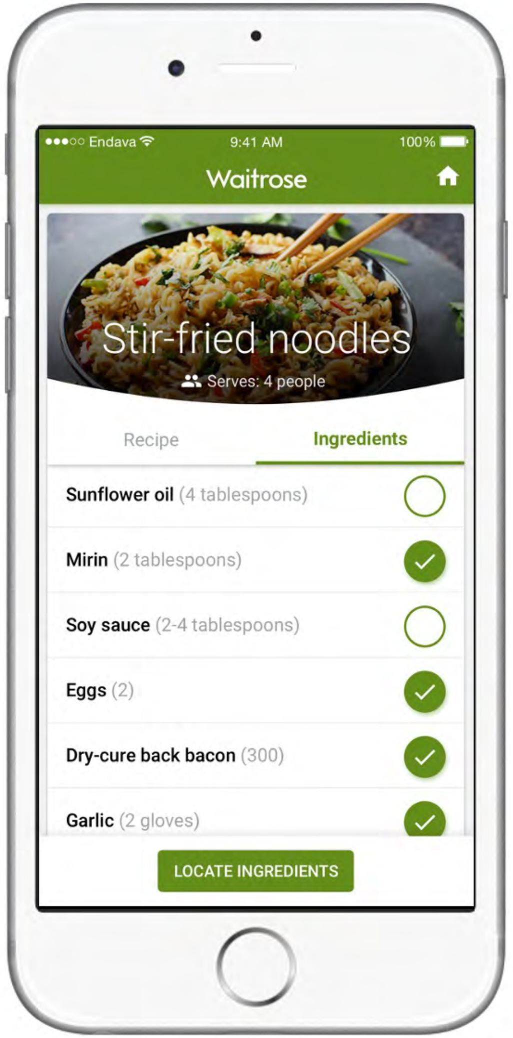
Solution:

- Content broken down into "atomic structure"
- Content produced and distributed when needed
- Direct feedback loop from users to content creators

Waitrose shopping app

- UK supermarket chain **Waitrose** challenged us to create a new mobile application supporting the two most common grocery shopping modes:
  - **Full weekly shop**
  - **Dinner for Tonight**
- We spoke to staff and customers in store and very soon found out that:
  - Customers liked coming **in store** to shop at Waitrose because they enjoyed the shopping experience and perks such as free newspapers and coffee.
  - They **did not want** this enjoyable experience to be taken away from them.
- This implied that the app needed to **enhance** the **in-store experience**, rather than replace it.

Waitrose shopping app



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Personas and pen portraits

“If life were only like this”…

Personas and pen portraits

- Once you've conducted your generative research, what comes **next**?
- In the context of a single project, you might **share your insights** with the rest of the team and they'll start to **produce concepts** based on those insights.
- However, you may want to document your understanding of users in a way that can span across **multiple projects**, or be used throughout a long project as a "**manual**" that the team can keep coming back to.
- This is where **personas** come in. They are rich documents that capture the characteristics of different sub-groups within your target audience. Referring to them can help you make sure that you always take their needs and behaviours into account when you design for them.
- **Pen portraits** are "light personas" – usually based on what the team and stakeholders already know about the target audience, rather than thorough research. These are still useful if you don't have personas!

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The power of personas

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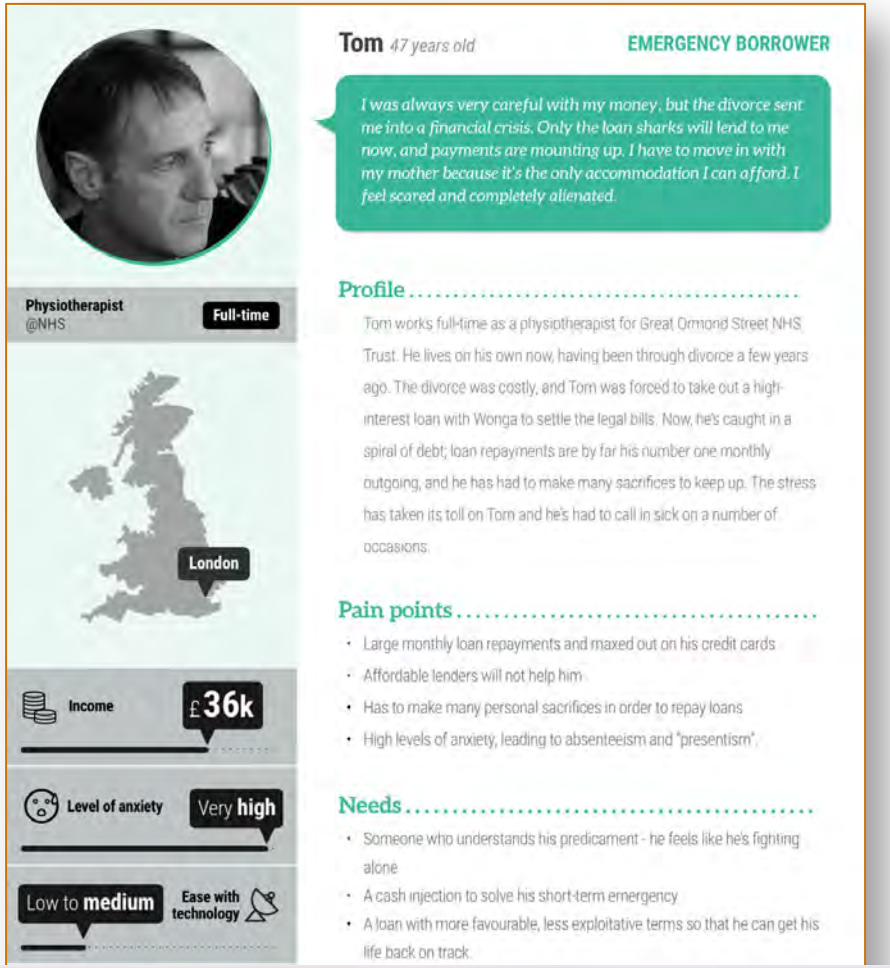
Example personas: Salad Finance



Name	Chas
User type	Ex-IDU (pre-2000, dependant)
Age	45
Job	Barman
Lives in	Leeds

NHS

What drives Chas to the site?

"I heard the radio ad and saw an ad in *The Sun*, but wasn't sure about going to the site – I don't surf the internet too much. But a friend encouraged me to have a look."

Wants to find out:

- What is hepatitis C and could I have it?
- Could it be what my mate died of?
- If I do have it, what can I do about it?

Desired outcome:

- Chas visits the site and is surprised to find it is really informative and easy to understand.
- He finds a clinic and goes there for a blood test on his next day off.

How does Chas feel about the site?

"It wasn't what I expected at all. It was clear and easy to follow, with videos and that. I'm getting tested all right."

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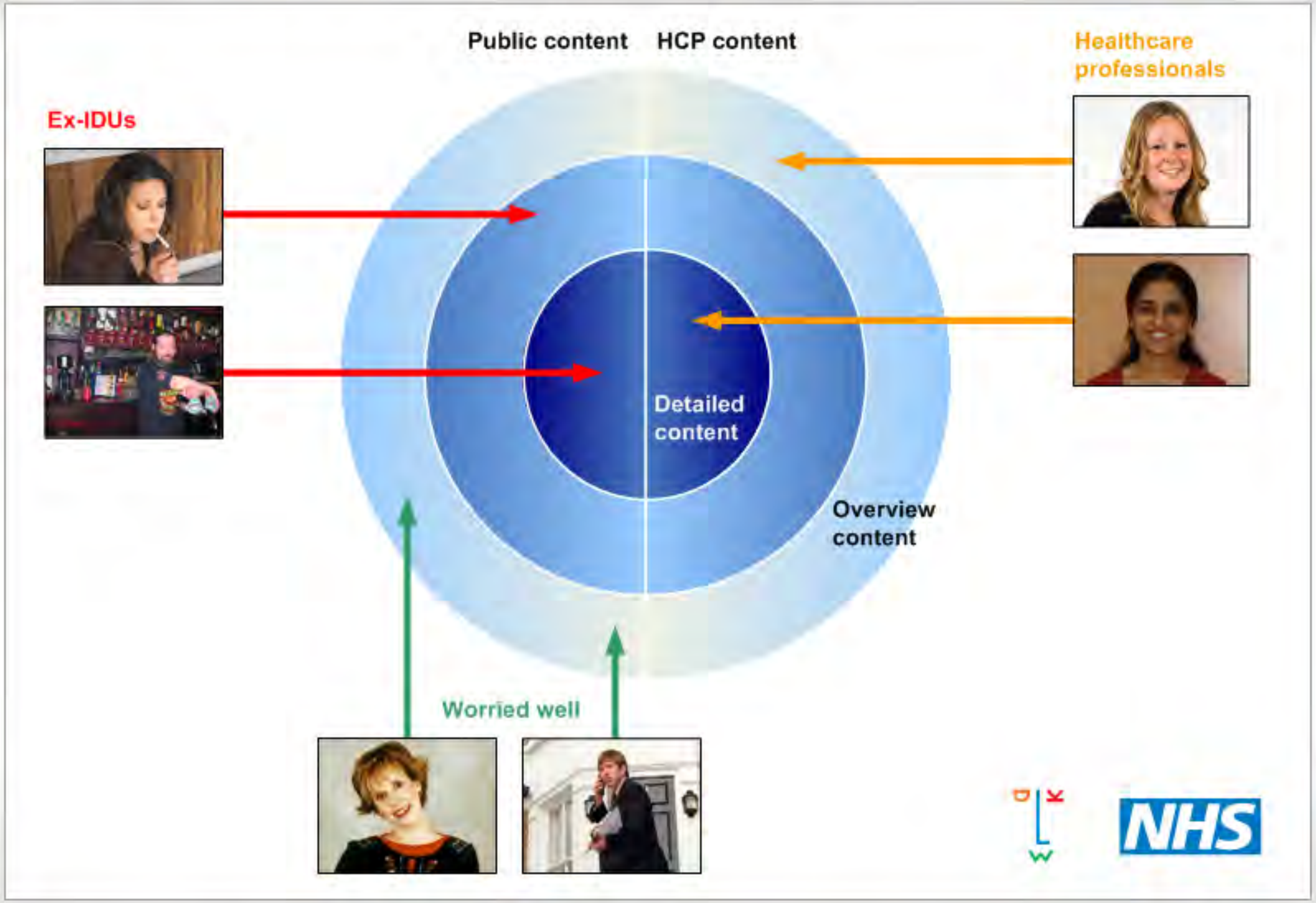

Public content
HCP content
Healthcare professionals
Ex-IDUs
Detailed content
Overview content
Worried well
NHS

Documenting and tracking user needs

From user-centric requirements to tracking success

Documenting and tracking user needs

- **User stories** are a great, user-centric way of breaking down the needs that you learn from your research into individual user requirements. They are also in a format that the whole team is used to using.
- But when you're developing a digital solution, and when it launches, are you **tracking** how **well** those user needs are being met?
- Here are a few ideas, based on the work that I'm currently doing at **DWP** (the UK's Department for Work and Pensions).

What are the user needs of our target audience?

The **primary user needs** were first established during Discovery and Alpha; however, we are regularly **monitoring**, **reviewing** and **updating** them. At this moment, we are working with a set of 11:

*I need to appropriately **keep in touch** with my employee while they are off, so I know how they're doing, and I can offer them the right support.*

*I need help understanding what is **reasonable** and **possible**, so that I can **make adjustments** for my employee.*

*I need to feel that any advice I'm given is **relevant** to **my business** and **situation**, so I am confident in any decisions I need to make.*

*I need reassurance if **what I am doing is right**, so that I feel confident making right decisions and seek guidance if not.*

*I need to understand what **financial support** is available to me, so that I can access it if required.*

*I need to understand **expert health support** (and how to access it), so I can make an informed decision if it's right.*

*I need to understand how I can **foster a culture of openness** in my workplace, so employees are happy to disclose health conditions.*

*I need to make sure I have understood all my **legal responsibilities** for my employees, so my legal risk is reduced.*

*I need to appropriately **document** my **conversations with my employee**, so that I have an audit trail.*

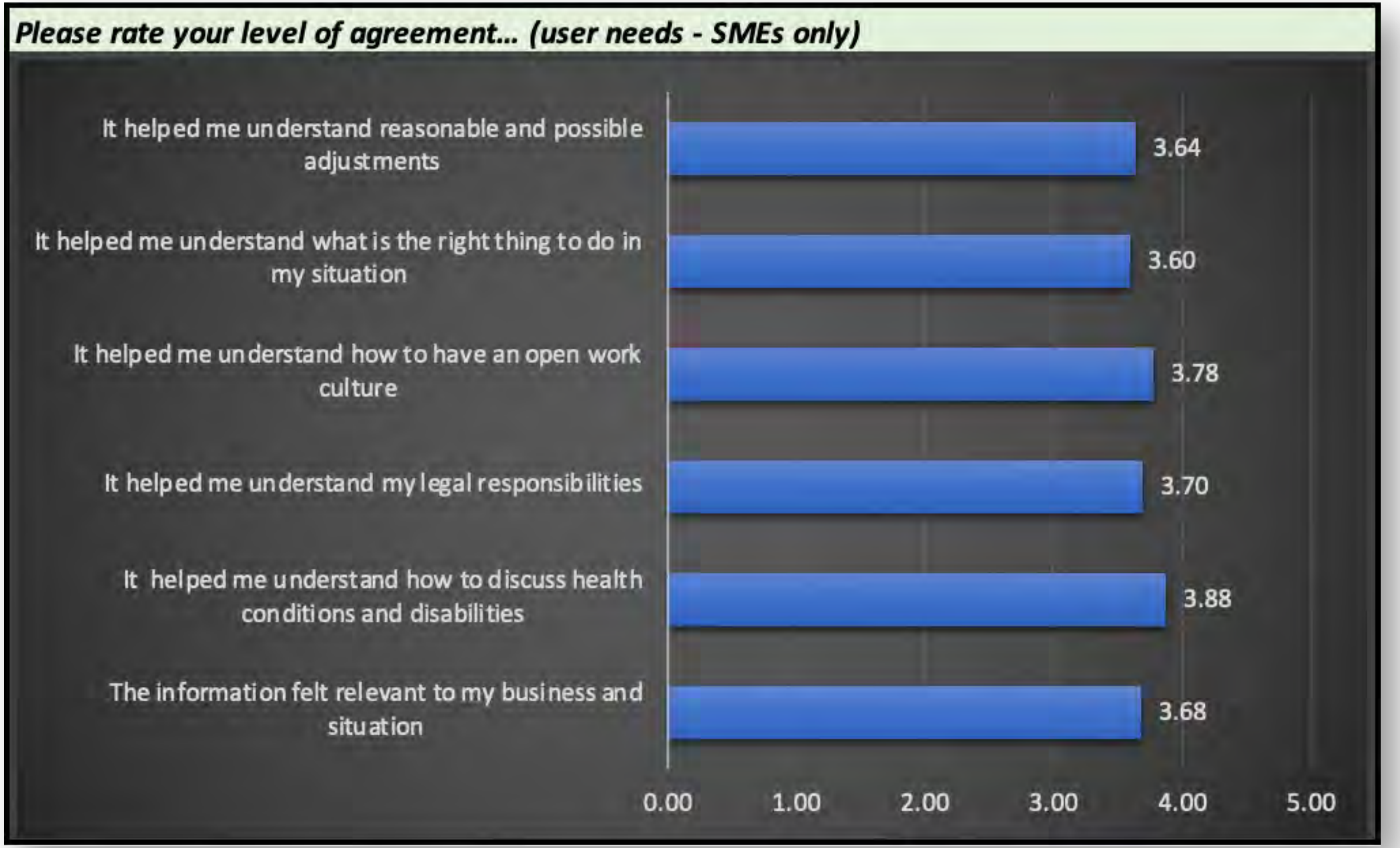
*I want to feel **comfortable** having **conversations about health conditions**, so I deal with things appropriately.*

NEW

*I need to understand if there is any information available to help me **recruit inclusively**, so I know what steps I need to take.*

List of pages in release 4.5.1		ER12	ER19	ER30	ER36	ER04	ER32	ER20	ER26	ER21	ER06	ER03 New!	
STA-4	Support with employee health and disability												
STA-Q2	Is your employee currently at work?												
EST-Q1	When did your employee go off work?												
EST-G1	You do not need to pay Statutory Sick Pay yet			SP				SP					
EST-G2	You must pay Statutory Sick Pay if your employee is eligible			SP	SP			KP					
EST-G3	You must pay Statutory Sick Pay if your employee is eligible			SP	SP			KP					
COM-Q1	Would you like advice on what to say to your employee while they're off?												
COM-G1	Stay in touch with your employee	KP		SP						SP			
EST-Q3	Has your employee told you they have a health condition or disability?												
EST-G4	Prepare for a conversation with your employee			SP	SP		SP				KP	SP	
EST-G6	What to do if your employee has not told you about a health condition or disability			SP							KP		
EST-G5	What to do if your employee has not told you about a health condition or disability			SP	SP	KP					KP	SP	
EST-G9	Ask your employee about a health condition or disability			SP							KP		
EST-G8	Ask your employee about a health condition or disability			SP							KP		
COM-Q3	Would you like advice on talking to your employee about their health condition or disability?												
COM-G3	Talk to your employee	SP		SP	SP	KP	SP			SP			
COM-Q2	Have you talked to your employee about any changes that they need?												
COM-G2	Ask your employee what changes they need	SP		SP	SP	SP	SP			SP			
REA-Checklist	Discussing changes at work		KP	SP	SP	SP		SP		SP	SP		
ADJ-Q2	Are you likely to be able to make the changes your employee needs?												
COM-G6	Decide on changes to support your employee		KP	SP	SP			SP	KP				
COM-G7	If you think you cannot make the changes your employee needs	SP	KP	SP	SP				SP				
ADJ-Q3	Is cost one of the reasons why you are unable to make the changes?												
FIN-G1	Tell your employee about possible financial support			SP	SP			KP					
ADJ-G5	Get expert workplace health support			SP	SP		KP		SP				
RET-G7	Support your employee as they get back to work			SP	SP								
ADJ-G10	Have regular meetings with your employee	SP		SP	SP		SP		SP	KP			
SUM-5	Summary of key advice			KP	KP								
Key pages total		1	3	1	1	2	1	3	1	1	5	0	1
Supporting pages total		4	0	18	13	2	4	3	3	4	1	2	1

KEY	
KP	Key page
SP	Supporting page


Please rate your level of agreement... (user needs - SMEs only)
It helped me understand reasonable and possible adjustments
3.64
It helped me understand what is the right thing to do in my situation
3.60
It helped me understand how to have an open work culture
3.78
It helped me understand my legal responsibilities
3.70
It helped me understand how to discuss health conditions and disabilities
3.88
The information felt relevant to my business and situation
3.68
0.00
1.00
2.00
3.00
4.00
5.00

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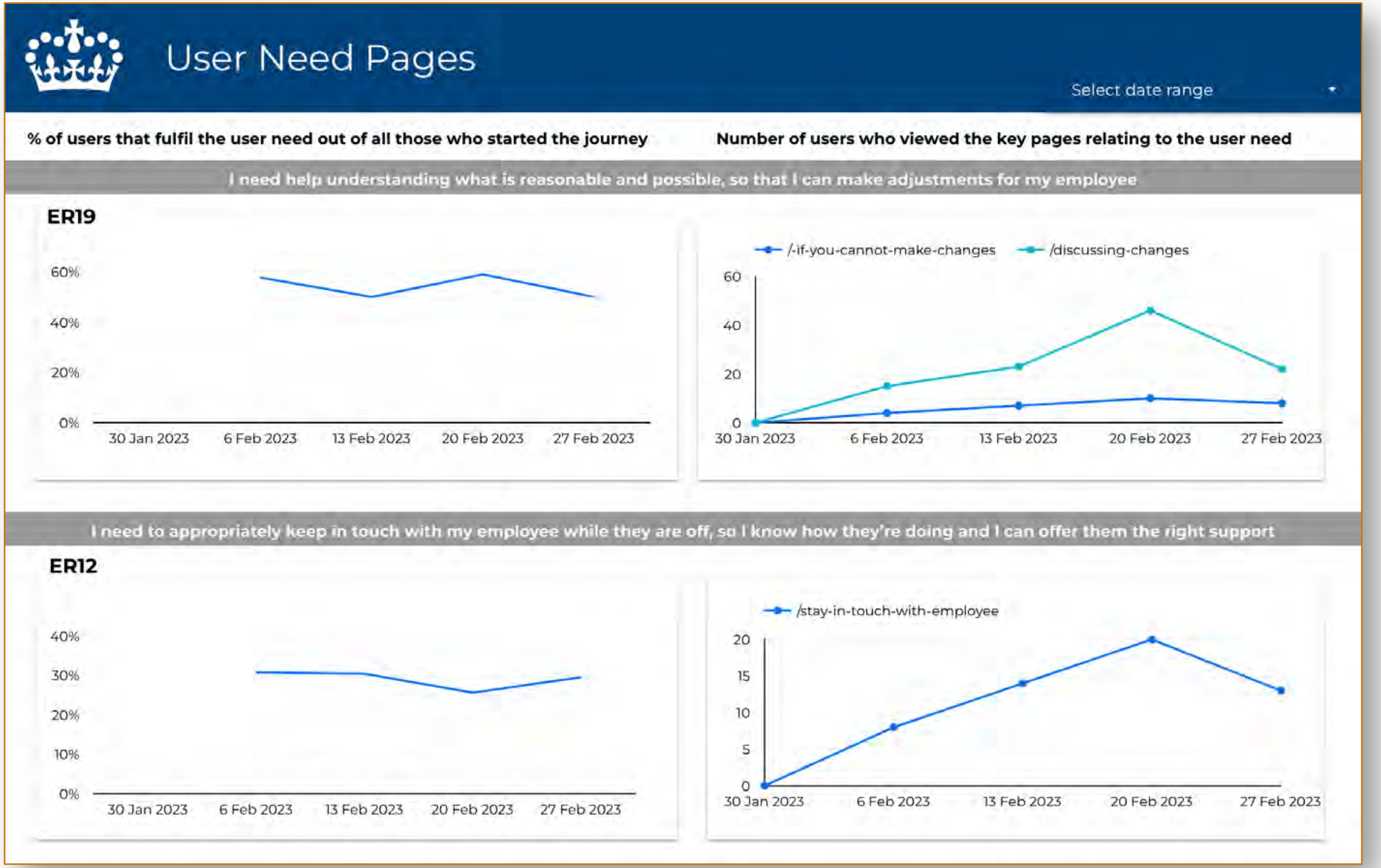
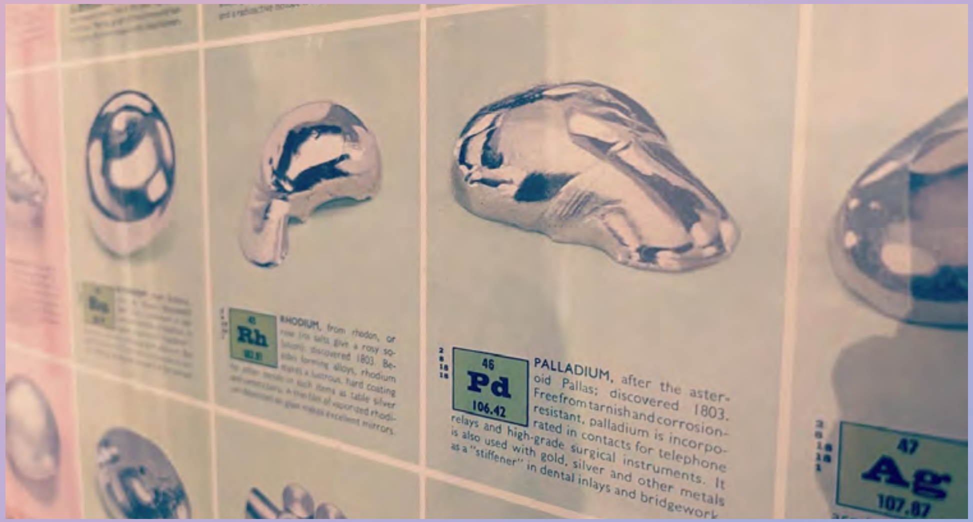


User Need Pages
Select date range
% of users that fulfil the user need out of all those who started the journey
Number of users who viewed the key pages relating to the user need
I need help understanding what is reasonable and possible, so that I can make adjustments for my employee
ER19
60%
40%
20%
0%
30 Jan 2023
6 Feb 2023
13 Feb 2023
20 Feb 2023
27 Feb 2023
/-if-you-cannot-make-changes
/discussing-changes
60
40
20
0
I need to appropriately keep in touch with my employee while they are off, so I know how they're doing and I can offer them the right support
ER12
40%
30%
20%
10%
0%
/stay-in-touch-with-employee
20
15
10
5
0

Guerrilla research and hall testing

"Seat of the pants" research can be rewarding and fun.

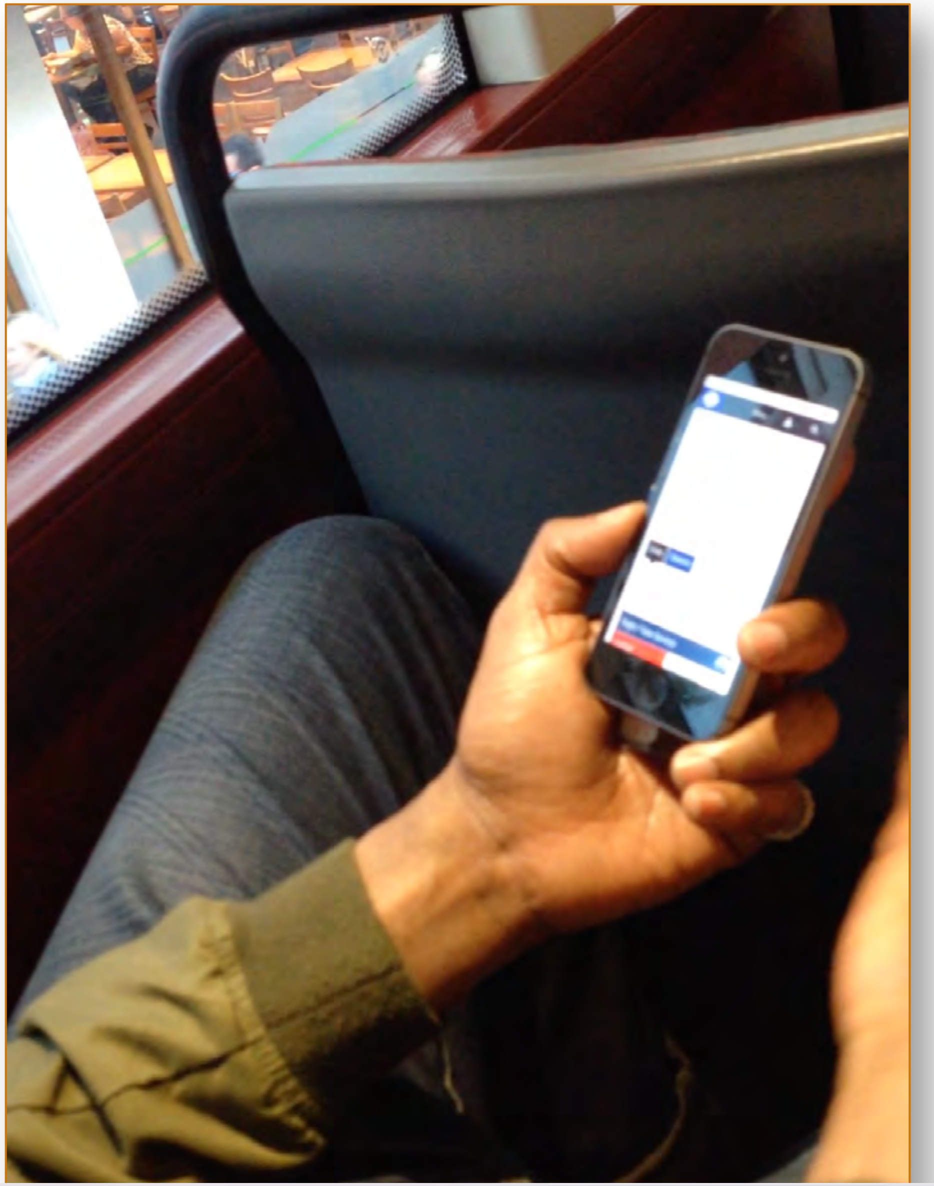


Guerrilla research

- In **Guerrilla research** you don't recruit participants – you just set up to do conduct your research in a place where your target users are likely to be found and ask if they'd be **happy to speak** with you for a few minutes.
- Since you'll be interrupting participants from the whatever they're doing, your research sessions need to be **short** – 15 minutes is probably the longest you'll ever get away with.
- When approaching a participant, you will first have to "**screen**" them to make sure that they have the right profile for your research. If they do have the right profile, it's only fair to offer a **small incentive** in return for a few more questions.
    - For example, if your research is about a website for **visitors' travel** in London, you might wait inside a **tourist office** and ask people if they are using public transport during their stay. If they agree to speak to you, a **one-day travelcard** would go down well as an incentive.

Hall testing

- **Hall testing** is like guerrilla testing in that you don't book people's time beforehand, but it's usually conducted using colleagues at your organisation who **aren't directly associated** with the project.
- Again, it's best to politely check **if they have time** to speak with you and offer them a **small incentive**. A great place to hang around for this is the **staff restaurant** or **games room** – places where people go when they're not super-busy with work.
- This is most useful when the people you choose for your research have **something in common** with the demographic of your target audience. For example, hall testing was used to validate some early concepts for the **Coke Stories** app, whose intended target audience was 16-25 year olds. All the participants who were approached were from the same age group and had to be "non-rejectors" of Coca-Cola.



Don't underestimate how long it will take!

- It's very tempting to assume that just because guerrilla research sessions are **short**, you can do loads of them in one day!
- In fact, most of the time, people will make excuses **<u>not</u>** to talk to you and you'll find yourself spending a lot of time **waiting around**. You'll also have to develop **thick skin** – no-one likes to be rejected!
- So it's wise to assume that you'll manage about the **same number** of guerrilla sessions in one day as you would with standard formal evaluative research.
- But you can **maximise your chances** of getting people to talk to you by looking official – a **clipboard** and a **company badge** can be persuasive. But the most important thing to arm yourself with is a tempting and relevant incentive!

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Now it’s your turn!

Researching a target audience for a pitch

Brief: Researching a target audience for a pitch

- Your team has just been given an **RFP** for a **new potential client**.
- You believe that understanding their audience will help differentiate **Endava** from the competitors who are also pitching for the work.
- The client is Dacia and in early 2024 they will launch **Bigster**, their new 4.6m long SUV. It will compete against the Land Rover Discovery Sport and the Volkswagen Tiguan.
- To generate excitement before the launch, they would like to create and build a **mobile app** which will allow users to configure and pre-order their Bigster. The winners of the pitch will be given the brief to create the app.
- Please note down some ideas on the Miro board about the type of research you would do to add some "**voice of customer**" to the pitch presentation and inform any design activities.

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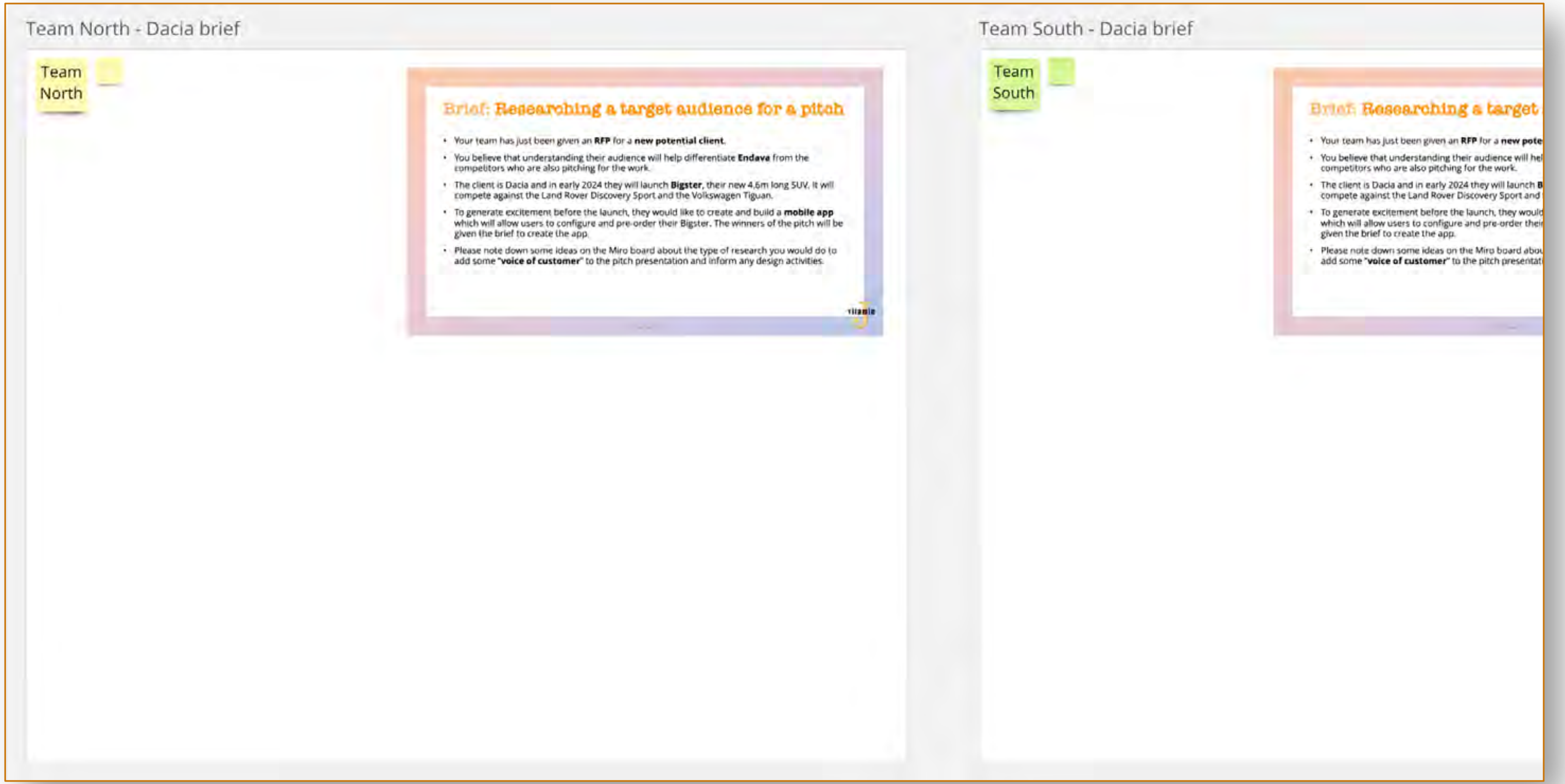
Please find a team space on the Miro board



bit.ly/vj4miro

UX expert audits

Drawing on your experience to shape someone else’s.

UX expert audits

- Sometimes you don't have the **budget** or the **time** to do a round of research, but you know that there are some issues with a digital service. This might be the service that you're planning to replace, for example.
- On these occasions, a **UX expert audit** might be the solution. You draw on your experience as a user researcher to walk through the service **as if you were** a representative of the target audience, trying to complete tasks that the app or website is supposed to support, and making notes in a structured way. This methodology is called "**cognitive walkthrough**", and it's surprising **how many issues** can be identified in this way.
- This becomes even more useful when the technique is applied to a **competitive landscape**, so that you can see how well your client's app or website performs when measured against its rivals. You'll learn not only about **issues**, but also about additional **features** and **content** enjoyed by competitors' customers that you (and your client) could learn from.

User experience ratings - My O2

0 = very poor, 4 = very good

Number	Scenario	Notes	Experience rating	Score
1.1	Onboarding - Signing in	After reinstalling and signing into the app, the customer is asked for permissions for notifications, TouchID, access to contacts and location tracking. It's all quite straightforward with no surprises, which allows the new customer to get up and running quickly.		4
1.2	Onboarding - Getting to know the app	There's a Welcome to My O2 tutorial, which informs the new customer about Aura, account management, upgrades and enhancements to my tariff, and exclusive perks. Even though this information is clear, concise and designed to be seen once, there's no obvious way to see it again, in case it was skipped through first time.		3
			Subtotal (out of 8)	7
			Subtotal (out of 10)	**8.75**
	Turn WiFi off, enable cellular data		Done	
	Make 2-3 calls		Done	
	Send 2-3 texts		Done	
	Use mobile data to download something		Done	
2.1	Account mgmt - Check data usage	Data usage is the most prominent chart on the Account screen, so it's easy to get an update of how much is left. Tapping on the ring chart links through to a more detailed breakdown, showing how much data has been used so far and any extra charges. There's a link to previous usage, which displays a month by month chart.		4
2.2	Account mgmt - View latest bill	A little further down the Account screen is a message about when my next bill arrives, along with the extra charges that will be added. Below this is a compact statement of the Latest Airtime Bill. The significance of Airtime is not abundantly clear for new customers, but otherwise the necessary information is well laid-out.		3
2.3	Account mgmt - Making a payment	Tapping on the Make a Payment call to action on the Account screen links to a simple form on the My O2 website. If anything, this form is more mobile-friendly than the app's Account screen, with larger text. The bill is divided into two components - Pay Airtime bill and Pay Device Plan. This clears up the earlier confusion about Latest Airtime Bill, which an established O2 customer would already be aware of.		3
2.4	Account mgmt - View details of tariff	It's necessary to scroll down to the bottom of the Account screen to see the View or change your tariff link. Along the way, there are several Upgrade messages, so it's difficult not to feel that you're being sold to, which may be off-putting for some customers. The Your tariff details page is clear and well laid out, but there's yet another Upgrade call to action at the bottom.		2
2.5	Account mgmt - View historical transactions	Historical transactions are accessed from the View and compare Bills link. The Bills screen has a clear chart showing the last 6 months spend and also shows the average bill for this period. This is useful for checking if the month's spend has been exceptional. There are two links to Make a payment and Visit Airtime Rewards - these represent a good anticipation of the customer's next steps.		4
			Subtotal (out of 20)	16
			Subtotal (out of 10)	**8.00**

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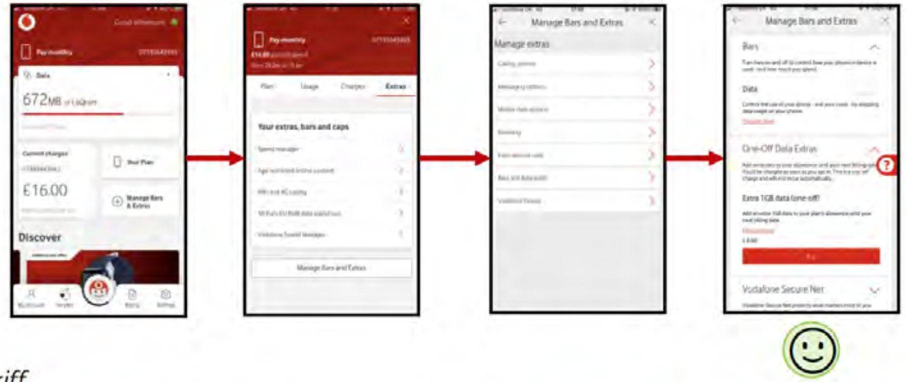
My Vodafone – 5. Shop and upgrades (1/3)

5.1. Viewing and buying extras 3/4

- To buy extra data, the customer taps on the **Manage Bars & Extras** module on the **Home** screen.
- This links to a menu of extras, bars and caps within the app. Tapping **Manage Bars and Extras**, opens the personalised website, where there's an option to buy a one-off data extra.

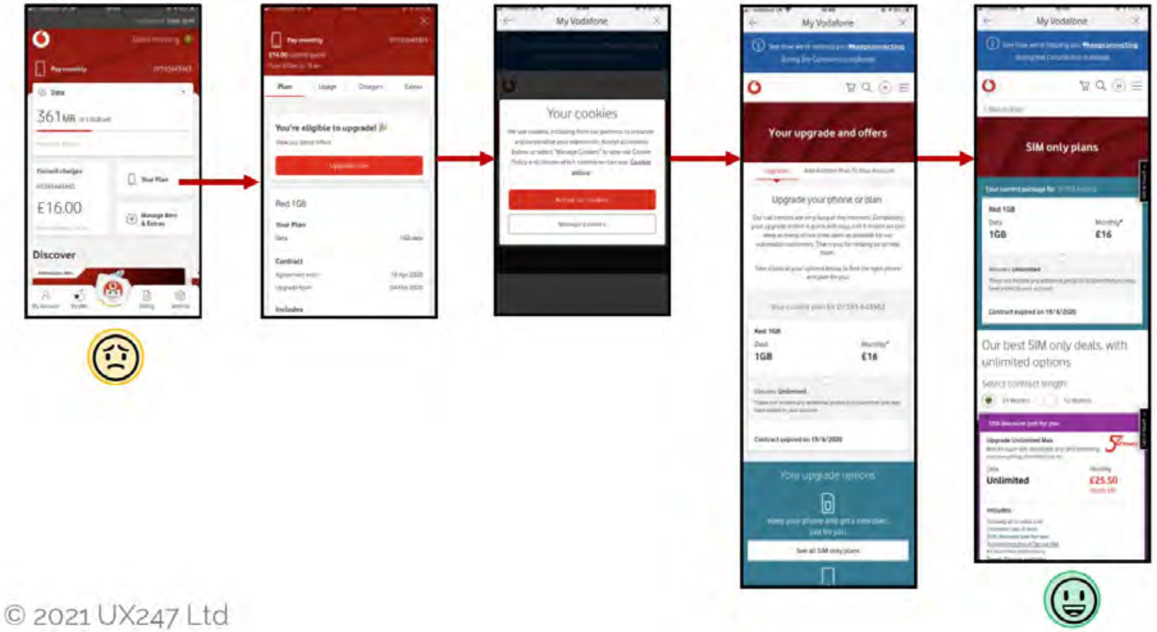
Viewing and buying extras



5.2. Changing tariff 3/4

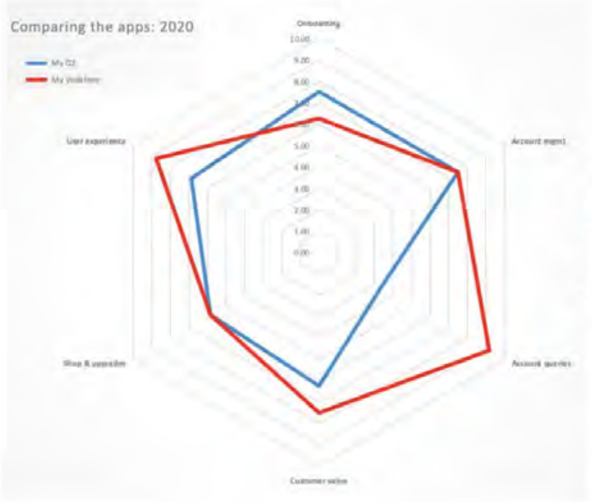
- It's not immediately discoverable how to change a tariff - it's necessary to tap on the **Home** screen's **Your plan** and then follow the Upgrade now link.
- Here, the **SIM only** and **Phone plan** upgrade options are available. Selecting See all SIM only plans links to a listing page, where the information on each SIM only plan is clearly presented in card from. The current package is included for easy comparison.

Upgrading the tariff



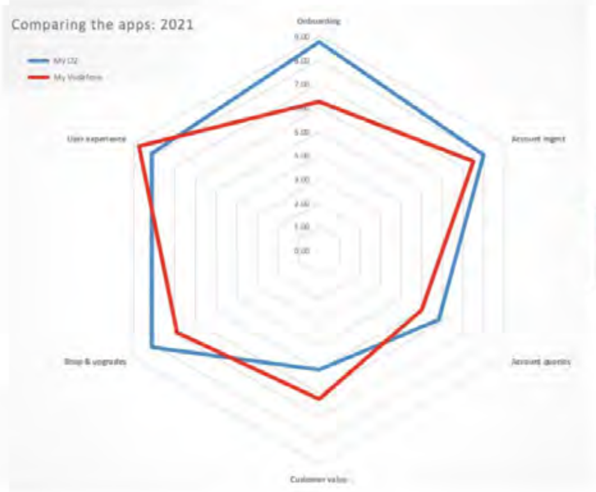
Comparing the apps overall

- Comparing the spidergrams for April 2020 with January 2021, it is clear to see the improvements that **My O2** has made to its user experience.
- In the meantime, **My Vodafone** has remained very much the same, except in the Account queries category where it has moved backwards, due mostly to the previously seamless transition between app and web pages being constantly broken by an Accept cookies alert.
- In 2020, **My O2** was strongest in just one category, while in 2021 it is now judged to be better than **My Vodafone** in four.
- **My O2** now has a higher total score of **43.84**, which is calculated by adding together the scores in categories 1 to 6. The app still has more features than its rival (**43** compared to 34 for My Vodafone).



April 2020

Mobile app	Total (out of 60)
My O2	37.29
My Vodafone	45.00

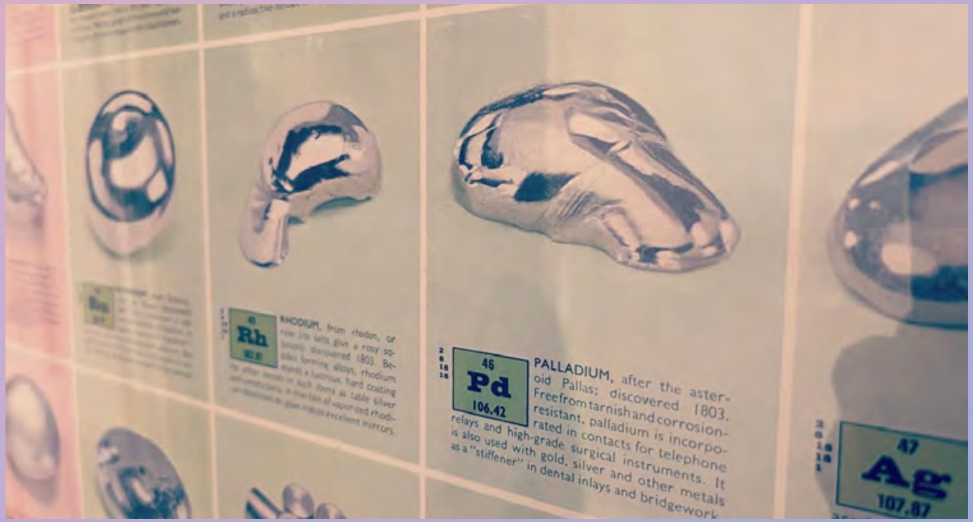


January 2021

Mobile app	Total (out of 60)
My O2	43.84
My Vodafone	40.63

Paper prototype testing

For evaluating concepts before you invest time in design and development



Paper prototype testing

- You **don’t have to wait** until you have a finished design to perform useful evaluative research – stimulus can be of any fidelity, including paper sketches!
- This may be useful if you have a bunch of **concepts** (say, from a design workshop) and you want to test which ideas resonate best with your audience.
- You will need to **frame the research carefully** to make sure that participants understand it’s ideas you are testing, not the quality of sketching. If handled carefully, this kind of early research can be rewarding – and fun!

LEAN APPROACH

Three rounds of design stages for the risk management

Stage 1 | **Stage 2** | **Stage 3**

Low fidelity
= Testing ideas

Testing concepts prioritised based on complexity of the issues & alignment with goals

Mid-fidelity
= Testing user journeys

Combining the winning concepts into coherent user journeys

High-fidelity
= Testing user interface

Applying the brand's look and feel, thinking through fine interactions & perfecting details

PAPER PROTOTYPE TESTING

Five concepts in paper prototype, 45 minute sessions with 6 participants

Quantitative research

You've found out what. This is to answer the question "how much?"

Quantitative research

- So far, all of the research methods we have looked at have been **qualitative**, which is about understanding **thoughts** and **experiences**, leading to in-depth insights.
- Quantitative research is used to test **theories** and **assumptions**. The outputs from quantitative research are numbers and graphs, and the best quantitative research tools have built-in analysis tools, so that you can see the results of your research in real time.
- Qualitative and quantitative research are often used together effectively. For example, if all of your face-to-face research is conducted in **one city** and you want to make sure that the same observations apply across the whole country, you might decide to perform some additional online quantitative research.
- In the next section, we will look at some specialist online (quantitative) research tools. But the most common and useful tool (because it's so easy to set up) is the **survey**.

Quantitative research: Survey tools

- **Google Forms** and **Microsoft Forms** are a great way to get started with surveys – and they are strangely alike!
- You can easily **compose** multi-page surveys, **customise** the look and feel (a little), **launch** and **send invitations** from within the environment, monitor the number of respondents, and use the in-built **analysis tools** to query the data that comes back. If that isn't enough, you can export the data as a .csv file and play with it to your heart's content.
- If you want a step-up from the above, then **Survey Monkey** allows you to build surveys with sophisticated **branching logic,** powerful **analysis tools** such as sentiment analysis and **reporting features** such as exporting directly to PowerPoint or PDF.

Surveys: How long?

- It's very tempting to throw a **huge number** of **questions** into a survey, but this will affect your completion rate. Only people with a lot of time on their hands will complete your survey, and these aren't necessarily the people that you want to hear from!
- If you are **not offering** an **incentive** for completing your survey, then you should aim for no more than 5 minutes completion time – most survey tools will estimate this for you. If the survey is designed to gather **feedback** on a **live service**, you can push the completion time to a **few extra minutes** – people will often spend time helping you improve a service that they have just used.
- However, if your survey is any longer than this, you will have to offer an incentive for completing the survey. A useful rule of thumb here is £15-20 (or **€15-20**) for **15-20 minutes**.
- Incentivising a survey adds a few extra **complexities** though – for example, you have to closely **monitor** the number of completes and close the survey when you reach your target, or you'll blow your budget!

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Surveys: Dos and don’ts

- You can keep the length of your survey down – and make it easier to analyse – by reducing the number of **verbatims** (free text boxes) in the survey script, and using multiple choice questions instead.
- If you are planning to follow up your survey with more in-depth research, you can use your survey to **build your own panel** of participants. However, you must be very clear about how their personal data will be treated.
- Add a yes/no question towards the end of the survey asking respondents if they would be **willing to participate** in future research. If they agree to this, take them to a separate page on which you capture their name and contact details, along with any other information you might need for your future research, such as job role.
- Since you are now capturing **personal information**, any outputs from your survey should be password protected and stored securely.

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Survey script: Example

User research course

Survey script

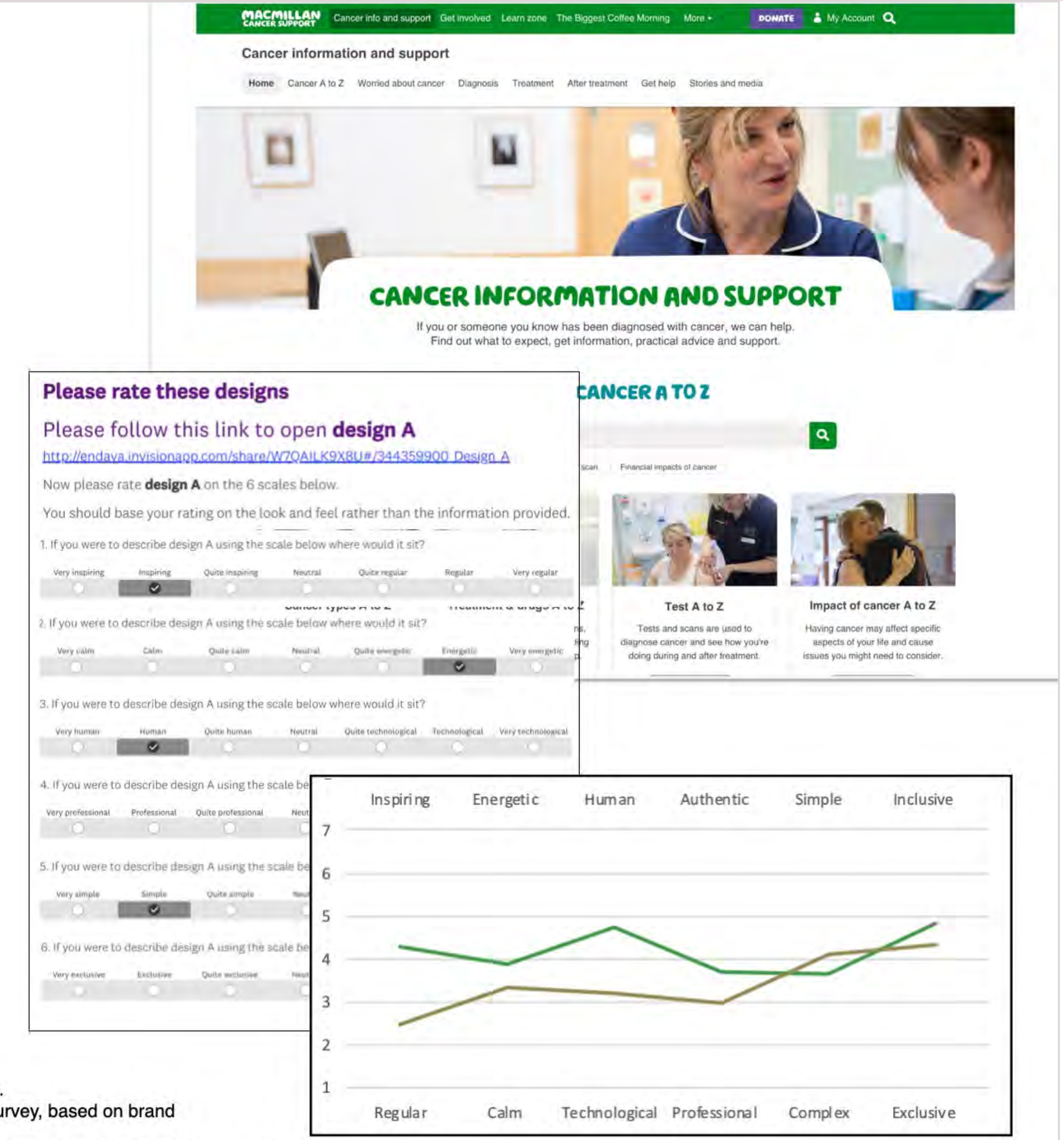
Version 1

25 February 2023

BRAND TESTING

By early 2019, we had created our first high-fidelity designs for Macmillan Cancer Support. To validate these, we devised some scales based on **Macmillan's brand characteristics**. Survey respondents were asked to rate our new designs and similar pages from best practice sites on these scales.

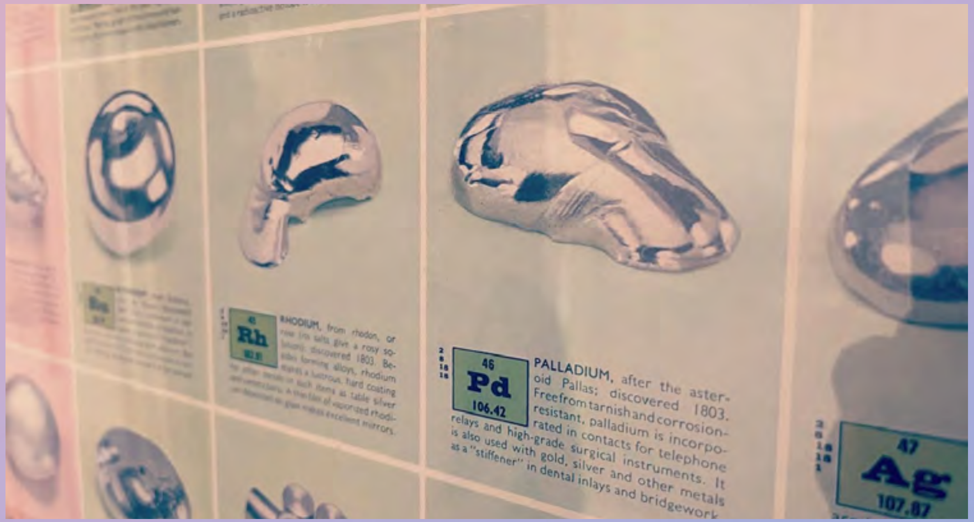
Encouragingly, our new Macmillan designs **outperformed** the equivalent pages from the current site and all except one of the best practice sites. The scales where our new designs did not fare quite so well give us clues about the characteristics that we need to **'dial up'** in our next round of designs.



Macmillan design research
Top: One of the page designs tested.
Left: The rating scales used in our survey, based on brand characteristics.
Bottom right: How our new designs (green line) rated against an average score for 4 other websites.

Online research tools

For card sorting, IA testing
and unmoderated research



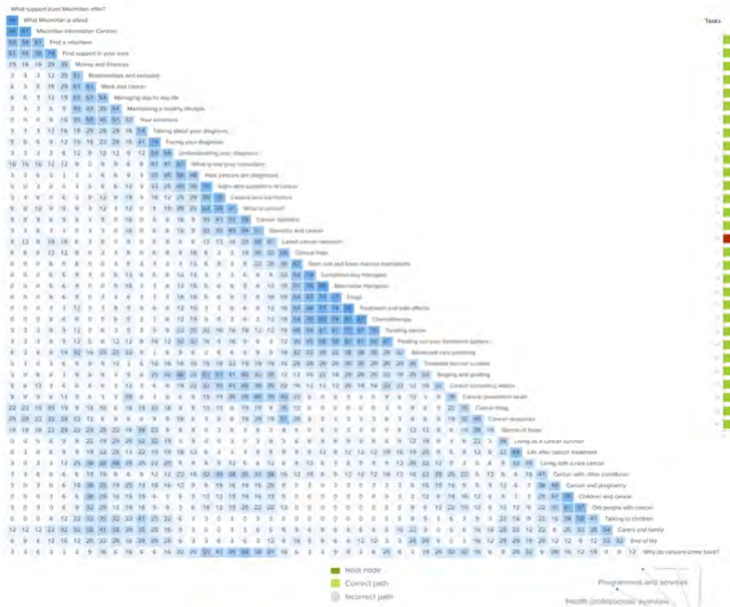
Online research tools

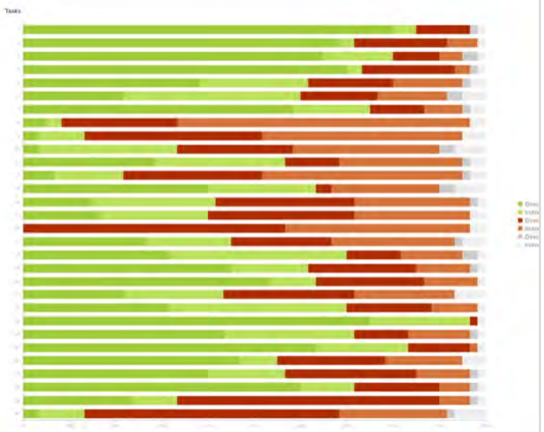
- There are several **online tools** that allow you to conduct **remote unmoderated research** on a quantitative scale.
    - Some are useful for testing **specific aspects** of the user experience, such as the navigation. Optimal Sort and Treejack, both part of the Optimal Workshop suite, are great examples.
    - Others, such as Userzoom, allow you to **set tasks** for your respondents on a live site or prototype and analyse how successfully they have been able to complete them.
    - There are also online tools, like Hotjar, that record the **interactions** your users make and present them in **heatmap form**.

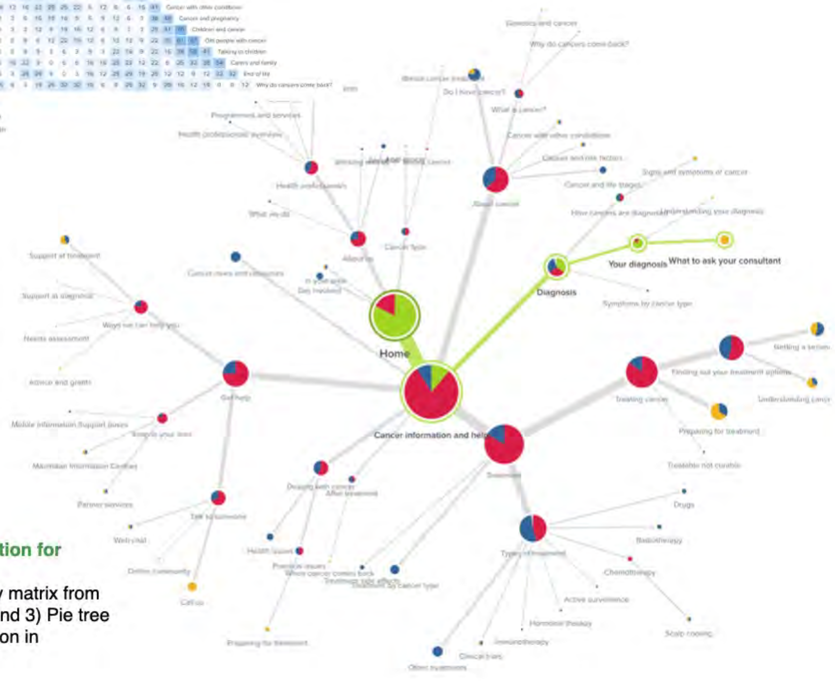
CARD SORTING AND IA VALIDATION

To improve the information architecture and navigation, we have been using **Optimal Sort** and **Treejack**. Optimal Sort is used for **card sorting**, to establish the first cut of an IA, and Treejack is used to **validate** and refine the **IA** by measuring the success of content-seeking tasks.

Their existing website has a very high bounce rate, suggesting that many visitors are not finding the content that they need. By combining a user-centric IA and navigation system with strong UX design, we expect to significantly improve the user experience of the new **macmillan.org.uk**.







Online card sorting and IA validation for Macmillan
Clockwise from top left: 1) Similarity matrix from online card sort; 2) Task overview and 3) Pie tree of an individual task from IA validation in Treejack.

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INFORMATION ARCHITECTURE

A 1.0 Home *

- 2.0 Cancer A to Z
  - **Cancer types**
    - Anal cancer
    - Bile duct cancer (cholangiocarcinoma)
    - Bladder cancer
    - Blood cancers
    - Bone cancer
      - Bone cancer, secondary
    - Bowel cancer
      - Colon cancer
      - Rectal cancer
      - Small bowel cancer
    - Brain tumours
      - Brain tumours, secondary
    - Breast cancer
      - Breast cancer in women
      - Breast cancer in men
      - Breast cancer, secondary
      - DCIS
      - HER2 positive
      - Triple negative
      - Inflammatory
      - Paget's disease
      - Phyllodes tumour
    - Cancer of unknown primary (CUP)
    - Cervical cancer
    - Children's cancer
    - Colon and rectal cancer (colorectal)
    - Eye cancer (ocular melanoma)
    - Follopian tube cancer
    - Gall bladder cancer
    - Head and neck cancers
    - Kaposi's sarcoma
    - Kidney cancer (renal cancer)
    - Larynx cancer
    - Leukaemia
    - Liver cancer, primary
      - Liver cancer, secondary
    - Lung cancer
      - Lung cancer, secondary
      - Non-small cell lung cancer (NSCLC)
      - Small cell lung cancer (SCLC)
- 3.0 Worried about cancer
  - **What is cancer?**
  - **Do I have cancer?**
    - Questions about cancer
  - **Causes and risk factors**
    - Potential causes of cancer
    - Family history and inherited cancers
    - Pre-cancerous conditions
    - Signs and symptoms by cancer type
    - Bowel cancer symptoms >
    - Breast cancer symptoms >
    - Lung cancer symptoms >
    - Prostate cancer symptoms >
- 4.0 Diagnosis
  - **Staging and grading**
  - **If you have been diagnosed**
  - **Understanding your diagnosis**
  - **Questions about your diagnosis**
  - **Talking about your diagnosis**
  - **Tests and scans**
    - Tests A to Z >
  - **Diagnosis by cancer type**
    - Bowel cancer diagnosis >
    - Breast cancer diagnosis >
    - Lung cancer diagnosis >
    - Prostate cancer diagnosis >
- 5.0 Treatment
  - **Finding out your treatment options**
  - **Understanding your treatment**
  - **Questions about treatment**
  - **Getting a second opinion**
  - **Understanding cancer statistics**
  - **Preparing for treatment**
  - **Types of treatment**
    - Radiotherapy
    - Chemotherapy
    - Surgery
    - Targeted and immunotherapy
    - Hormonal therapy
    - Stem cell and bone marrow transplants
    - Active surveillance
    - Clinical trials
    - Supportive and other treatments
    - Treatment & drugs A to Z >
  - **Treatment by cancer type**
    - Bowel cancer treatment >
    - Breast cancer treatment >
    - Lung cancer treatment >
    - Prostate cancer treatment >
  - **Side effects of treatment**
    - Physical impacts A to Z >
    - Late effects of treatment
- 6.0 After treatment
  - **Finishing your treatment**
    - Preparing for the end of treatment
    - Macmillan Organiser
  - **Recovering after treatment**
    - Lifestyle and wellbeing
    - Your feelings after cancer treatment
    - Relationships and sex
    - Follow-up care
    - Be aware of symptoms
    - Macmillan Organiser
  - **When cancer comes back**
  - **Treatable not curable**
  - **End of life**
- 7.0 Get help
  - **Physical impacts of cancer**
    - Physical impacts A to Z >
    - How we help
      - Cancer information and support phone line
      - Cancer information nurse specialist phone line
  - **Financial impacts of cancer**
    - Financial impacts A to Z >
    - How we help
      - Energy advice phone line
      - Financial guidance phone line
      - Welfare rights phone line
      - Benefits advice and tools
      - Grants to help with the cost of cancer
        - Macmillan grants >
      - Indirect grants
  - **Emotional impacts of cancer**
    - Emotional impacts A to Z >
    - How we help
      - Macmillan support line
  - **Practical impacts of cancer**
    - Practical impacts A to Z >
    - How we help
      - Macmillan support line
  - **Work impacts of cancer**
    - Work impacts A to Z >
    - How we help
      - Work support phone line
      - Macmillan at Work for employers
  - **Holistic Needs Assessment**
    - HNA
    - eHNA
  - **Talk to someone**
    - Call us
    - Online community
    - Web chat
    - Social media
    - Email us
    - Help in your area
  - **Local services**
    - Macmillan information and support centres
    - Mobile information and support buses
- 8.0 Stories and media
  - **Cancer stories**
    - Cancer story 1
    - Cancer story 2...
    - Cancer story n
  - **Blog**
    - Blog post 1
    - Blog post 2...
    - Blog post n
  - **News**
    - News article 1
    - News article 2....
    - News article n
  - **Videos**
    - Video 1
    - Video 2....
    - Video n
  - **Audio**
    - Audio 1
    - Audio 2....
    - Audio n
  - **e-Books**
    - e-Book 1
    - e-Book 2....
    - e-Book n

Now it’s your turn!

Card sorting to find a user-centric IA

Brief: Card sorting to find a user-centric IA

- A restaurant is about to open and they need your help categorising their **wine list**, which will appear on their website, mobile app, shop and wine menu.
- They are not sure whether customers will be able to find the wine they want best if it's sorted by wine type, grape variety, country of origin, or some other categorisation.
- Working as a team, let's use **Optimal Sort** to see if we can develop the perfect taxonomy for the restaurant.
    - We will have a go at **card sorting** 20-30 wines and then we'll analyse the results together, using Optimal Sort's built-in analysis tools.

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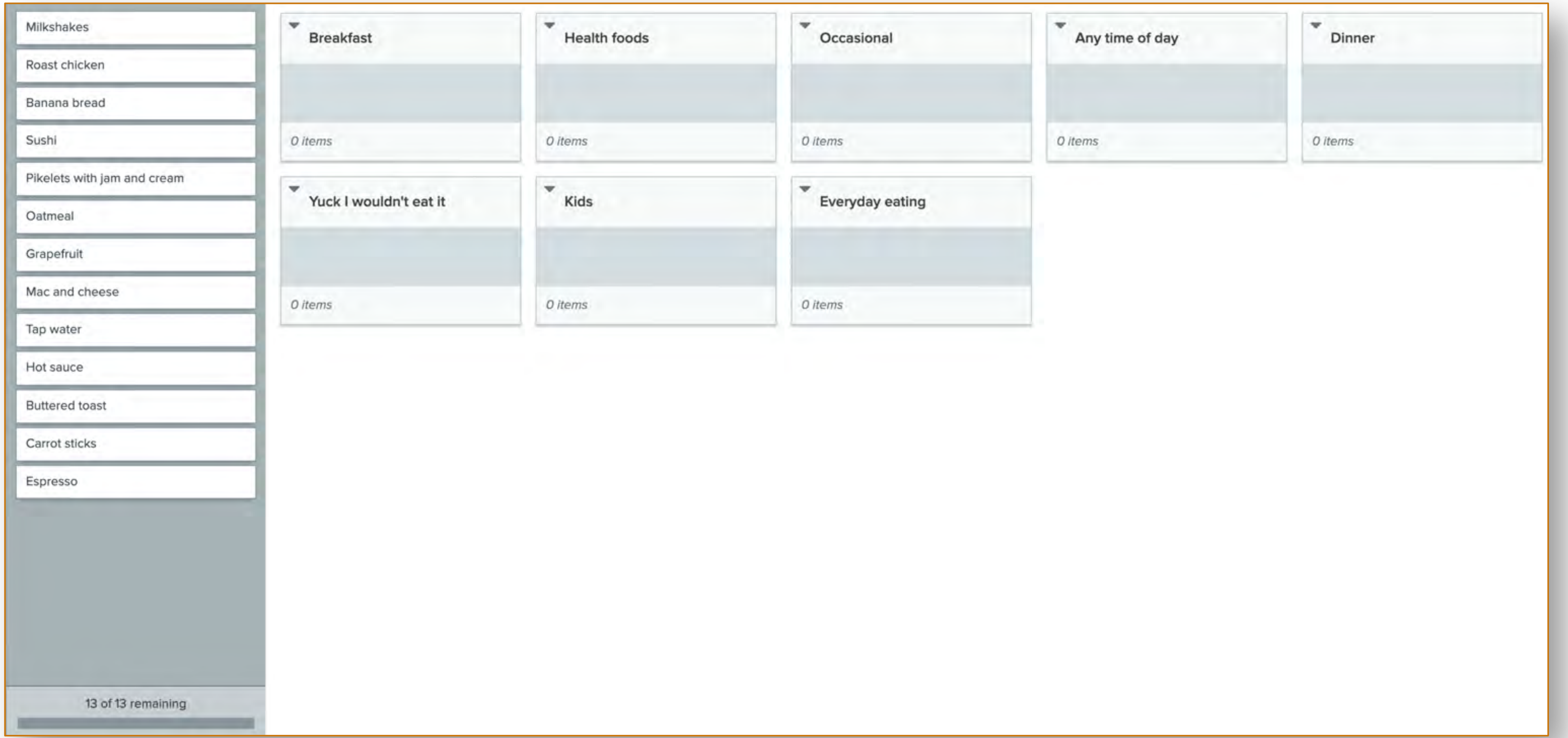
Wines to card sort

	A	B	C	D	E
1	**Campo Dorado** Red Spain Rioja	**Ovington's** White South Africa Chardonnay	**Azevedo** White Portugal Vinho Verde	**Maison Castel** Rosé France Côtes de Provence	
2	**Veuve Cliquot** Sparkling France Champagne	**No Name Reserve Lodi** White USA Chardonnay	**La Gioiosa et Amorosa** Sparkling Italy Rosea di Veneto	**La Umbra** Red Romania Feteasca Neagra	
3	**Casa Juanita** Red Argentina Malbec	**Vitalita delle Venezie** White Italy Pinot Grigio	**Beefsteak Club** Rosé Argentina Malbec	**Prince Alexandre** Sparkling France Crémant de Loire	
4	**Billy Bosch Reserve** Red South Africa Merlot	**Palacio de Primavera** Red Spain Tempranillo	**Mateus** Rosé Portugal Blend	**Canti** Sparkling Italy Prosecco	
5	**La Fama Winemakers Reserve** Red Chile Malbec	**Grace & Gable** White South Africa Chenin Pinot Grigio	**Bird in Hand** Rosé Australia Pinot Noir	**Taittinger Brut Réserve** Sparkling France Champagne	
6	**Pizo** Red Spain Garnacha	**Hartley's Block** White New Zealand Sauvignon Blanc	**Oxney Organic Estate** Rosé England Blend	**Codorníu 1872** Sparkling Spain Cava	

Optimal Sort



User research working with analytics

A powerful combination

User research working with analytics

- As a user researcher, you'll always find yourself **working closely** with the designers, product manager and BA on the team. But it's well worth your while to cultivate a close working relationship with the **data analyst**.
- Together, you can work on a plan for **measuring the success** of the digital service once it goes live and continuously improving it when you identify aspects that aren't working exactly as planned.
- For example, the data analyst might show you that there's a **high drop-off** rate in the sign-up process and you can set up a round of research to determine exactly why.
- Your experience of the **target audience** can also really help in setting up and interpreting **A/B** and **multivariate testing**, meaning that the options tested are based on actual observations rather than wild guesses.

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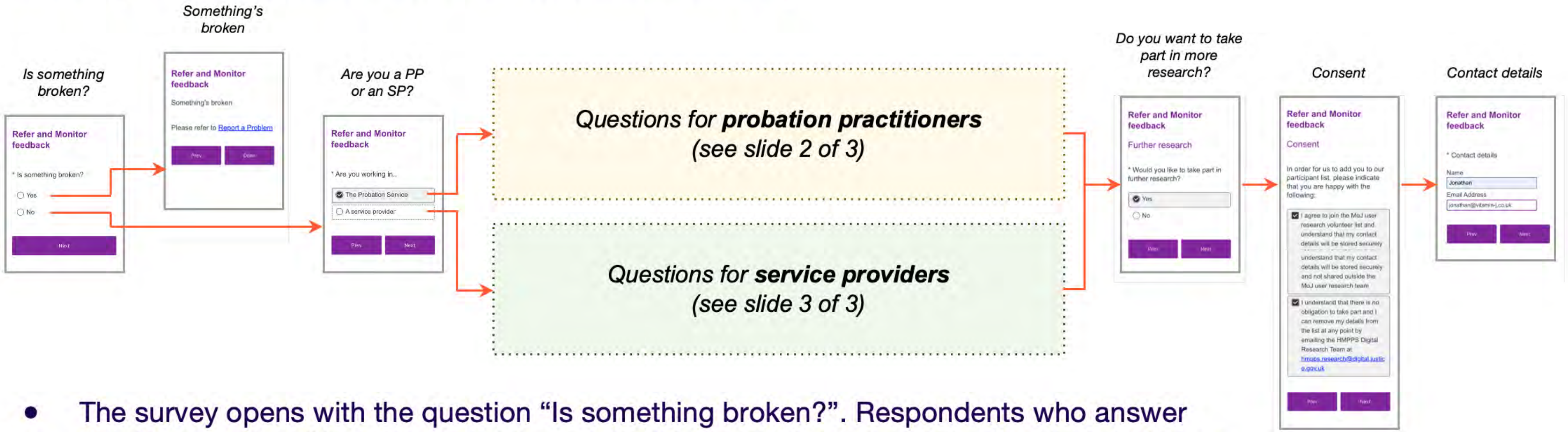
Research after launch on 26 June 2021

We expected to receive feedback after launch through the following channels:

1. **Analytic tools** built into the service (such as Google Analytics)
2. Calls to the **service desk**, some of which might be escalated to our team
3. A permanent **feedback survey link** in our service's header area
4. Feedback survey links in **automated emails** sent by our service at various strategic points in the process (the aim was to gather more contextual information about specific processes such as making or receiving referrals, action plans etc.)
5. A periodic **satisfaction survey** sent to users of the service
6. Follow-up **1:1 qualitative research**, via video conferencing or in person.

Surveys: Structure of the header survey



- The survey opens with the question "Is something broken?". Respondents who answer "yes" here are redirected to the **support desk**, who are better equipped to deal with bugs.
- Next, **probation practitioners** and **service providers** are segmented and are asked a set of questions specific to the way they use of Refer and Monitor.
- And the end of the survey, both user groups are asked if they would like to **participate in further research**. This was a valuable source of participants for our 1:1 sessions.

Key metrics from the header survey

Metric	Week 13 (Sep 20 - Sep 26)	Week 14 (Sep 27 - Oct 3)	Week 15 (Oct 4 - Oct 10)	Week 16 (Oct 11 - Oct 17)	4-week summary (Sep 20-Oct 17)
PP: Satisfaction score this week (rating)	**3.19**	**3.24**	**3.48**	**3.38**	**3.31**
PP: Satisfaction score this week (count)	32	21	25	16	94
PP: Finding interventions (week rating)	**5.00**	**3.67**	**3.50**	**3.33**	**3.80**
PP: Finding interventions (week count)	2	3	2	3	10
PP: Refering to interventions (week rating)	***4.00***	***3.44***	***3.44***	***3.67***	***3.69***
PP: Refering to interventions (week count)	*15*	*9*	*9*	*6*	*39*
PP: Viewing Action Plan (week rating)	**3.33**	**4.00**	**2.00**	**2.50**	**3.10**
PP: Viewing Action Plan (week count)	3	3	2	2	10
PP: Monitoring progress (week rating)	***2.50***	***2.80***	***2.00***	***4.00***	***2.54***
PP: Monitoring progress (week count)	*10*	*5*	*7*	*2*	*24*
Saves me time by PP (rating)	**3.25**	**2.76**	**3.36**	**3.50**	**3.21**
Saves me time by PP (count)	32	21	25	16	94
SP: Satisfaction score this week (rating)	**3.25**	**3.25**	**2.67**	**2.86**	**3.03**
SP: Satisfaction score this week (count)	16	16	9	21	62
SP: Receiving & assigning referrals (wk rating)	**4.00**	**4.00**		**4.00**	**4.00**
SP: Receiving & assigning referrals (wk count)	2	1		2	5
SP: Creating Action plan (wk rating)		***3.00***		***3.00***	***3.00***
SP: Creating Action plan (wk count)		*2*		*1*	*3*
SP: Giving session feedback (wk rating)	**2.00**	**1.00**	**1.00**	**1.60**	**1.56**
SP: Giving session feedback (wk count)	2	1	1	5	9
SP: Monitor interventions (caseload - wk rating)	***2.50***	***3.00***	***1.67***	***2.50***	***2.33***
SP: Monitor interventions (caseload - wk count)	*2*	*2*	*3*	*2*	*9*
SP: Creating End of service report (week rating)				**1.80**	**1.80**
SP: Creating End of service report (week count)				5	5
Quality of referral info for SP (rating)	**2.00**	**4.00**		**3.50**	**3.00**
Quality of referral info for SP (count)	2	1		2	5

The scoring on different pages of the header survey allowed us to track **key metrics over time**, such as:

- **User satisfaction** with the service (among PPs and SPs),
- Impression of **time saved** (PPs),
- **Quality** of referral information (SPs).

The latter two scores represent an **important tension** that our service had to navigate:

- Too much **time saved** by PPs, and the SPs might not receive referrals they could work with,
- Too much effort being put into **inputting information** by the PP might represent too much of a draw on their time.

Tagging to reveal the main pain points

Tags for PPs	Frequency (total since launch)	Frequency (weeks 0 to 4)
REFERRAL PROCESS		
Too much duplication of effort	0	0
Want to amend a referral	20	5
Make process context-sensitive	0	0
Want to edit info pulled in	7	7
Want to delete a draft referral	3	2
Want to attach documents to referral	2	1
Wrong info is pulled in	0	0
No way back at referral end	4	4
Want to make multiple referrals	6	4
Referral process too long	1	1
On-screen guidance needed	5	5
My referral was rejected	0	0
Want to make an urgent referral	2	1
Customise process by intervention type	0	0
Feedback on draft referrals	2	0
Want to refer on someone's behalf	5	2
Feedback on cancelled referrals	2	0
Unaware that referrals save as drafts	4	1
MY CASES DASHBOARD		
General feedback on My Cases	0	0
Feedback on My Cases sorting	0	0
Would like to see referral date	2	2
Referrals made for s.o. else on My Cases	5	5
Want to see other PPs' referrals	3	2
Need to remember my sort	0	0
Cancelled referrals still show	0	0
Show intervention progress on My Cases	0	0
Search needed on dashboard	3	2
Too much info/too cluttered	0	0
Show me what needs to be addressed	5	1

- All survey responses are collated in **analysis spreadsheets** (one for PPs, one for SPs) and tagged from a limited vocabulary of categorised tags.
- This allows us to identify **pain points** and **feature suggestions** that keep repeating from week to week, and organise more in-depth research to better understand those pain points and needs.
- We can also monitor whether those pain points and needs are **no longer reported** after the team has launched a fix.
    - For example, for the first 12 weeks, a common request was for a way to **share progress** that was not connected with session feedback. After case notes were launched on 15 September 2021, the tag **Need for case notes** no longer appeared.

Any questions?

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