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WATCH, LISTEN, LEARN

How to Run a (Remote) User Study



LET'S CONDUCT A MINI USER STUDY.

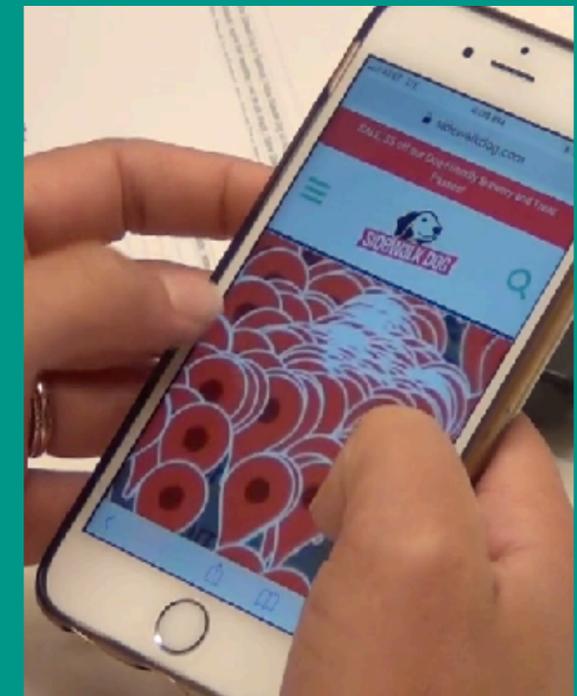
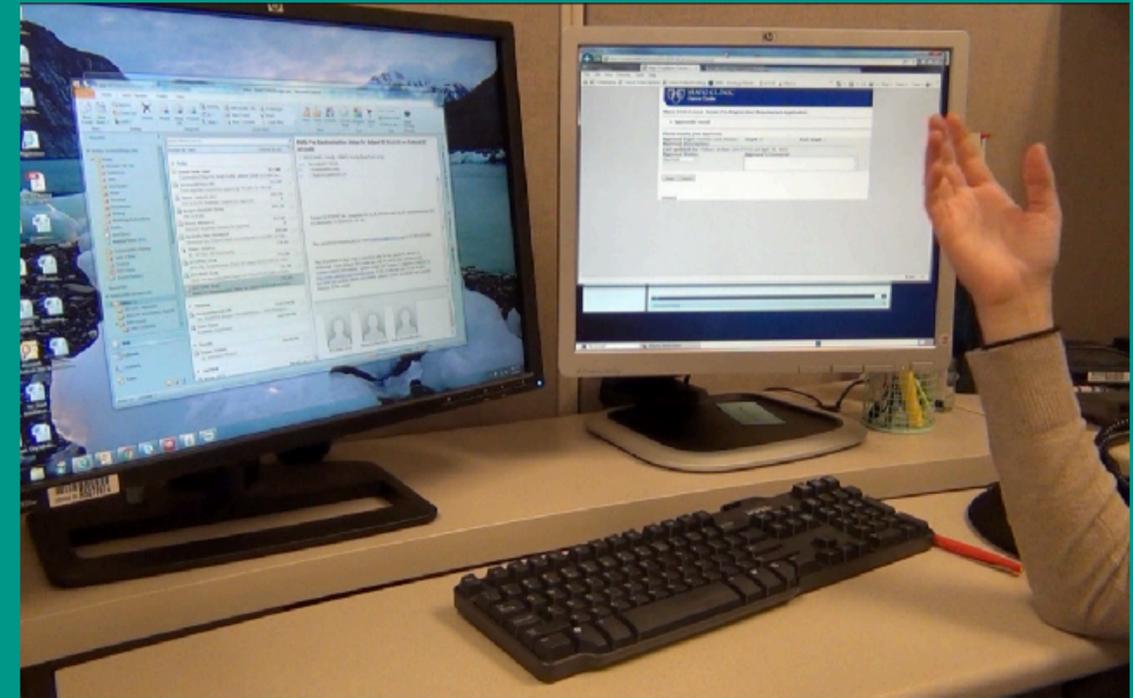
OUR MINI USER STUDY

- **Share your screen.**
- **Complete a few simple tasks.**
- **Answer a few simple questions.**
- **No right or wrong.**
- **We want to learn how you interact with our application.**
- **Narrate your thoughts as you click through.**

WHAT IS A USER STUDY?

WHAT IS A USER STUDY?

A facilitator asks a participant to complete a set of tasks using a specific interface while observing their behavior, listening for feedback, and learning problems or opportunities within the design. - NNGroup



WHY A USER STUDY?

WHY A USER STUDY?

- Identify problems
- Learn about user behavior
- Discover opportunities to improve the design
- “Eureka moments”
- We’ll share some anecdotes at the end.

Why Usability Test?



Uncover Problems
in the design



Discover Opportunities
to improve the design



Learn About Users
behavior and preferences

NNGROUP.COM **NN/g**

BEFORE THE INTERVIEWS

HOW TO CONDUCT A USER STUDY. ESPECIALLY REMOTELY.

Core Elements of Usability Testing



Facilitator

Guides the participant through the test process



Tasks

Realistic activities that the participant might actually perform in real life

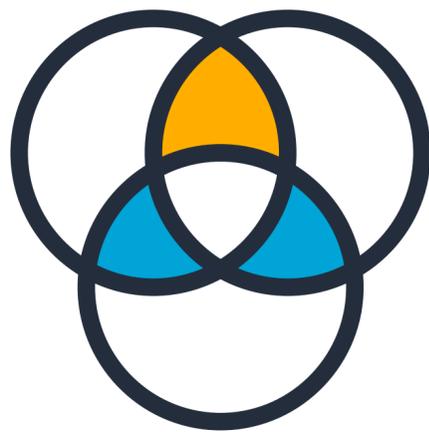


Participant

Realistic user of the product or service being studied

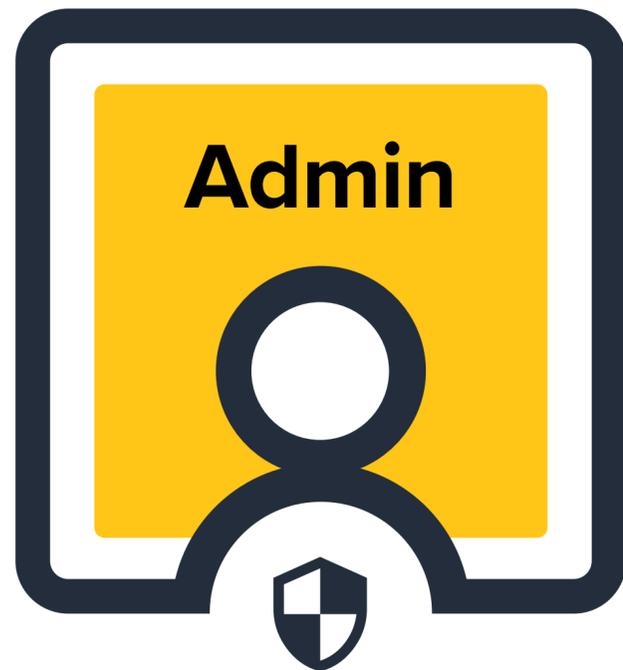
UNDERSTAND THE PROBLEM DOMAIN

- **Workshop sessions, heuristic review, interview product owners, sales, and support.**
- **Use subjects' language.**



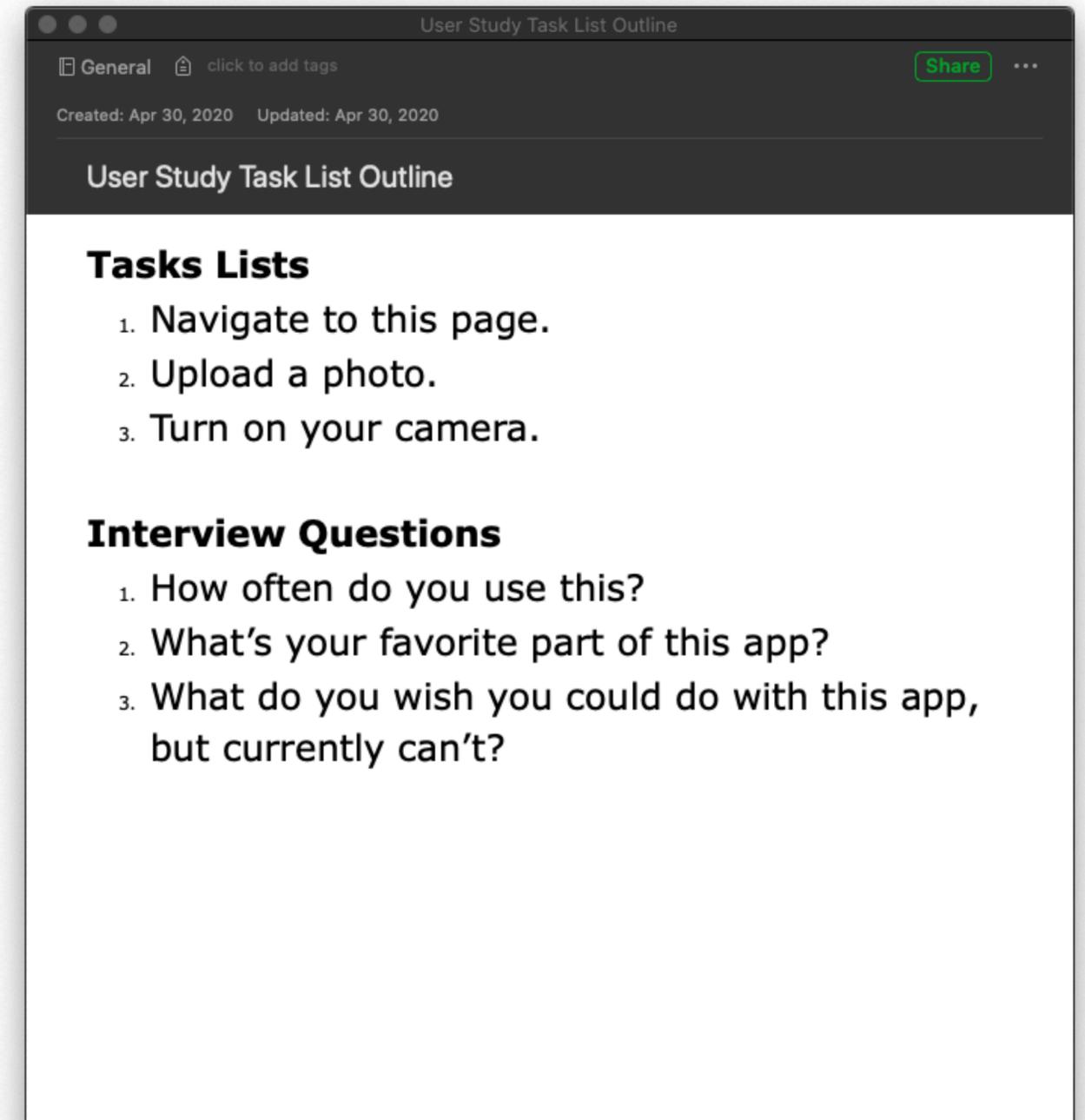
DEFINE YOUR USER ROLES.

- Who interacts with the product, interface, or system?



CREATE YOUR TASK LIST AND QUESTIONS.

- **Build your task list.**
 - **Common tasks per user role.**
 - **Specific workflows to analyze.**
 - **Current v. Ideal workflow.**
- **Build your question list.**
 - **Informal interview questions about use, perceptions, feelings.**



RECRUIT PARTICIPANTS.

- **6-12 users for each user type.**
 - **NNG says 5 users is enough, our experience aligns with this.**
- **Real customers if able.**
- **Online tools to test, recruit if needed.**
- **Voluntary or compensated, differs for each project.**



PREPARE THE LOGISTICS.

- **Collect user info, contacts, availability.**
 - **Airtable, Google Forms, etc.**
- **Choose a remote conferencing tool.**
 - **Record the session, screen share, and camera on.**
- **Schedule your interview.**
 - **Calendar invites, reminder emails, test calls if needed.**



User Interview Candidate

Participation in this usability study is voluntary. All information will remain strictly confidential. The descriptions and findings may be used to help improve a product, service, or software application.

Name *

First and Last

Email *

We will only email you to schedule your session.

Professional Role *

Select which childcare role applies:

- Administrator
- Program Director/Owner
- Personal Professional/Provider

Preferred Interview Time *

Interviews will last about 30 minutes.

- May 20th 6:00 pm
- May 20th 6:45 pm
- May 20th 7:30 pm

DURING THE INTERVIEWS

HOW TO WATCH, LISTEN, AND LEARN

HOW TO WATCH, LISTEN, AND LEARN

- Ditch the lab environment.
- Observe subjects one-on-one.
 - Qualitative > Quantitative.
 - Say “no” to focus groups.
- Watch how they interact with the app.
- Watch their body language.

DURING THE INTERVIEWS

HOW TO WATCH, LISTEN, AND LEARN

HOW TO WATCH, LISTEN, AND LEARN

- **Stop analyzing, stop note taking.**
- **Listen to actions.**
- **Listen to their comments.**
- **Ask the user to narrate their thoughts.**
- **Listen to their tone.**
- **A good UX researcher doesn't like to listen to themselves talk.**

DURING THE INTERVIEWS

HOW TO WATCH, LISTEN, AND LEARN

HOW TO WATCH, LISTEN, AND LEARN

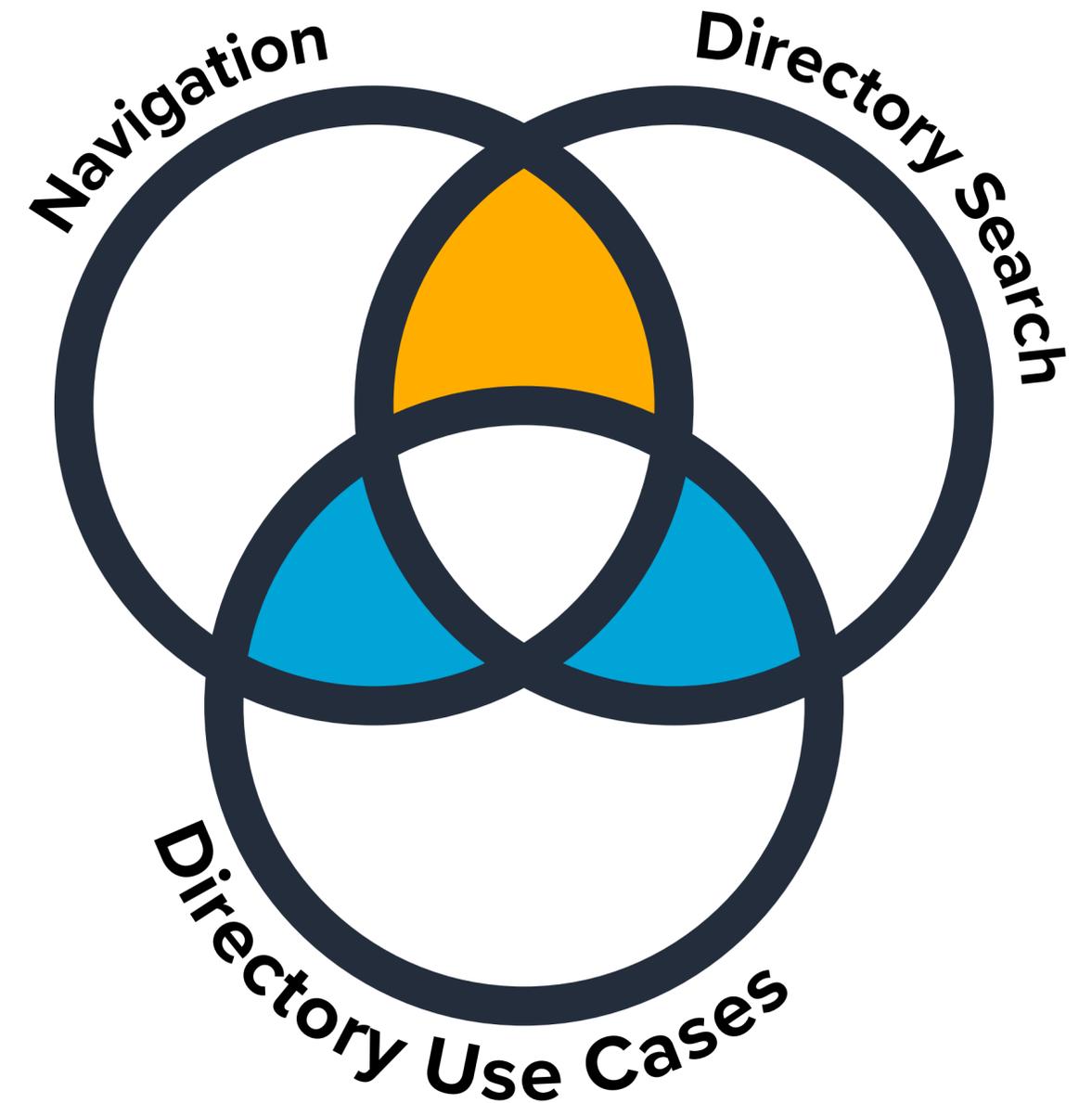
- Learn from other people's experiences.
- Let the user get off task.
- Observe their surroundings.
- Ultimately, keep things informal and relaxed.

AFTER THE INTERVIEWS

COLLECT YOUR OBSERVATIONS

COLLECT YOUR OBSERVATIONS

- Review recordings.
- Make annotated notes + time stamps.
- Group observations by type + category.



Highlight Video Outline

State of NE - NECPRS Research [click to add tags](#)

 2 [Share](#) 

Created: Nov 25, 2019 Updated: Nov 26, 2019

You are viewing a note that is shared with 2 people

Highlight Video Outline

Portal

>6:52 [Erin] - Well, I guess I like it. I like this better than the other page. I think here it's more simplified. Not as much information thrown at you.

>5:19 [Chelsea] - Um, It looks very simple. You get the graphic and the logo at the top, and then I like the blurb of why you have the NECPRS account. Like right where you sign in. I like that the log in and sign up buttons are right there, so you don't have to go and search for them.

>6:26 [Chelsea] - Registering. Oh, I like the finding trainings! That's nice. Now can you click on that without having to log in? Or do you have to sign in?

6:46 [Chelsea] - Oh that's nice. I like that. Oh and recently added - Oh, cool! And it has a scroll option. And then resources. Oh, I like that they are differentiated for users and directors. And tutorials. Account set up video. Oh and the PDF aids.... I think that's good for quick references.

6:52 [Erin] - Well, I guess I like it. I like this better than the other page. I think here it's more simplified. Not as much information thrown at you.

5:34 [Suzanne] - I wouldn't have known to do that, though, without you telling me. It looked like that's all there was. (Not knowing to scroll down)

Onboarding

20:05 [Suzanne] - I think it was fairly easy. I think the last one, where it said "last steps" were you put in the rest of the information, I thought I was going to do that right now. I was surprised that it just finished.

>10:21 [Erin] - I mean it's very streamlined. It looks like it's going to be very streamlined. Like you have the first steps, second step, and just kind of work your way down the checklist. I think it's a little less clunky.

>15:57 [Suzanne] - Do I have to put in the - can I just put in 20, or do I have to put in the whole number in?

>15:28 [Nicole] - Oh is it already pre-filled in here? (In reference to the Program Setup screen)

>18:33 [Nicole] - I know that this is petty, but would those back slashes already be put in there? (Referring to the date fields in program setup)

>11:35 [Nicole] - Um what kind of notifications would I be receiving? (In reference to selecting email or text for receiving notifications from NECPRS)

>20:05 [Suzanne] - I think it was fairly easy. I think the last one, where it said "last steps" were you put in the rest of the information, I thought I was going to do that right now. I was surprised that it just finished.

HEL ? 🔔 👤						
☰ To Do Interview Session Users Initial Observations Initial Conclusions Test User Accounts Tack List 🗑️						
🔍 Main View 👤 🔗 1 hidden field 🔍 Filter 📁 Grouped by 1 field ↕ Sort 🎨 Color 📄 🔗 ⋮						
☐	🔍 What Users Say and Do	🔍 What Users Think	🔍 What Users Feel	🔗 Vimeo Link	🔍 Description	🔍 Specific Scen
FOCUS ▼ Access Count 3						
1	Most users visit the site about once a month.	The don't think the site is useful enough to visit more frequently.	They feel that it doesn't naturally fits into their day to day planning or monitoring.	https://vimeo.com/339881357	Overall, most users access the site about once a month, a pretty low frequency. Those that visit more frequently are faithful users of the training calendar, suggesting that a more effective calendar would increase site usage.	AB - 26:26 Traini time she's logge CP - 25:30 - Pro
2	Site access is multi-step and indirect. Users don't know the URL.	They think it's easier to google NECPRS or access through the Department of Education.	They feel not bothered by these indirect routes, except for those who could not find the site, they felt confused and frustrated.	https://vimeo.com/339879591	Overall the URL is hard to find and remember, which is a challenge since most users access the site infrequently. Some users enter the site through the Department of Education website or Step Up to Quality. Other users google NECPRS, which can lead to wrong results due to typos or users pronounce the...	AB - 0:45 - Unab CP - 4:21 - Acces KS - 04:51 - "Ho there....
3	Site navigation challenges high AND low frequency users.	They think it's their fault that they can't find anything. They think the site is simple enough, if they kee...	They feel frustrated when they don't know where to go. They feel sure they'll find what they're looking for ...	https://vimeo.com/339884562	High and low frequency users alike struggle to navigate the site. They often know what they're able to do within the site, but can't find where they can do it. This results in a lot of clicking around and back and forth. "I haven't been on here in a while" was a frequent response to struggling to navigate the site.	AB - 7:50 - Strug back, clicks "Pro find where to ad haven't been on l
+						
FOCUS ▼ Start Count 4						
4	Onboarding viewed as simple and easy.	They think that it's all general, expected information.	They feel good about the NECPRS system because they were able to successfully and easily get started.	https://vimeo.com/339884898	Some users, mostly directors, viewed the sign-up process as simple or straight-forward. They were able to complete the onboarding all in one sitting or mostly all in one sitting.	EB - 3:35 - Yes. 7 3:55 - Was pretty NW - 04:05 - Th
5	Onboarding completed with help, often included frustrating moments.	They think that it's their fault that they can't complete the process. They think that it was helpful to know what ...	They feel first frustrated that they're unable to complete on their own, then they feel embarrassed about their inability to complete the task on their own....	https://vimeo.com/339886131	Many users didn't complete onboarding on their own. They had help from regional ESU staff (a in home care provider) or they were supervised at work (many personal professional providers at licensed centers). Onboarding can trigger frustrating feelings due to usability challenges like finding a center or ...	AB - 04:00 - Trie later and was abl where the user lc ...
6	Useful to know required information before starting to sign-up.	They think that it's easier to be successful in signing-up if you are able to prepare your materials and mindset ahead of time.	They feel more confident, and less frustrated by starting and stopping if they can properly prepare.	https://vimeo.com/339889608	Knowing what information will be included in the sign-up process ahead of time is considered advantageous. Users that knew ahead of time via their supervisors or hearing from peers, had a smoother onboarding. A director, Suzanne, felt that a checklist of require information would help soon-to-be ...	CP - 5:55 - I did. had a preview of SS - 4:00 -she p
7	A mental "getting started" barrier to NECPRS sign-up exists among user peers.	They think they're still responsible to help their colleagues overcome that barrier because they've found the NECPRS benefits to be worth it.	They feel challenged to help change those mentalities, they feel some are part of a need of a larger paradigm shift.	https://vimeo.com/339889671	Among those interviewed, many mentioned that among their peers, signing-up for NECPRS can be seen as "one more thing to do". Or it can be seen as a challenge because it's a new system to learn. Directors especially feel that helping their staff over come that mentality or scare surrounding new things a...	EB - 27:35 - I thi technical side of things like that. S ...
+						
FOCUS ▼ Manage Count 6						
20 records						

QUESTIONS THAT GUIDE OBSERVATIONS

What did users say versus what did they do?

Where did they struggle? What came easily? Shortcuts? Long form?

Any improvised workflows?

Note their setup. Desktop? Tablet? Dual screens?

The observation that matters most: Could they complete the task?

**BUILD A SUMMARY OF OBSERVATIONS AND
HIGHLIGHT REEL.**

SUMMARY AND HIGHLIGHT REEL

- **Summary observations serve as roadmaps for developing feature sets and workflow.**
 - **Build a highlight reel with potent clips from user studies.**
 - **Group clips built around an observation.**
 - **Ex: People struggle with a key application task.**
 - **Highlight reel forms buy-in from clients and team members.**
- Watching users struggle gets everyone on the same page.**

EXAMPLE SUMMARY OBSERVATION

Overall, users have an overwhelming support of the system and its goal - so much so that they're willing to learn/live with the system's quirks.

However, even though they say they love the system, they don't use it for its core purpose like finding trainings or managing employee records. They often create their own systems.

Manual Systems for Tracking Hours

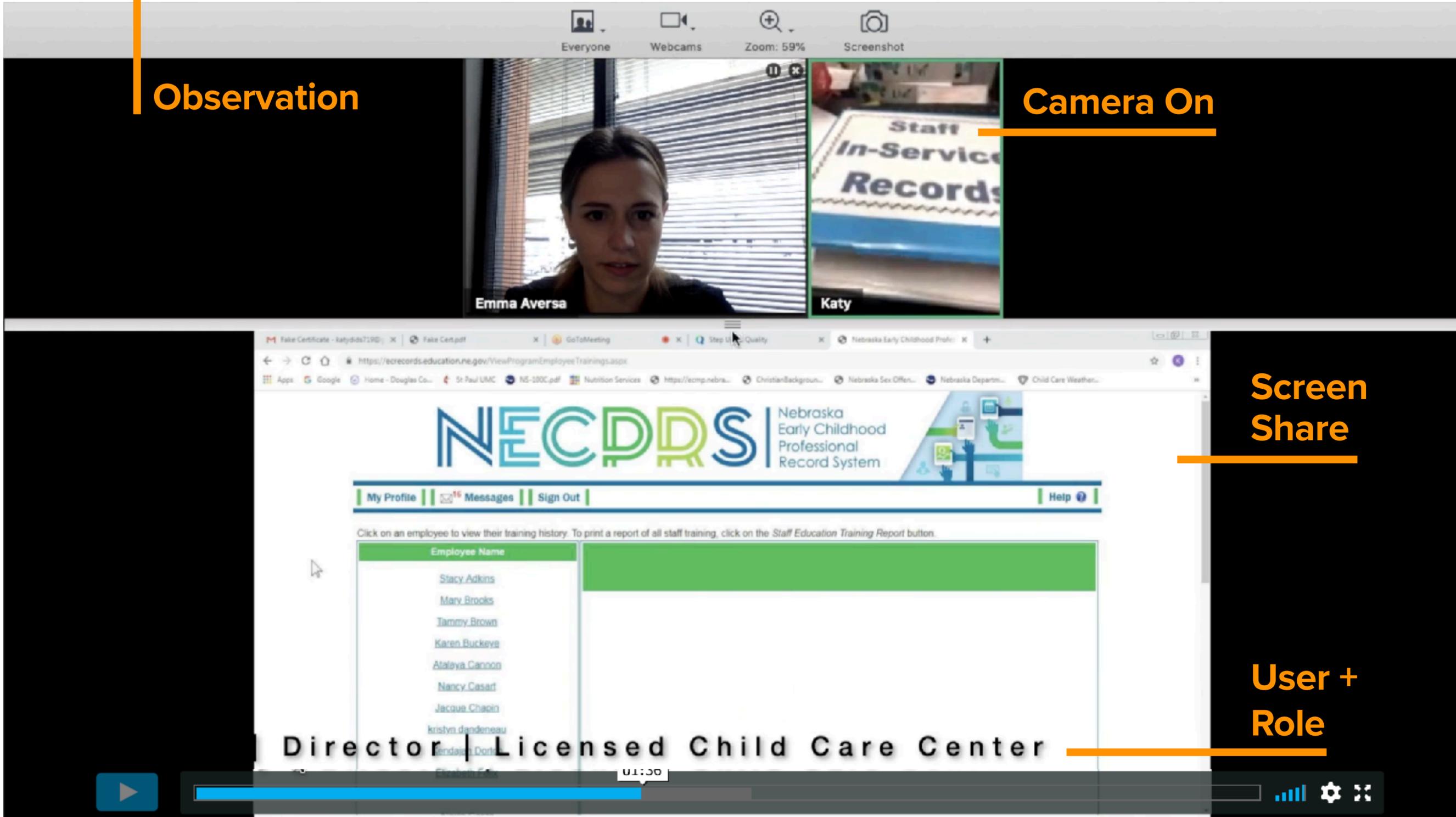
Observation

Camera On

Screen Share

User + Role

Director | Licensed Child Care Center



WHY USER STUDIES WORK

WHY USER STUDIES WORK

- **Save money in the long run.**
 - **You solve the right problem.**
- **Build user loyalty.**
 - **Product fits their needs. Positive brand association.**
- **Makes the design process more productive.**
 - **Observations to back design decisions and directions.**
 - **“I think” replaced with “We’ve observed”.**

REBUTTAL POINTS

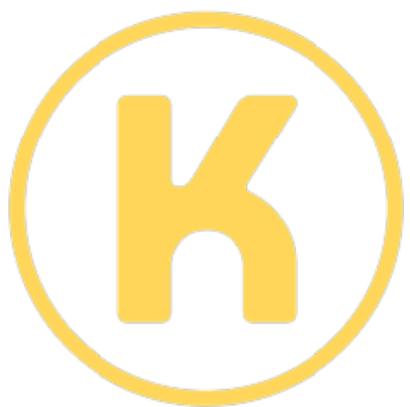
REBUTTAL POINTS

- **“We know our users.”**
 - **Every time we run a user test, we discover something important that none of the stakeholders knew about their users.**
- **“We don’t have time.”**
 - **You’re talking about a couple weeks before embarking on a year long development project.**
- **“We don’t have the budget.”**
 - **See the above.**
 - **What does it cost to build the wrong product?**

SOME OF OUR EUREKA MOMENTS

- Subject mixes up similar looking devices after removing from packaging.
 - Two CE products were so similar looking that consumers could not differentiate them after removing them from the package.
- Subject starts a task and then gets up to get more coffee.
 - Product responsiveness was so poor that users expected to wait minutes for simple tasks to complete.
- Subject glares at you with a furrowed brow and tells you “...this fucking system makes me feel stupid ...”
 - Product was so difficult to use people were using Excel and then pasting results back in.

THANK YOU



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