UXPin

Practical User Research for Enterprise UX

Get Buy-In, Conduct, and Document User Research

by Rian van der Merwe

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Author

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The Adversity of Enterprise Design

The most difficult environment in which to innovate is in a large enterprise. Unfortunately, we can’t pinpoint one simple explanation for why large, established companies generally struggle to keep up once leaner competitors enter the market.

From a design perspective, the story is usually the same.

Once a company grows over a certain size, the internal politics and number of people involved in every decision increase so much that it becomes virtually impossible to stay focused on fulfilling user needs and business goals. Instead, the focus turns inward to the opinions and whims of individuals inside the company. Add in the complexity of designing B2B products into the mix and, well, things go bad very quickly.

You probably know where I'm going with this. I'm setting the stage to talk about the importance of user research in enterprises.

When an abundance of stakeholders are involved in a product, user research is the only way to focus a whole team on the real needs and goals required for success. It's also the only way to get people out of the habit of thinking "Well, *I* want this, so everyone else must want it too" – a view that I find much more common in enterprises than in smaller organizations.

But I'm not going to spend the entire time discussing why enterprises need user research – my guess is that if you're here, you already know why. No, instead I want to get really practical.

First I'll talk about why it's often so hard to get support for user research in enterprises. Then I'll provide some advice on how to sell the value of user research in enterprises. Finally, I'll offer some practical tips for addressing the subtle differences of conducting research in larger organizations with users who aren't buyers.

Let's get started.

Why It's Hard to Get Support for Research in Enterprises

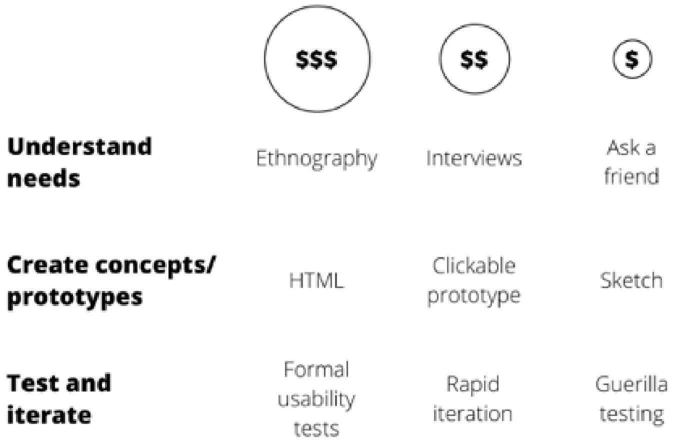
Before we can solve the problem of increasing adoption for user research in enterprises, we need to understand why it's so difficult to get there in the first place. We first need to address the widespread incorrect assumptions and perceptions about user research.

Time and Budget

The first major concern we often encounter is around time and budget.

In short, there is a strong perception that research will take too long and cost too much. This is where it's important to highlight one of the best qualities about user research: it shrinks to fit. If you don't have a lot of time or budget, you can still follow a scaled down version of each of the steps in the process.

Can't do an ethnographic study? Do some phone interviews. Can't build out a full HTML prototype? Make a clickable prototype in a collaborative tool like UXPin, or heck, make a paper sketch. Can't do a full usability study? Go to Starbucks and ask someone if you can buy them a coffee in exchange for some feedback.



	$$$	$$	$
Understand needs	Ethnography	Interviews	Ask a friend
Create concepts/ prototypes	HTML	Clickable prototype	Sketch
Test and iterate	Formal usability tests	Rapid iteration	Guerilla testing

Another effective way to address budget and time concerns is to flip the worry on its head. Instead of answering the question "What do we gain if we do this research?", ask instead "What do we stand to lose if we don't do the research?"

It can be a scary thought exercise to discuss with a team the many ways a product can fail if they build something without the data required for good decisions. Because that's the crux of it: the danger of not doing research is building a product that isn't useful or usable, and that becomes a very expensive mistake (remember Color?).

You can also discuss past projects where research wasn't included. It's usually not difficult to find an example of a product where the organization didn't have time for research (you'll often find they had time to do it all over when it failed, but that's a topic for a different article).

That brings us back to a common theme: it's very expensive to build products without research. The time you "save" from skipping the research phase almost always comes back to bite you 10 times over.

Legacy Thinking

Another unfortunate side effect of working in large organizations is an abundance of legacy thinking. You might find waterfall processes masquerading as “agile,” well-established and well-defended functional silos, and many layers of bureaucracy. The result is something Jon Kolko sums up well in Dysfunctional Products Come from Dysfunctional Organizations:

The dysfunction in the organization becomes the dysfunction in the product, and that gets passed on to the customers.

The side effect of this dysfunction is that it leaves no room for research. Product roadmaps get decided by “the bureaucracy”, and unfortunately few leaders practice what Clayton Christensen calls discovery-based planning:

Discovery-based planning suggests that managers assume that forecasts are wrong, rather than right, and that the strategy they have chosen to pursue may likewise be wrong.

Investing and managing under such assumptions drives managers to develop plans for learning what needs to be known, a much more effective way to confront disruptive technologies successfully.

Product Myopia

The biggest danger for a product person is to assume they know the needs and behaviors of end users when they don’t. It’s very convenient to see oneself as a user of the product and make WWID ("What Would I Do") decisions, but that kind of thinking leads down a path of myopia resulting in products that don't meet user needs.

The other part that's especially a problem in enterprises is that everyone on the team holds a different idea of what the product should do. Without a shared understanding of user needs, progress often grinds to a halt once meeting after meeting takes place to reach a mythical "alignment" that never comes.

Erika Hall sums up the role research can play in solving this issue in The Secret Cost of Research:

The reason design projects that neglect research fail isn't because of a lack of knowledge. It's because of a lack of shared knowledge. Creating something of any complexity generally requires several different people with different backgrounds and different priorities to collaborate on a goal. If you don't go through an initial research process with your team, if you just get down to designing without examining your assumptions. You may think your individual views line up much more than they do. Poorly distributed knowledge is barely more useful than no knowledge at all.

Once again, we turn to research as the only consistent antidote to making product decisions based on incorrect knowledge or assumptions.

Conclusion

Over the years several myths have developed about the supposedly negative consequences of research, particularly in enterprise environments.

Some of these myths came about because people got exposed to bad research methods, others don't seem to have any logical origin at all. But whatever their origin, it's up to us to bust these research myth with facts and solid methodology.

How to Sell the Value of User Research in Enterprises

There are three major benefits of incorporating research into enterprise development cycles:

- Increased revenue
- Reduced cost
- Faster development cycles

I am yet to meet a stakeholder whose eyes don't light up at the sound of those magic words. The difficult part isn't in convincing them that more money is a good thing. The difficult part is convincing them that research can play an essential role in bringing in more money.

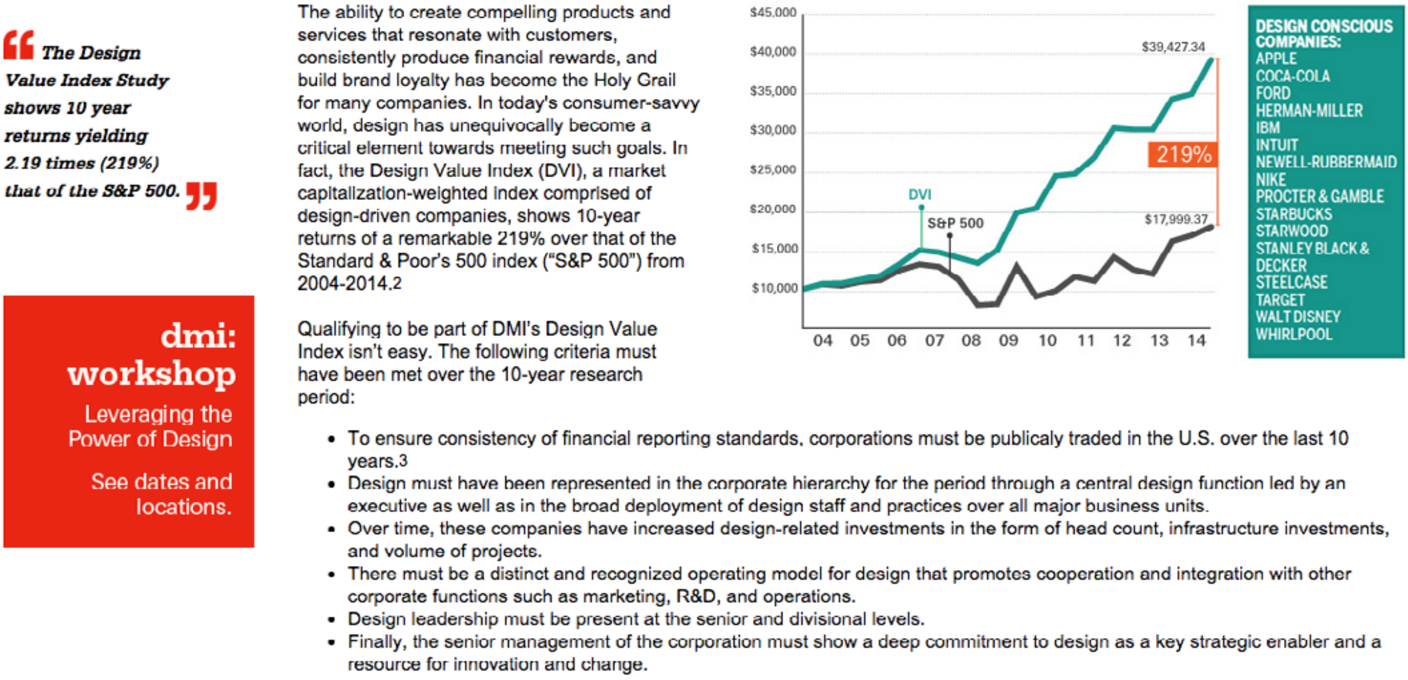
Let's look at how to do that.

Increased Revenue

The 2014 Design Value Index showed something quite compelling about design-led companies:

> The Design Value Index (DVI), a market capitalization-weighted index comprised of design-driven companies, shows... 10-year returns of 219% over that of the... S&P 500 from 2004 - 2014.

This chart puts the findings into perspective to show the exact benefit of being a design-driven company (with research being a core component of being design-driven).



“The Design Value Index Study shows 10 year returns yielding 2.19 times (219%) that of the S&P 500.”

dmi: workshop

Leveraging the Power of Design

See dates and locations.

The ability to create compelling products and services that resonate with customers, consistently produce financial rewards, and build brand loyalty has become the Holy Grail for many companies. In today's consumer-savvy world, design has unequivocally become a critical element towards meeting such goals. In fact, the Design Value Index (DVI), a market capitalization-weighted index comprised of design-driven companies, shows 10-year returns of a remarkable 219% over that of the Standard & Poor's 500 index (“S&P 500”) from 2004-2014.2

DESIGN CONSCIOUS COMPANIES:
APPLE
COCA-COLA
FORD
HERMAN-MILLER
IBM
INTUIT
NEWELL-RUBBERMAID
NIKE
PROCTER & GAMBLE
STARBUCKS
STARWOOD
STANLEY BLACK & DECKER
STEELCASE
TARGET
WALT DISNEY
WHIRLPOOL

Qualifying to be part of DMI's Design Value Index isn't easy. The following criteria must have been met over the 10-year research period:

- To ensure consistency of financial reporting standards, corporations must be publicaly traded in the U.S. over the last 10 years.3
- Design must have been represented in the corporate hierarchy for the period through a central design function led by an executive as well as in the broad deployment of design staff and practices over all major business units.
- Over time, these companies have increased design-related investments in the form of head count, infrastructure investments, and volume of projects.
- There must be a distinct and recognized operating model for design that promotes cooperation and integration with other corporate functions such as marketing, R&D, and operations.
- Design leadership must be present at the senior and divisional levels.
- Finally, the senior management of the corporation must show a deep commitment to design as a key strategic enabler and a resource for innovation and change.

Photo credit: The Design Management Institute

Notice how the top companies don’t just include the expected consumer companies like Apple and Disney, but also software enterprises like IBM and Intuit.

Reduced Cost

So we know design-led companies make more money. But is it also possible for design to save on development costs?

As explained in the book Software Engineering: A Practitioner’s Approach, for every dollar spent making changes in design, it costs $6 in development and $100 after launch.

This quote from Marty Cagan also makes the point really well:

> Instead of using one prototyper for a few weeks, [many companies] use the full engineering team for full release cycles to build the software that is then QA'ed and deployed into production systems. This is why it typically takes so many companies three or more releases over one to two years to get something usable and useful. They are using the engineering organization to build a very, very expensive prototype, and they use their live customers as unwitting test subjects.

Research allows us to validate product concepts before they go live, and that saves a ton of money.

I was once involved in an agency project where we pitched on a website redesign. We included a prototype usability testing phase in the proposal, but the company wanted to cut costs so they asked us to remove that phase. As a user-centered design agency, we knew that would only set us up for failure, so we declined to proceed with the project. The company hired a digital marketing agency instead.

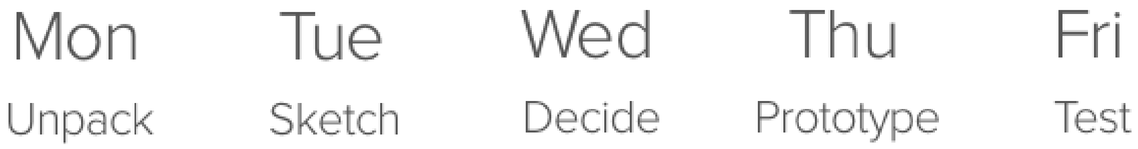
About 9 months later, I received another email from the company. The site went live, it didn't work well, and they now had to redesign the redesign at great expense. This time, they were happy to include research in the process, because they felt the pain first-hand.

The stakeholders learned the hard way that a little bit of extra cost upfront in user research would have saved them months of expensive work.

Faster Development Cycles

This issue is related to “time and budget” concerns, but it deserves a separate call-out. Developers and even fellow designers will often complain they don’t want to do research because it will “slow down development”.

I’ll say this categorically: if research slows down the development process, you’re doing it wrong. One of the main goals of research is to speed up the right development by moving most of the crucial product decision earlier in the cycle.



Mon	Tue	Wed	Thu	Fri
Unpack	Sketch	Decide	Prototype	Test

If a project proceeds without research, the UI/visual design phase might appear to proceed really fast, but this is an illusion. The process slows down significantly once PMs write the specs and/or development starts. Suddenly tons of questions and opinions pop up about everything from crucial concepts like user flows to trivial issues like whether the PM likes yellow or not.

With a proper research phase, all those arguments happen much more efficiently, and much earlier in the process. People realize the issue isn’t whether they like yellow, but whether yellow helps users accomplish their tasks. Flows are validated with users, so less opinion-based arguments arise. And on and on it goes – a research phase essentially shortens the amount of time spent on product arguments, and it makes the (legitimate) arguments more efficient.

Conclusion

As UX people we tend to spend a lot of time trumpeting the user-centered benefits of research – better understanding of user needs, better products, etc. Those are fantastic things, but we sometimes forget that research has real, measurable business benefits as well.

My hope is that this section helps you to communicate those benefits much more clearly to those who are able to provide the budget and time needed for research.

How to Get the Right Support

It's all well and good to have a good argument for why research is important, but that means nothing if you don't know who to convince to make it happen.

The most effective way to get research fully incorporated into the organization is to start small and slowly grow it out. Start by feeling out the product managers – who has a background in user experience design, who has been asking for research, who has a small, contained project coming up that's a good fit for research, etc.

Once you know who to talk to, present your case like you would present your research – methodical, and focused on the needs of the audience. A general structure that works well for me is as follows:

- Start with the outcomes – what the company gains from the research. Explain how research feeds into the magic works we discussed above: increased revenue, reduced cost, and faster development cycles.
- Move on to explain how research is closely connected to those outcomes. Use research and theory but also industry examples like the ever-present story of the $300M button.
- Show some existing projects that suffered from skimped on user research.
- If possible, show proof from a small internal project where research was included.
- And as a final kicker, bust some of the myths around research – especially the time/budget thing – and present a plan for how to incorporate research into the development process.

It's very important to follow up after the project and show the impact of the research.

Make this part of the research report (more on that in the next section), and make sure the entire product team knows about it. This is not the time to be seen and not heard! No, this is your chance to go with the product manager to talk to their manager (do it together – you're a team, after all) to get the wide-spread research adoption the product and its users deserve.

Field Tips for Enterprise User Research

If you’ve made it this far into the process, you’re in good shape and on your way to do some meaningful research.

But don’t rest yet – the battle isn’t over. Large enterprises bring with them some unique challenges when conducting user research, so I wanted to end with a few focused tips for addressing those nuances. The last thing you want is to get approval for research and then end up with unusable data.

Plan for Users Who Aren’t Buyers

First, users and buyers are not the same people – and their needs couldn’t be more different.

Company leaders who buy software care about things like control, configurability, compliance, and the number of features. In contrast, the people who use software every day only care about one thing: getting stuff done effectively. And if they can’t do that, a really ugly death spiral happens. As more people realize they can’t get anything done with the software, fewer people want to use it, until eventually no one uses it any more.

That's why it's so important to do research with end users as well as buyers. It's tempting to focus just on buyers because that's where the money comes from. But there is a grave danger in not focusing on end users as well. Since they use the product every day, their satisfaction is an important driver for product renewals.

The way to access these end users is *not* through the buyers themselves. The way to get to end users is to seek out and form a relationship with the people and teams who are responsible for implementing the software once it's bought. Offer to sit with them as they go through an install, or simply give them your email address if they have questions (and help them when they *do* have questions!). These are the people closest to the ground, and they usually care a great deal about the success of their users. I've never heard an IT manager (or similar) decline a request to spend time with some of their end users.

It doesn’t help if your company does an amazing sales job, but end users are so unhappy that the accounts don’t get renewed after the first year. Seek them out.

Write a Concise User Research Plan

I’ve given up on writing long research plans for stakeholders to approve. They just don’t read them (would *you* read them if you didn’t have to write them…?). Instead, I write a short one-page online document from a simple template with a few key sections:

- **Background**. This includes any background documentation about the project or the team, or sometimes just a single sentence to set the stage, such as “We'll be doing 1:1 usability testing on the […] application the week of March 7th in the Palo Alto office.”
- **Methodology and Schedule**. This is a brief explanation of the methodology (what kind of research, how many users, the target market, the location) and a table with the schedule that fills up as users are scheduled. This gives stakeholders an opportunity to come back to the same place to see the progress of the planning.
- **Goals (overall and specific)**. This sections is a brief overview of what the study will cover, and serves as a good outline for the research script for when the time comes to write that.
- **Outcomes**. Very importantly, this states what we will “get” from the research. For me, it usually includes 3 statements:
  - A prioritized list of recommendations to improve the usability of the application.

- Product recommendations to increase the utility of the applications.
- Product Marketing recommendations to help overcome possible barriers to adoption.

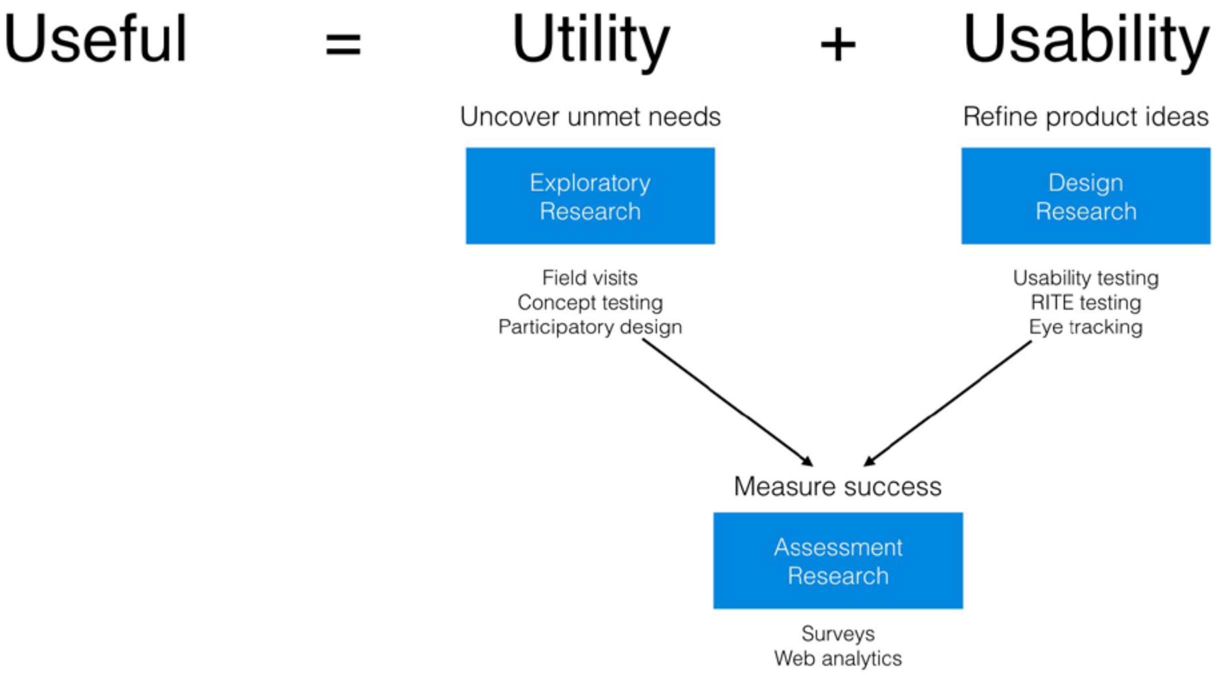
This is a short document, but it allows everyone in the organization to comment on and eventually agree on the purpose of the research. This not only helps with script writing for interviews and usability tests, it also ensures that no surprising assumptions from stakeholders will surface later on when the research is all done.

You can actually get a user research report template (along with 5 other useful user research documents) in this free usability test kit.

Focus on Core User Research Methods

As is often the case, it's useful not to throw All The Research Methods at a problem. Too many data sources can be as confusing as too few, and you also don't want teams to feel overwhelmed by all the different ways you're collecting data. Even though you can expand later on, my advice is to start enterprise research with two primary methods, both linked to the age-old Useful = Utility + Usability equation.

I usually employ the slide below to explain the difference between utility and usability, and what role research plays in understanding each of those concepts. In particular I explain that utility research aims to **uncover unmet needs**, which is where all the best product ideas come from, whereas the goal of usability research is to **refine product ideas** until they're the best they can be.



For this reason I recommend the following research methods as low-friction starting points for enterprise UX research:

1. Ethnography to uncover unmet needs.
   There is simply no better method to build empathy for user problems than interviewing users in person, in their natural context.

   Whether that's at work or in their homes, these interviews are hugely beneficial at the start of a project to understand the users you're making the product for, and what they might need from the product. Practical Ethnography and Talking to Humans are great places to start on the basics of ethnography.

2. Traditional usability testing to refine product ideas.
   This is still the most solid method we have to systematically improve the user experience of an existing prototype or product.

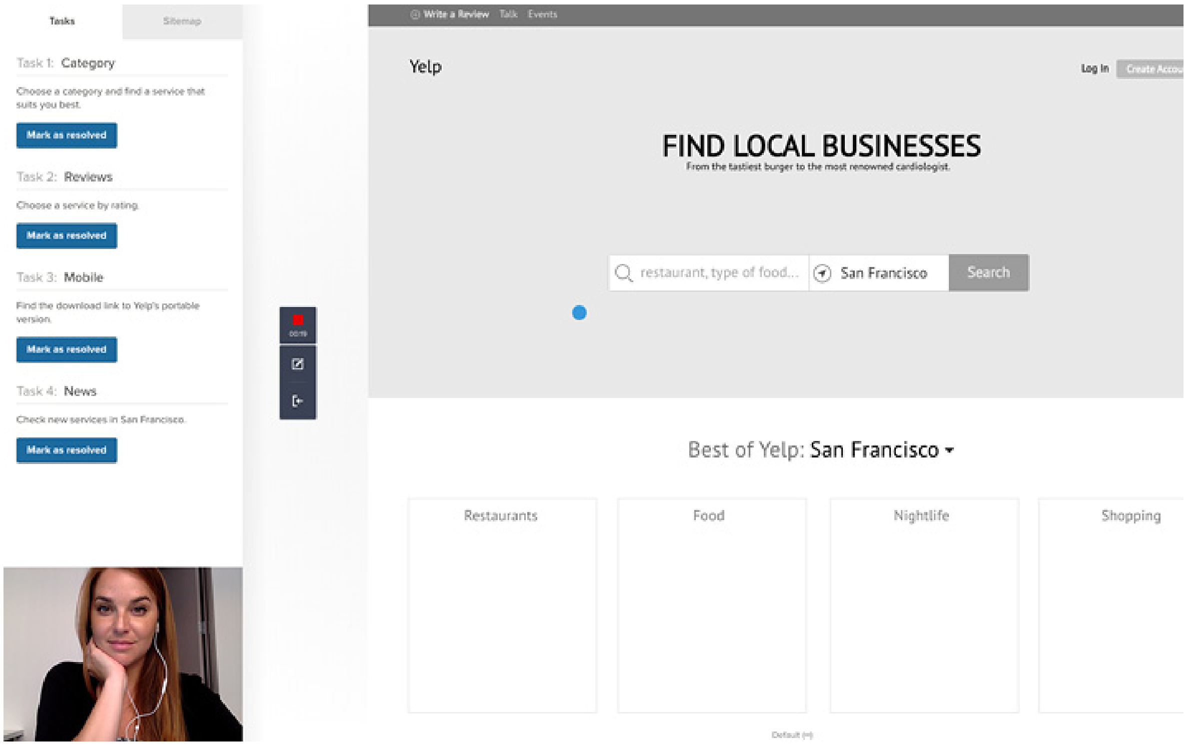
   As much as remote testing is becoming popular, I'm still a big fan of in-person, moderated usability testing. This allows for much more in-depth discussions and unexpectedly useful deviations from the script. It also enables researchers to ask some general interview questions to help shape the direction of the product.

   For in-depth tips for ethnography and usability testing, you can check out UXPin's free 100-page Guide to Usability Testing.

Record and Document Your Sessions for Better Collaborative Analysis

It's common for project teams to be very large (8 or more people) in enterprises. This can be a problem – even if everyone is bought into the idea of research – since you can't take 8 people with you on every study.

It's important to keep everyone involved in the process throughout, which means you need a good plan for recording and viewing research sessions. Sometimes this means physical recording of screens and devices (I've written about this before in the technical guide to mobile usability testing), and sometimes it means taking really good notes.



Tasks

Task 1: Category

Choose a category and find a service that suits you best.

Task 2: Reviews

Choose a service by rating.

Task 3: Mobile

Find the download link to Yelp's portable version.

Task 4: News

Check new services in San Francisco.

FIND LOCAL BUSINESSES

From the tastiest burger to the most renowned cardiologist.

Best of Yelp: San Francisco

Photo credit: Usability Testing in UXPin

I haven't seen a lot of articles on how to take good research notes (especially when you're on your own), so let's dig into that a little bit.

The ideal situation for any qualitative research project is for the facilitator to rely on someone else to take notes. That way, the facilitator focuses all their attention on the participant. This holds true for contextual inquiries, in-depth interviews (IDIs), as well as usability tests. However, sometimes it's just not possible to have a separate note-taker on a project. In those cases the interviewer has to take their own notes – but that can be distracting and terribly inefficient.

So, what's the best way to be your own note-taker?

I've seen interviewers taking their own notes in a variety of ways, but the inherent flaws in each approach has always made me uncomfortable. Some interviewers use their laptops to make notes during the interview. This is very efficient (there's no transcribing afterwards), but the clicking of the keyboard can be distracting and off-putting to the participant.

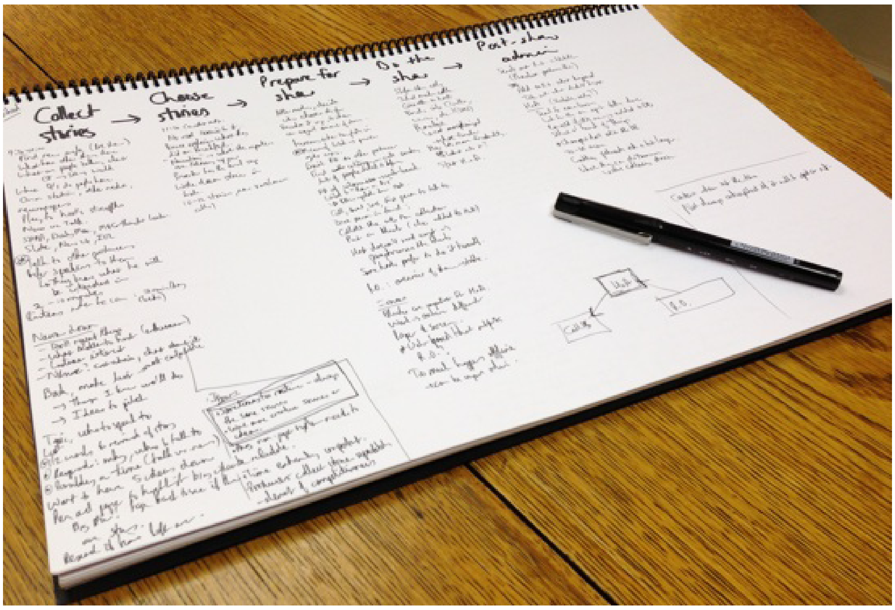
Others print out their interview scripts and leave blank spaces for writing notes about each question. The problem here is that scripts are fluid. You sometimes skip over questions, while other times you go off on an important tangent that isn't covered in the script. So you tend to end up with empty spaces and cramped notes, all spanning multiple pages. Not ideal.

I recently worked on an enterprise project to make it easier for talk radio producers to do their jobs better. As a first phase, we did a bunch of in-depth interviews with producers – and I had to take my own notes. So I decided to try a new approach, and I now take all my notes this way.

I started the project with a long, free-form interview with one of the project leads to develop a generic user journey for producers. I looked for common elements that remained constant regardless of the process each producer might use to perform their tasks, and used that to build a basic journey model for talk radio production. It's not a full-on journey map, just a list of steps that all producers have to complete when they put on a show.

I then created an A3 sheet (6.5 x 11.7 in) for each interview, consisting of the participant's name, time slot, and the headings for each of the steps in the journey. While conducting the interview I filled out any insights that came out for each of the steps – as we worked our way through the script.

Here's an example of what a sheet looked like after an interview:



I discovered that this approach has several advantages over other note-taking methods I've tried:

- **It's script-agnostic**. The interview questions address each of the steps in the journey, but I don't have to stick to it religiously – it's ok to jump around and make notes in a different column if needed.
- **Everything is on one page**. This not only makes note-taking more efficient, but it also makes the analysis phase easier. I'm able to lay out the sheets on a table and see all the data in one place as I start the affinity diagram process.
- **It makes me a better listener**. I was worried that the note-taking would be distracting to participants, but I found the opposite to

be true. By taking notes while we talk (and looking them in the eyes when I'm not writing), participants could tell that I'm really listening to them – not just pretending. And this made for much better interviews

- **It's a good artifact**. By adding photos of the notes to a report (or passing the notes around) stakeholders can see the raw data in an easily consumable format, which increases their confidence in the findings.

I'm sure this method of note-taking isn't perfect, but I'm quite happy with how it turned out, and I hope you find it useful too.

Always Show Your Work

Third, I've found that how you analyze and present results in the most effective way is different in enterprises than in smaller companies.

In smaller startup environments, the product team usually has very little need for "reports". Researchers just work directly with product managers and their teams to make improvements. But in enterprises, it's not that simple.

The most important tip I can offer is to show your work.

No matter how bought in the organization is on the need for research, a level of skepticism will remain – especially if they don't like what the results are saying.

- Always begin reports with some background. Reiterate some of the reasons why research is important.
- Show photos of the participants, videos of their most poignant statements, and definitely show your affinity diagram process (before and after whiteboard shots work really well).

All of this fulfills a simple goal: to show you're not just randomly pulling "actionable findings" from a black box. Once people see the methodology and science behind research, they'll be much more receptive to the insights.

Conclusion

User research is an immensely valuable tool to improve an enterprise product's user experience and business value. For some reason many enterprises have unfortunately lost sight of this fact, and research got a bad name.

My hope is that this quick guide will help my fellow frustrated UX-ers make some headway in their organizations to prove the value of research and restore it to its rightful and important place in the product development lifecycle.

Now it's your turn to go forth and research. Base your arguments for user research in the three points of business value we described, and remember to start with simple research methods to show quick wins.

As you build momentum with each incremental result, your organization will become much more open to a thorough research-driven product development process.

If you found this guide useful, feel free to check out the below case study by UXPin on collaborative design in the enterprise.

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ENTERPRISE

UXPin Enterprise Case Study

UXPin Surges Enterprise Design Productivity by 60%

The Challenge

CHECK24.de is a leading German shopping comparison site with over 700 employees. Their customers include consumer end-user as well as merchant partners.

To date, more than 15 million contracts with leading insurance companies, banks, energy companies, telecommunications and travel agencies have been made with CHECK24's support.

With such a robust and active portfolio of partners, speed is of the essence for CHECK24's large product team. The time to market for new offers needs to be lightning fast, but also accurate and easy to understand.

For Ingrid Brummer, a product manager for the travel sector, this means being able to move from product idea to web property quickly, which has always been challenging as a non-designer.

The solution

Brummer turned to UXPin, a collaborative platform created by designers for non-designers and designers alike.

UXPin makes wireframing and prototyping accessible to everyone involved in the design process, meaning there is no more wasted translation time moving from a product manager's thoughts to a designer's vision. As a result, the user experience can be created quickly and integrated into product development from the very first step.

> "It was so simple to get started on UXPin," Brummer said. "Now I use it daily with my team and manager. I really appreciate that as a non-designer, UXPin helps me to produce really exact designs. I don't have to 'scribble' my ideas. I can really bring them from my mind 'onto the screen'."

The results

Using UXPin has boosted productivity and results for Brunner and her product team. They have:

- Achieved a **60% increase in productivity**, moving faster from idea to design to product.
- **Doubled visibility**, making the design process transparent to all members of the team, whether technical or not, and avoiding unforeseen roadblocks along the way.
- **Halved time to market,** meaning more products on the site, more revenue, more happy partners and even more happy end-users.

Want UXPin to help your product team design collaboratively? Check out the Enterprise Plan to learn more.

UXPin

ENTERPRISE

✓ **Create and Collaborate.**
Translate requirements into product features that resonate with customers.

✓ **Simplify your Process.**
Centralize projects and people into one clear workflow.

✓ **Empower your Team.**
Guide creativity with a common design language.

Take a look