

## CONDUCT UX RESEARCH & TEST EARLY CONCEPTS

MODULE 1 - Planning UX Research Studies

MODULE 2 - Conducting research with Usability studies

MODULE 3 - Analysing and Synthesizing Research Results

MODULE 4 - Sharing research insights for better designs.

### MODULE 1

Research Study : A step-by-step examination of a group of users and their needs, which adds realistic context to the design process.

Four Steps :-

1. Plan
2. Research
3. Synthesize / Analyze
4. Share.

Usability study : A research method that assesses how easy it is for users to complete core tasks in a design.

Types of test phase research :-

- UAT (User Acceptance Testing)
- QA (Quality Assurance Testing)
- Accessibility Evaluation

## Elements of UX Research Plan

- \* Project Background ✓
- \* Research Goals ✓
- \* Research Questions ✓
- \* Key Performance Indicators (KPIs) ✓
- \* Methodology ✓
- \* Participants
- \* Script.

### Importance of Research Background :-

- Gets the team on the same page at the beginning of the study.
- Shows you understand why you're doing this research.
- Promotes confidence in the overall quality of your analysis and insights.

### How to Write project Background :-

- Identify the signals that indicated research was necessary.
- Describe any previous research
- List insights the research will generate.

Foundational Research Goal - Understand why or if you should build the product

Design Research Goal - Understand how to build the product.

Post - launch Research Goal - Understand if the product worked as expected.

RESEARCH QUESTIONS guide research.

Properties

- Actionable
- Specify
- Avoid leading questions

KEY PERFORMANCE INDICATORS :-

Critical measures of progress towards an end goal.

- Time on Task
- Use of navigation vs search
- User error rates
- Drop-off rates
- Conversion rates

1. Time on Task - How long it takes for a user to complete a task.
2. Use of navigation vs Search - The no. of people who use a website / app's navigation compared to the no. of people who use search functionality.

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## METHODOLOGY :-

The steps you take to conduct your research.

## PARTICIPANTS :-

- \* Characteristics
- \* Screening Survey
- \* Incentive
- \* Diverse Perspectives and Abilities.

The goal of usability study is to collect honest feedback from the users, gather data from a really diverse perspectives

## SCRIPT / DISCUSSION GUIDE :-

Importance :- 1) We don't forget any instructions

### Getting Started

- 1) Welcome Participants
- 2) Thank participants for their time
- 3) Get consent to record
- 4) Learn the participant's basic information
- 5) They are not being

### Usability Tasks

- 1) Based on research goals
- 2) Specific
- 3) Make participants take action
- 4) Avoid providing clues on how to complete the task

tested.

## Conclusion

- 1) Ask clarifying questions
- 2) End the recording
- 3) Thank the participant.

★ Why is it important that you keep user data private?

- Right thing to do
- Privacy laws and ethics
- Risk of Hacking
- Protecting your company's brand

Types of data to be protected:-

\* Personally identifiable Information (PII)

Specify details that could be used to identify a user:-

- Name
- Home - addresses
- Email - addresses
- Phone numbers.

\* Sensitive Personally Identifiable Information (spII)

Data that if lost, compromised, or stolen, could cause your users financial harm.

embarrassment or discrimination.

- Social Security numbers → Criminal History
- Driver's license → Medical Info.
- Passport numbers → Disability Status
- Financial Account Numbers → Gender
- Date of Birth → Sexuality
- Race

### PRACTICES :-

- Be transparent about data collection
- Only collect user data that's absolutely essential.
- Get active Consent.
- Detail how you'll use participants info & protect privacy.
  - Allow users to withdraw
  - Inform users who will have access to their data.
  - Explain how you plan to store and delete user's data.

Vulnerable Population :- Groups of people who have limited ability to provide their consent / have special privacy concerns.

## Concerns :-

- Data Recording
- Data Storage
- Data Retention

## DE - IDENTIFICATION & NON-DISCLOSURE AGREEMENT (NDA)

## MODULE - 2

**USABILITY STUDY** :- A research method that assesses how easy it is for participants to complete core tasks in a design.

Step 1: Planning the study

Step 2: Conducting the research

Two types of usability studies

→ Moderated : A moderator guides participants through the study in real time.

→ Unmoderated : Participants test out the prototypes without human guidance.

### MODERATED :-

- Benefits → Guide the participant through the study.
- Ask specific questions & follow up in real time
- Rapport building between the moderator and

## Participants

- Limitations → Moderator could influence or bias the participants
- Less Flexible → Participant may not identify with the moderator.

## UNMODERATED :-

- Benefits → Participants uses the product in the real world.
- Participants complete tasks on their own time and in their own space.
- Participant may feel more comfortable giving feedback without others around.

Limitations → No human guidance if issues arise

- No real time follow up questions
- Little to no control over the environment.

## HOW TO BEGIN A MODERATED USABILITY STUDY :-

- 1) Build a rapport with participants
- 2) Thank participants for coming
- 3) Remind participants to be open & honest.
- 4) Have participants sign NDA (paperwork)
- 5) Explain the focus of the study and what participants will feedback on.
- 6) Establish ground rules for the study

- 7) Remind participants that they are not being tested.
- 8) Keep your emotions neutral.

### MODERATING A USABILITY STUDY :-

- Ask open-ended questions.
- Ask follow up questions
- Summarize their answer for confirmation.

### BEST PRACTICES :-

- \* Get comfortable
- \* Put people first
- \* Don't skip the paperwork
- \* Communicate clearly
- \* Ask the right questions.

### Biases that affects the Research as moderator:-

- Implicit / Unconscious bias
- Serial Position Effect
- Friendliness Bias
- Social Desirability Bias

### HOW TO REDUCE BIAS WHEN CONDUCTING USABILITY STUDIES :-

- \* Identify and admit your own bias
- \* Find participants from a

representative sample.

- \* Define the research criteria beforehand.
- \* Phrase interview questions thoughtfully.
- \* Let participants express themselves fully and in their own words.
- \* Be mindful of your body language.

### NOTE TAKING METHODS :-

Why take notes?

- Capture any thoughts you have during the usability study.
- Summarize a participant's experience during the study.
- Highlight compelling quotes to include in your research report.

### SPREADSHEET NOTE - TAKING :-

Tasks, Click Path, Observations, Quotes and Task Completion.

## MODULE 3

**Synthesize Feedback** : Combine ideas to draw conclusions.

**Iterate** : Revise a original design to create a new and improved version.

**Insight** : An observation about people that helps you understand the user or their needs from a new perspective

### From Observations to Insights :-

- \* Gather the data in one place
- \* Organise the data
- \* Find themes
- \* Come up with insights

Gathering data - Affinity diagram

Affinity :- A feeling of like mindedness or compatibility towards something or someone.

Affinity Diagram :- A method of synthesizing that organizes data into groups with common themes or relationships.

## Patterns and themes in research data :-

- \* What common patterns have you identified in the data you collected?
- \* What do they tell you about the product design?

## Strong Insights :-

- Grounded in real data
- Answer the research questions
- Easy to understand
- Increase empathy for UX
- Inspire Direct action

## MODULE - 4 : SHARE

### How to share ?

Two different formats

→ Presentations / Deck  
where each slide has new information.  
(high-level overview of the project)

4 sections :-

Section I - Study Details

Section II - Themes

Section III - Insights and Recommendations

Section IV - Appendix

→ Research Report - A document with fewer visually containing the same information as presentation.

## TIPS FOR CREATING A STRONG PRESENTATION

1. Know your audience
2. Provide an overview
3. Tell a story
4. Show data
5. Less is more when it comes to text
6. Provide recommendations for next steps
7. Leave time for questions

Study details containing

- Research Questions
- Participants
- Methodology

Themes :-

- Supporting evidence for usability study
- Important Quotes.
- Low fidelity prototype - screenshot

## Research Insights :-

- \* Brief description of insights

Prioritize research insights from most urgent to the least urgent.

- P<sub>0</sub> = Must be fixed for your product to work.
  - Prevented the user from completing the main user flow
  - Deceptive pattern
  - Inequitable / Inaccessible.
- P<sub>1</sub> = Include a future prototype to be tested.
- P<sub>2</sub> = Address farther in future

## PRESENTATION TIPS :-

Be concise

Keep your tone conversational

Use stories

Allow pauses

Make eye contact