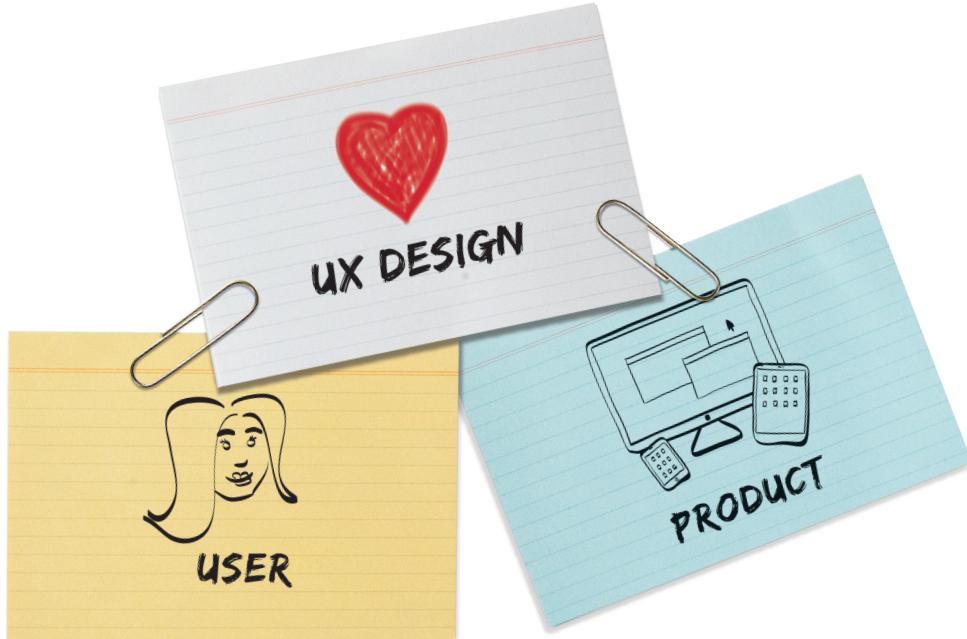


KILLER UX DESIGN

BY JODIE MOULE



CREATE USER EXPERIENCES TO WOW YOUR VISITORS

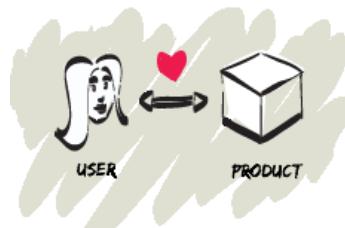


KILLER UX DESIGN

Thanks for your interest!

Thanks again for your interest in “*Killer UX Design*”. It’s great that you’ve decided to download this sample PDF, as it’ll give you a taste of the full version of the book.

Just to recap, the book covers:



EASY-TO-UNDERSTAND VISUALS

Packed full of photos, illustrations and diagrams demonstrating UX concepts.

- * Understanding UX: What UX is and how it can work for you
- * Decoding behavior: Recognize human habits and motivators
- * Researching: Gain insights into users through proven techniques
- * Analyzing insights: Transform research into ideas and opportunities
- * Prototyping: Sketches, wireframes, task flows, and online tools
- * Tracking users’ habits: Set up of a test environment to measure behavior and optimize designs



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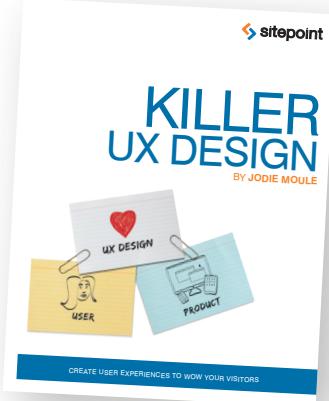


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Killer UX Design

What's in This Excerpt

This excerpt comprises large extracts from two chapters of *Killer UX Design*:

Chapter 1: You Are Not Your User

This chapter defines UX design and considers what makes a great experience. You'll learn why this should matter to you when designing.

Chapter 2: Understand the User Context

In order to produce great usable designs, you need to gain empathy and understanding for your users. We'll address all the research methods available to you and look at how to recruit users for testing.

What's in the Rest of the Book

Understand the Business Problem

If you're unable to understand the problem, you can't solve it. This chapter explores the problem that your client or company aims to solve with the UX process, and explains some useful ways to ensure your success.

Making Sense of What You've Found

In this chapter, we discuss how to analyze the data you've collected from your user testing. Then we'll delve into behavior design and reveal why understanding behavior and habits is intrinsic to your design work.

Sketching to Explore the Design Concept

Once we've conducted an analysis, we move towards using sketching as a tool. Sketching is cost-effective and easy to do, and helps to generate lots of ideas quickly so that you can select a few really great ones to take to the next stage.

Prototype the Solution

Forming working models of your design is the best way to assess whether your solution—once imagined beyond paper—is going to work or not. Creating rapid prototypes to refine your thought process and ensure you're on the right track is a critical step in your UX process.

Test, Learn, Tweak. Iterate

The whole reason for creating prototypes is to test them with your users, in order to validate whether your design is worth pursuing. This process allows you to ascertain whether users understand your design, and allows for further refining. Final tweaks now will give you confidence that the decisions you've made along the way are the right ones.

Launch to Learn About Behavior

This final chapter focuses on testing and evaluating your solution as you prepare to launch—and beyond. Once you've let it loose on the market, you'll continue to learn from users' habits and behaviors as they use your product, bringing your UX process full circle .

But there's more ...

This sample is designed to give you a taste of what's in the rest of the book. In order to really understand your users and make the most of solid UX principles, you'll want to dive into the full version of *Killer UX Design*.

At the end of these sample chapters, there's a link to buy and download the full book. Learn how to create interfaces that influence and inspire, and start your UX journey today.

Chapter 1

You Are Not Your User

So what is user experience (UX) anyway?

You might think it would be a relatively easy term to define; however, when I reflected on the evolution of UX, it was quite a difficult task. Why?

UX covers a broad range of interactions a person can have with a business, and in an increasingly connected world, the lines are blurring between the digital and nondigital spheres. What might begin as an online experience can extend into a physical interaction (say, in a bricks-and-mortar store) and then be further influenced with an instore representative—all shaped by a particular business process.

A Broad Perspective

So, let's attempt a simple explanation. **User experience (UX)** is the sum of a series of interactions a person has with a product, service, or organization. A general example of all these elements interacting can be seen in Figure 1.1.

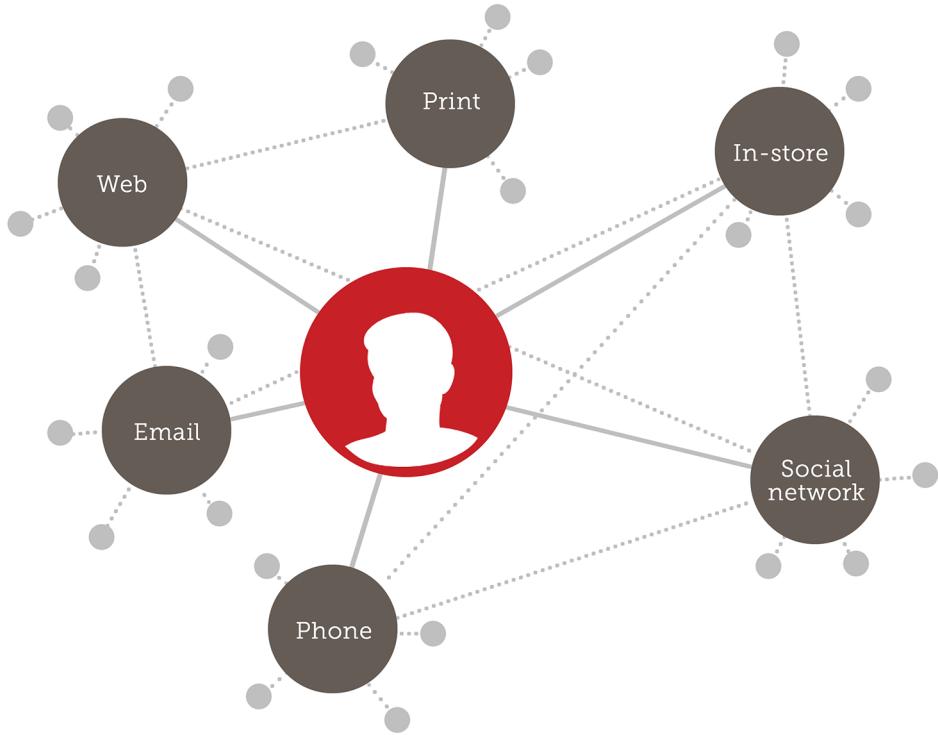


Figure 1.1. The sum of a series of interactions

Broadly considering a user's lifestyle and the overall context of how a product or service is used is necessary if you want to improve on the experience you deliver. This is especially true of digital experiences, and, nowadays, they are closely linked to other channels. To the end-user (or customer), the UX you provide will reflect their perceived experience with your brand, whether dealing with your company online, via a mobile app, or talking to your call center.

The term “user experience” was coined by Don Norman while he was vice president of the Advanced Technology Group at Apple in the 1990s. Upon coming up with the term, Norman said: “I thought human interface and usability were too narrow. I wanted to cover all aspects of the person’s experience with the system, including industrial design graphics, the interface, the physical interaction, and the manual. Since then the term has spread widely, so much so that it is starting to lose its meaning.”¹

¹ You can read an excerpt of this interview, or listen to the full hour-long conversation [<http://www.adaptivepath.com/ideas/e000862>] with Don Norman, a luminary in the field of UX.

As Don implies, it's easy enough to let the term "UX" roll off the tongue, but many people lack an appreciation of what it means to deliver the broader aspects of UX, instead taking a narrow approach and considering only one or two elements.

What makes an experience?

There are several factors that affect the overall experience a user has with a product:

- Usefulness: is the product useful, with a clear purpose?
- Usability: is the product easy to use—navigating within and interacting with—and requiring little need for guidance?
- Learnability: is the product simple to master quickly with minimal instruction required?
- Aesthetics: is the visual appearance of the product and its design appealing to the user?
- Emotions: are the emotional feelings evoked in response to the product and the brand positive, and do they have a lasting impact on the user and their willingness to use the product?

When you consider this range of potential influences, it's easy to see why many disciplines come together to design and deliver a holistic UX.

You've Got to Have a Method

In the field of UX, we examine users' needs with a series of contextual methods known as a **User-centered Design (UCD) methodology**. This is a framework that enables us to engage with and listen to our users to determine what they want. UCD is a design approach that considers a user's needs up front and throughout the design and development process, in order to ensure that the final product is well received. In this book, we'll step through what is essentially the application of UCD practices to generate designs that consider a more integrated UX.

The method we'll follow is outlined in Figure 1.2, where we'll move from a **research phase** (understanding the problem and the user context) through to interpreting **insights** (making sense of what you've found). Then we'll progress to the **concept stage** (sketching, prototyping, and iterating your designs, as well as involving users

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in this process to validate your approach). Finally, we will move into the **design experience** (where you implement the final product, and monitor and improve it over time).

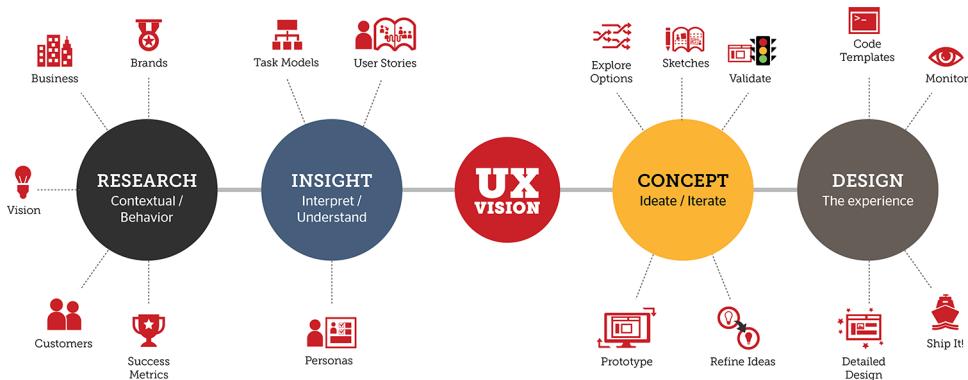


Figure 1.2.

This process will be brought to life through the case study of developing a cooking app, where we'll use techniques that are unique to each stage.

A Balanced Approach to Solving Problems

In UX, we're led by user needs (desirability) as a way of driving the creation of products and services, but this is counterbalanced by feasibility (can it be done?) and viability (does it make sense to the business?). Remember, our users don't have all the answers. While they're great for informing and testing our design concepts, they should never provide the sole basis of a business decision. Take a look at where to start and where to aim for in Figure 1.3.

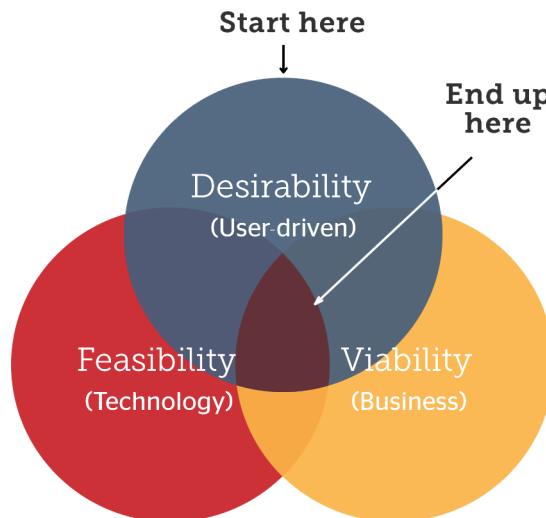


Figure 1.3. Start with desirability first

Once we have gathered insights into our target users, the job of assessing overall feasibility and viability must be reviewed in light of what the business is capable of delivering. The most successful product design understands the balance between user, business, and technological needs; therefore, taking a UX approach requires an understanding of a business landscape that is broader than the project we are engaged to deliver. Exposure to products and services across various areas of an organization helps us to design end-to-end experiences that are a pleasure to use, and you may also identify areas where business costs can be reduced. This often means communicating across different departments or disciplines—IT, marketing, branding, product areas, and so on—in order to realize the best outcomes.

UCD methods have long been a foundation to what's often referred to as **design thinking**. Design thinking is essentially about:

- being human-centered so as to be empathetic to your audience
- **ideating**, the process of thinking through multiple options and solutions for a given problem
- using prototypes as a way to help you work through design problems
- being process-sensitive and understanding that a client's products and services comprise many parts that form a whole

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Design thinking is an overall process that consists of rapidly coming up with ideas, testing concepts, and getting feedback from real users, all while refining your approach. This is UX in a nutshell.

Adopting this plan of attack on your projects will guarantee that you're pulling your ideas together quickly, making informed choices, evaluating and reviewing your ideas with others, and gathering feedback early and often from the product's end-users. All this works to ensure that you'll succeed once you've gone live. Rather than the user dictating outcomes, it helps you—the design expert—to think about the problem at hand, allowing your ideas to evolve as you move through the stages of a design. Perhaps this is different to what you thought constituted a UX approach, but I hope it reveals how you can balance user feedback with your own ideas in order to attain the best design solution in a structured way.

Put Yourself in the User's Shoes

Two factors essential to a successful UX approach are:

- considering the person will eventually use your product
- thinking about the context that the product might be used within

Ultimately, this is about having empathy. I quite often find myself thinking: “How would my parents react to this product?” To me, they represent average, everyday users, and are a good litmus test for whether my designs will be well-received by a broader audience. My parents are like the majority of people not working in IT or any technical industry: they are not highly tech-savvy, but find themselves being pushed into the digital world more and more by companies that are looking for ways to service clients more efficiently and cost-effectively. Like most users I’ve talked to over the years, my parents hesitate when they are confronted with new technology for the first time; they worry about breaking something by pressing the wrong button, and have relayed stories of becoming lost while downloading an ebook.

Here’s what I’ve learned, working in our labs and with people: users do a range of crazy, unexpected things with the interfaces we design, and design patterns we believe are easy to understand are sometimes unclear. Over the years, I’ve listened as users blame themselves when they find a product difficult to use, shrugging to themselves that “they’ll get used to it.”

This type of behavior has been observed and reported upon for years now within the UX industry, and so it is sometimes surprising that we still see this type of learned helplessness rearing its head in our user-focused research.²

In your design work, it's essential to have empathy for the end-users of your product, and this is more easily achieved working in the UX field than you might think. You'll often come up against regular reality checks. Ultimately, it's not the user's fault if they can't make a system work; it is our responsibility as designers to get it right for them, and to make it as easy as possible for them to perform the tasks they want to do. You need to put yourself in their shoes.

Good and Bad User Experiences

So what are the best and worst experiences you've ever had? I'll bet that more comes to mind about an actual company or situation than just one narrow aspect of the experience itself. Personally, the best experience I've ever had was an iced coffee. Okay, that sounds ordinary on its own, but let me explain.

I was in Hong Kong on a business trip and I ordered an iced coffee in the hotel lobby. The iced coffee came out and I noticed there was ice in it. Groan. Lovers of iced coffee will know there is a fine balance between milk and coffee; putting ice in it waters down the coffee. However, when I investigated the ice cubes closely, I noticed they were made of coffee! A smart person had taken into account the problem of ice cubes watering down the coffee. This had been overcome by making ice cubes out of actual coffee, so that when they melted, the "user" was left with an equally strong coffee flavor. Brilliant!

I think this illustrates beautifully what UX is all about and why it matters. My impressions of the drink and the hotel overall were elevated; I'll try to stay at that hotel every time I'm in Hong Kong now. UX takes a broad view of how a product, service, or system will work, and how it will be used by people out there in the real world. It covers the way people feel about an experience, and how satisfied they

² For more on learned helplessness, see the foundational research into the conditioning of dogs that were repeatedly hurt by an adverse stimulus they could not escape, until they eventually stopped trying to avoid the pain. This became referred to as "learned helplessness" due to the their inability to change the situation. Maier, S.F. and Seligman, M.E.P., "Learned Helplessness: Theory and Evidence," *Journal of Experimental Psychology: General*, vol. 105, 1976, pp 3-46.

are when using it. It is often unexpected factors that have the biggest impact. This is important when solving design problems: people notice small details.

So that's the good experience; what about the bad? Well, my worst user experience involved a cheap plastic watch that I bought while my regular watch is being repaired. My life is run by the clock, and the thought of being without a wristwatch for four whole months was not an option I was going to entertain. Sure, it's the twenty-first century, and like everyone else I have a phone that displays the time and is always in reach. I just like glancing at my wrist to find out the time!

This well-known brand makes plastic Swiss watches that are cheap, fun, and loud in design; however, it was only after buying the watch I realized it was going to prove frustrating in one critical way: its inability to show the time clearly, as Figure 1.4 illustrates.



Figure 1.4. Time to buy a new watch

Showing the time is the central reason a watch exists. It seems the design team for this particular watch forgot some really basic factors; namely, to ensure the hour, minute, and second hands can be easily distinguished. Maybe there was a legitimate reason this oversight occurred, but, ultimately, as the user of the watch, I don't care much about any behind-the-scenes motivations. All I know is that I have trouble telling the time on it, and as a result I'll never buy another watch like this again.

Interestingly, my usual behavior of looking at my wrist when I need to know the time has changed with the passing of the months. Now I'm more likely to check my phone, or my computer if I happen to be sitting at my desk. As a result, I am losing the reliance I once had on my watch. This demonstrates how design has influenced my overall experience to such a degree that it has changed my behavior.

It also illustrates what to be on the lookout for in design research. Shortcuts and workarounds that users might take tell us there's an element they're encountering that needs to be examined. This is avoidance behavior. We should home in on these alerts, as they provide hints to help us refashion a product, service, or system.

Another point to consider is the balance between utility and aesthetics. Both factors are important, but, in the end, if some item looks cool but is fairly useless, your users will soon lose interest. In my case, the watch sure is pretty, but my old one will be back in a month—at which point this watch will be retired to my daughter's jewelry box. She's three years old, so being unable to read the time won't bother her too much just yet!

I trust these examples show that we should be concerned with the opinions of our end-users. Experiences create memories for people, and there is a benefit in creating positive experiences and memories for your customers as opposed to negative ones. At the heart of it, negative experiences cost money, as angry customers are more likely to adopt another brand. Customers who are happy to refer your brand to others and speak positively about the experiences they have had with it should be your goal. In what is becoming a more and more competitive landscape, the thoughts, feelings, impressions, and experiences of users count.

Chapter 2

Understand the User Context

In this chapter, we'll discuss entering the user's world to understand it, choosing user experience research methods, and identifying and recruiting users. We'll investigate methods that are useful for engaging users at this stage of your project. My aim is to steer you towards the right methods for the design problem you face.

Moving into the User's World

Good designers understand how to solve problems and create elegant solutions, but also know the value of considering other perspectives when doing so. Expertise within a given profession is often a combination of intuition, experience, some guesswork, and perhaps a touch of magic. Given the gulf between experience and more random factors, it's necessary to move into your user's world to gain a sense of how they live and work.

You'll also need some level of user research in your design projects.

Users Aren't Designers

It's unrealistic to think, however, that asking a bunch of people about your design problems will yield a complete solution.

If you're a fan of *The Simpsons*, you may remember "The Homer" car. This is the episode where Homer's half-brother Herb gives him a job at Powell Motors. Despite complaints from his staff, Herb encourages Homer to follow his instincts and create a car that average American consumers would want to buy. The outcome? Disastrous ... and hysterical!¹

As well as being strange, Homer's creation cost so much to develop and had such a high price tag that Herb's company went out of business. In effect, Homer created a car that came out of his current life experience. This approach clearly failed to follow the rules of balance covered in Chapter 1, whereby you should always account for desirability (human requirement) against viability (business requirement) and feasibility (technology requirement). Never expect people to look beyond their current experience in order to come up with a great solution for you. That's your job.

If we let our users make all the decisions (desirability without viability or feasibility), we'd end up with a horse designed by committee, as shown in Figure 2.1.²



Figure 2.1. Never ask your users to design—you might not like the result

¹ Check out the Simpson's Wiki [http://simpsons.wikia.com/wiki/The_Homer] to see the actual car.

² http://en.wikipedia.org/wiki/Design_by_committee

Combining Methods for Best Effect

The most successful UX research projects involve participants who think carefully about the questions presented, enabling you to creatively plan a mix of methods that aid your design ideas. You should try to use at least two or three methods across a project life cycle, as illustrated in Figure 2.2. You can then review the results obtained across methods and observe themes, overlaps, or contradictions, as well as prevent misleading findings. It also allows you to determine the strongest insights from each method, resulting in a far richer understanding of your users.

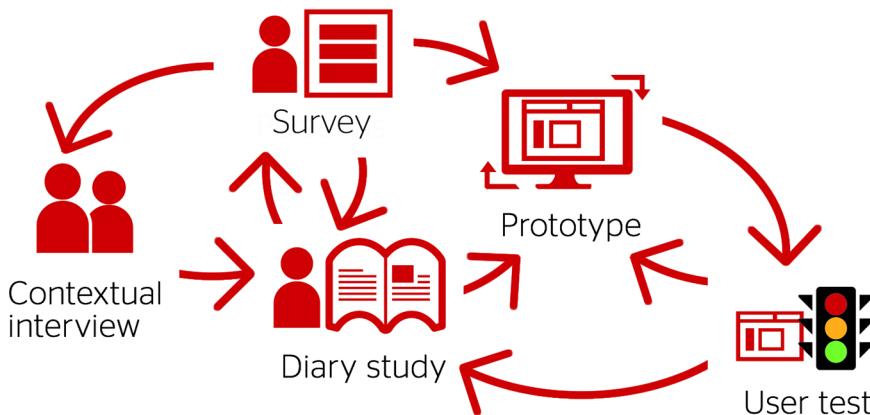


Figure 2.2. Use multiple methods

Choosing Your UX Method

It's important to have a clear plan *before* you approach your users. Research is good for helping you with problem-solving and design work; however, research without a focus is merely guesswork.

Preparing for Research

Here's what you'll need to address when involving users in UX research:

- Plan the method you'll follow to keep users engaged and responsive.
- Create a list of tasks you'll use to interact with users, such as prompts for contextual inquiry, scenarios to walk through when doing user-based testing, design problems to set up in design workshops, and so on. We'll cover what these are shortly.

- Screen the participants against predefined criteria; this enables you to filter who you select against your particular needs. Look at incentives for the participants, such as cash payments, movie tickets, gift cards, or free food.
- Prepare to interact with participants by establishing the meeting space; think about scheduling visits to your users at their workplace or home. Consider whether you'll hire a lab for user-based testing, or set up in your client's office or your own.
- Work out how you'll capture the information you observe—for example, notes or video footage—and how you'll analyze your data.
- Finally, recruit your users (we'll go into detail on how to do this in the section called “The User Interview”, so hold this thought).

I like to keep in touch with some of the users engaged in up-front contextual research, and invite them back throughout the design process for workshops and testing sessions. This way they can comment on changes made as the design evolves. This approach helps balance feedback between those who've had no exposure to the product, and those who have been part of the entire research journey.

Method Types

Table 2.1 provides a summary of the different types of user research methods you might encounter, but it's by no means exhaustive. Some of the terms might be new to you, but we'll be covering the most important ones later when we discuss some of the more common methods in detail.

Table 2.1. Different types of user research

Type of Approach	Research Method	Helps to Answer ...	How many samples needed?
Users' preferences: their opinions, likes, and desires	<ul style="list-style-type: none"> ■ Questionnaire or survey (indirect) ■ Focus group ■ Customer feedback 	What do users think about?	Larger volumes: hundreds to thousands for a survey; four to 20 for focus groups
Exploratory: investigating the context in which users complete tasks, helping to understand habits, motivators, drivers, and behaviors	<ul style="list-style-type: none"> ■ Contextual inquiry ■ Behavioral interview ■ Diary study (indirect) ■ Mental models 	What is an individual trying to accomplish?	Smaller samples with this type of research: 12 inquiries or interviews; four to six diary studies
Summative: what is understood or accomplished with a product?	<ul style="list-style-type: none"> ■ Usability tests ■ Card sort (can be direct or indirect) ■ Design workshop 	Can users complete tasks?	Smaller samples with this type of research: eight to 12 users for testing and card sorts; four to six for workshops

Different techniques will help at different stages of the UX process, so you should always choose the method that's most appropriate for the types of questions you have to ask, as well as the needs of the project at that point. You may feel more comfortable implementing some methods over others due to their familiarity; for example, usability testing is probably better known to many of you than contextual inquiry. Still, I encourage you to try each of them, as it will help you develop sound judgment. Over time, you'll come to know which tool you should be pulling out of your research arsenal, and when best to use it.

Now I will present a few techniques that produce what I believe to be the best outcomes for this stage of the process.

The User Interview

User interviews are a valuable method for kicking off exploratory research, as mentioned in Table 2.1, although they present some areas of concern. Trusting what users *say* against what they actually *do* can be problematic. Humans are usually bad at self-reporting, and when challenged, often make up stuff on the spot. There are a range of psychological reasons for this which are beyond the scope of this book—but nonetheless, be warned.

Still, a user interview will help you zero in on the problems that users raise during the course of conversation. It allows you to explore general attitudes, look deeper into motivators and drivers, and explore workflows. You can ask users to recall specific instances when they've done a task well or when it proved a challenge, and have them relay the events in detail. The more structured you make the conversation with current or potential users of your product, the better.



Figure 2.3. Interviewing your users

Some tips to help you succeed with a user interview include:

- Have users complete a pre-session homework activity (see the section called “Priming Activity”). It will help guide discussions when you’re new to interviewing, as well as provide topics of conversation.
- Ideally, conduct the interview at the users’ homes or workplaces, where they are “within context” of the topics you might be discussing.
- Have a plan for the results you want to gain from the interviews and put together a page of prompts so that you can focus the conversation towards achieving this.
- Be flexible with your structure if it means achieving the outcomes you need.
- Choose questions that probe thoughts, feelings, beliefs, reactions, and tasks that people complete, and ask “why?” liberally as a way to dig a bit deeper.
- Ask users about a time when they experienced difficulty in completing tasks, as well as a time when it all went well.
- Home in on any useful shortcuts or workarounds that users mention.
- Try to keep the interview to one hour, as attention spans wane after this time.

Contextual Inquiry

In Table 2.1, we mentioned **contextual inquiry**. This is an unstructured interview that occurs in the context in which your product or service will be used, so that you can observe and record the way people work and behave. In a contextual inquiry, you’ll witness a user’s common habits and working techniques, asking questions when necessary and recording your observations, which should influence your design of the product or service.

Your main job here is to learn from your users: observe how they work and question them when you need to clarify details. Contextual inquiry is often used to uncover unmet needs or hidden desires; it’s also a good way to discover how people think and talk about a given topic. Remember that *how* people speak about tasks and events, including the terms they use, can often reveal hidden issues and problems waiting to be resolved through good design. Figure 2.4 shows the environment in

which a contextual inquiry took place, as well as the gestures performed by the user while talking about their cooking habits.



Figure 2.4. Observe your users in the context of their everyday behavior

Some tips to help you succeed with contextual inquiry:

- Clarify what is the most important context of use (work or home) for your project.
- Consider how many interviews per day you can undertake when travel is involved to conduct these sessions. Recruit your users and schedule a time to visit them that matches an overall schedule. Ask permission if you want to record users in their natural context (usually a cash incentive is needed for this).
- Treat people with respect and avoid passing judgment on the way users perform tasks. Think of yourself as a student trying to learn what it is that the user does and how they do it. For example, if you're designing a mobile app for athletes, put on your trainers and go for a run. Feel what it might be like to be fit and healthy, and then consider what matters most to potential users about their passion for running.
- It's fine to be curious and probe for more information.
- Learn to think on your feet and follow the natural flow of the situation; it's okay to abandon the script.

- Remember, random tangents can provide the best insights into users' private worlds. Let them go off on these tangents—you might find gold!

Diary Studies

Diary studies, seen in Figure 2.5, were also mentioned in Table 2.1. They enable your users to document the way they work relative to a given topic area over a period of time. As the designer, you will usually create the kit for participants to record their work, and later review it with them.

Often, I'll leave an A3 workbook with a participant following an initial briefing; sometimes I might leave additional tools, such as a cell phone that they can use to take photos or text me with questions as they pop up. This is to uncover elements that the participants may have failed to reveal, or that you might have missed when conducting a contextual inquiry.

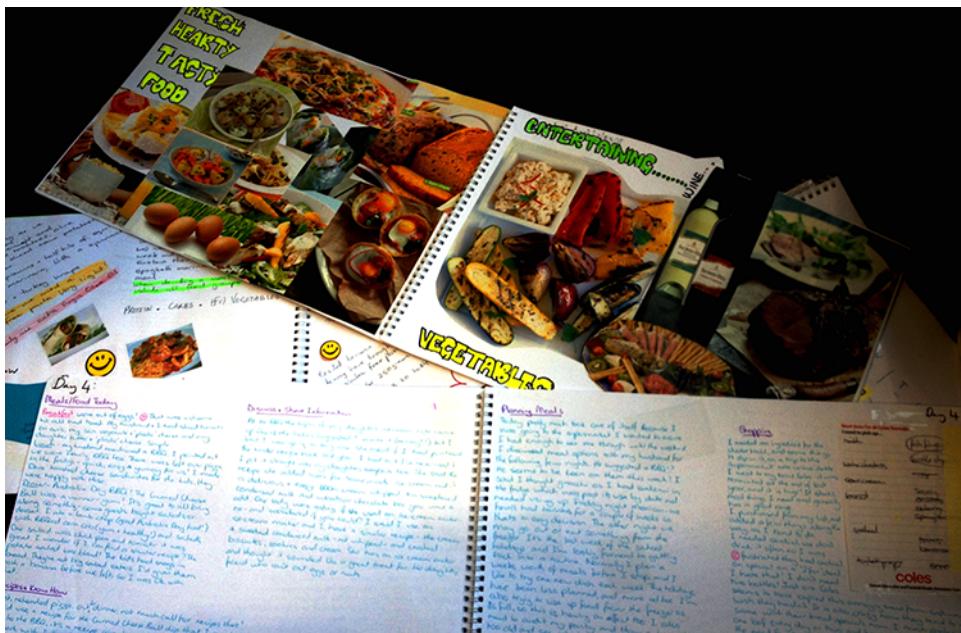


Figure 2.5. Diary studies

Here are a few tips when it comes to mastering diary studies:

- Diary studies should be combined with a pre- and post-interview briefs to bring the participant up to speed on your expectations; in the post-interview follow-

up, have the participant walk through their diary and discuss the information they have recorded.

- Contact your users regularly to discuss what they've been doing and recording, and redirect activities if necessary.
- It's useful to conduct an in-person catchup midway through the process to review what has been done.
- Any user output—such as comments or sketches, for instance—are handy to refer to in later design and development processes, as they represent a strong user voice.

Priming Activity

I've used priming activities on my projects for a while now. A **priming activity** is essentially a homework activity for research participants to complete before we meet with them. We have them create a collage of words and images on a poster-size piece of cardboard or paper that answers a broad research question concerning the topic area of interest; for example, we might ask participants to show "What cooking means to me, personally." You can see an example of this in Figure 2.6.

No matter what the research process (user-testing, contextual inquiry, and so on), I ask participants to complete this homework activity before I see them. I find this advance activity acts as a great way to kick off the session, as primed participants are more relaxed and engaged about discussing the topic of interest. Priming activities also represent a quick way to gather insights about your users when you lack the time or budget to conduct a contextual inquiry or diary study.

The origins of this method tie in design and brand research, as well as family psychology, where it allows participants to create links with information to reflect the way they think; moreover, it often uncovers aspects they might think to discuss, or are even consciously aware of. The activity taps into both left- and right-brain thinking, so the visual nature of the output is great for exploring design research. You can find the homework sheet we send to participants in the tools section of this book to download as a template ([chapter03/homework-activity-template.dotx](#)) and as an example ([chapter03/homework-activity-recipe-app.docx](#)).



Figure 2.6. Priming your users for homework

Here are a few hints to help you construct a priming activity:

- Create a guide for users to follow and send it to them to complete before you meet with them (I generally send it to users for research as soon as they've been recruited).
- Ask a broad question about the topic area. For example, "how do you feel about managing your finances?" "How do you feel about cooking and meal preparation?" Take care to avoid biasing your users' thinking, and encourage them to think in a general way.
- Have participants use an A3-sized (or larger) piece of paper or cardboard to complete the activity, and instruct them to use a mixture of images, words, and quotes about the given topic.

Usability Testing

Probably the best known of all UX methods, **usability testing** is a technique for evaluating how easy a product or service is to use by having end-users complete a set of typical tasks. It can be used in your initial research stages, as shown in Figure 2.7, to evaluate how an existing product usually performs (known as **benchmarking**), in order to shape the approach you take with your current design efforts.

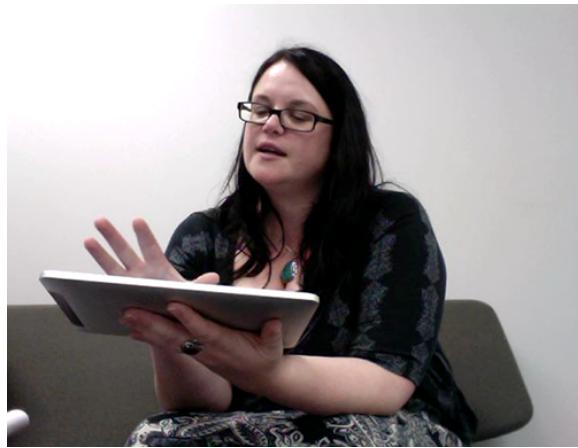


Figure 2.7. Usability testing

You can have users test across a range of competing or complementary websites; any feedback may help shape your design work. What's handy about this method is that there's no need to wait until everything is fully designed before you draw on it; you're basically testing prototypes of the final system during the design evolution.

Here are a few tips to help you along the usability testing path:

- Recruit users through lists from your client or a third-party recruiter.
- Most usability-testing sessions employ somewhere between eight to 12 users. Large numbers are unnecessary when it comes to identifying patterns in behavior.
- Set a clear start time when scheduling for sessions. Try to keep sessions to an hour and a half maximum.
- Ensure you have a clear set of tasks for your users to complete, and discuss their ease or difficulty with your client up front.

- User-based testing can be used to evaluate a product that already exists, or to evaluate a user's performance with competing products. It can also effectively test ideas early on in the design process (concept stage) and in later phases (low- or high-fidelity design stages). In this sense, it's one of the most flexible methods in UX.
- To achieve the most from your sessions, encourage your participants to think aloud. Avoid answering direct questions from your user; instead, redirect them back to their own considerations, with guiding questions such as: "What would you expect?", "What are your thoughts on this?", or "How do you think it might be done?".
- Set a measure of a concept's success or failure. A simple five-point scale is a good way to rate the difficulty of a task. For example, 1 and 2 = fail; 3 = benchmark performance; 4 and 5 = little or no issues noted.

Recruiting the Right People

Choosing the right users when you conduct research is critical for an effective outcome. In order to do so, you need to apply filters that detail some specifics about the type of people you're after. If you are yet to begin research, you should consider catching up with professionals in other parts of the client's business you're consulting with to establish their take on the key target group; people who work in marketing, branding, customer support services, or product management tend to have a good handle on who typifies the target market. And if there's a department that specializes in UX as part of the business, that's obviously a great place to start!

In this section, we'll cover some user characteristics that you may recognize from client discussions, highlight the areas on which to focus your efforts, and help you narrow down who you bring into your user research. Figure 2.8 suggests that your users are under three.



Figure 2.8. Choosing the right people is critical

Making a List of Potential Users

Once you've collected any information about a target audience from your client, the next step is to clarify in your own mind who you think would use the product. Here are some steps to help you along this road:

1. Brainstorm with others or just think about the key tasks required of users when engaging with the product.
2. Group these tasks into categories.
3. Make up some category names; for example, in the case of our recipe app we could have Single Foodies, Family Caterers, Home Leavers, and Gourmet Grays.
4. Consider tying these category types back to some of the market research data you've encountered and compare notes.

This process helps you consider your product's user base and forces you to think about the customer differently than from standard demographics alone. Most of the recruitment specifications that I've sent to a third-party agency have a mix of behavioral characteristics and demographic data. It helps me to broadly trace the people I expect to recruit into the research process, and place them in categories my client

sees as their customers. For instance, we may use demographics such as age, gender, education, or income, to name a few.



Right person for the job?

Just remember that the more specific you make your criteria, the harder it might be for your recruiter to find the right people. Still, it is important that the people you see are relevant. Make sure you give enough time to this task.



Recruiting Tools

You'll find an example recruitment specification in the tools folder that accompanies this book: [chapter03/recruitment-specification-template.dotx](#). Download this template as a useful starting point.

Going Left of Center

I've always found it useful to look beyond the users seen as central to the client's target market, and consider some **edge cases**. You learn a great deal from edge cases, but what are they? In the same way we sometimes choose to say what something *isn't* rather than what it is, when we evaluate our designs we should think about extreme user-types that operate a bit differently to the norm. This uncovers new or unexpected insights and helps to clarify our product boundaries; for instance, an age range, or a certain level of proficiency.

Here's an example of using an edge case from a recent project in the financial services sector. I was researching wealthy customers, observing their financial habits and the behaviors they undertake automatically without further thought. Additionally, I included users in my research who were struggling financially, or had fallen into bankruptcy. This helped to reveal some of the difficulties people face while trying to juggle financial management tasks in day-to-day life. These insights led to a design solution that would ultimately appeal to both ends of the financial spectrum.

You'll gain a better understanding of how to approach your design problem if you view it from both angles, as seen in Figure 2.9.



Figure 2.9. Know your main players, but live on the edge a bit, too

Case Study: Understanding the User Context

Putting all this information in context, the steps we take for our recipe app should look like this:

- Clarify the questions we want to ask our users and further explore them through research (using our 5 Whys to brainstorm with our client and our team).
- Access any background demographic information on our audience segments, brainstorm who we think our users are, and create personas (user profiles).
- Decide what research methods would suit the questions we want answered.
- Prepare the materials we need and recruit the participants.
- Once recruited, go to where the app will eventually be used (in our case, the user's kitchen), and listen to what's said—and not—for an idea of the context our design will end up in.



Personas

Personas are fictional characters that are created to represent the various user types of a certain product. These characters are given names, photos, and details

relevant to the task at hand, ensuring that all consumer segments of the product or brand are given a voice.

Clarifying Questions

Some additional questions may have arisen as you read through this chapter. What were they? For me, they were:

- What type of role does cooking and recipes play in people's lives?
- How and where are cookbooks and cooking references stored?
- When do people refer to recipe books, and when do they use recipes from memory or improvise?
- How do people share recipe information? What are the current tools for doing this?
- Has anyone shared recipes with their family that they recall eating as a child? When do they cook these? Are these stored differently to other recipes?
- When people are cooking, at what points in time do they actually refer to recipe information in a book?
- How do they read recipe instructions while cooking?
- How do users talk about food and cooking? What is the language they use to categorize recipes?

I'm sure you can see how the questions are becoming more task-focused. This is important, as we're going into users' environments to watch them do a job: the job of cooking and meal preparation. How did your questions compare to mine?

Who are our recipe app users?

We need to brainstorm the type of people who might use our app, as well as what tasks they're likely to complete concerning food. Our food-related tasks list might look a little like Table 2.2 (keeping in mind that this is more a "brain dump" of ideas at this stage):

Table 2.2. Key tasks related to food and cooking

Cooks food	Goes out to dinner
Buys organic food	Buys food at the supermarket
Buys at local corner shops	Always eats out
Enjoys sharing food	Shares recipes
Talks about cooking	Watches food shows
Usually has nothing in the pantry	Cooks food mother made
Has dinner parties	Finds it hard to cook
Dreams of being a chef	Searches the Web for recipes
Prints out recipes to store and save	Downloads recipe apps
Cooks the same dishes most of the time	Shares photos of food
Uploads photos of food to social media	Buys takeout a lot of the time
Grows own food	Buys food magazines
Emails recipes	Cooks for fun
Lives a healthy lifestyle	Enjoys trying new food
Has secret recipes	Talks about food when in company
Stores recipes	Dislikes cooking

Clustering Tasks to Create User Types

Our next task is to:

- Group tasks into clusters to make the data manageable; for example, Shares recipes, Stores recipes, Cooks regular meals, and so on.
- For all the groups you create, ask yourself, “Who would do this?”
- Make up names that fit the type of people you imagine would behave in this way.

Naturally, it helps to consider your users in a task-focused manner, as this ultimately informs the type of people you’ll recruit. For our recipe app, we need to come up with groups of users that fit the tasks we’ve outlined, such as:

- young children cooking

- kids and their friends
- home-leavers who can't cook (edge case)
- people who struggle with cooking and therefore hate it (edge case)
- people who've been living away from home for a while
- people who date regularly and like impressing others with cooking
- single couples that love cooking
- parents with kids
- parents with kids not living at home
- grandparents who entertain or eat out
- chefs or professional cooks and writers (edge case)

We'll now refine these groups to logical segment names, and create our recruitment brief for an agency. These will also form the basis of the user personas we construct.

Defining Our Initial Cut of Users

The initial target groups might be:

- Home leavers: social, young adults who've just left home, and food is more about sustenance than enjoyment
- Single foodies: unmarried, childless people for whom cooking and sharing food is a huge part of their lives
- Family caterers: people with youngish kids who used to love dinner parties, but whose focus is now on feeding their brood of mainly unadventurous and fussy eaters
- Gourmet grays: time-rich empty-nesters and grandparents for whom cooking means family, and whose many family events revolve around eating and meal preparation

These groupings (further illustrated in Figure 2.10) form the basis of skeleton personas that we'll refer to during our design efforts. These will be further refined once we've undertaken user research.



Figure 2.10. First persona sketches for the app

The Scene Is Set

In this chapter, we have taken some time to understand the business problem we are faced with, and we've crafted a UX process for research that will help us design with a level of empathy for the eventual users of our product. Once you go to the user's environment and make an assessment of what matters most to them, you need to then move toward making sense of what you have seen.

Next up, we'll look at how to analyze all that data we've now collected and see how it may indeed change our design approach, and propel us further forward.

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Jodie Moule is co-founder and director of Symplicit, an experience design consultancy based in Australia that focuses on research, strategy, and design services. With a background in psychology, her understanding of human behavior is central to helping businesses see their brands through the eyes of customers, influencing the way they approach the design of their products, systems, and processes.

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