1. 4.7: Reporting Findings & Making Recommendations
2. Learning Goals

* Report usability test findings and prioritize fixes

 Estimated Read Time: 30 Minutes.

1. Introduction

Great to have you back! Now that you’ve conducted usability tests, analyzed your information, and organized it in a meaningful way, it’s time to actually do something with all that information. If you’re working for or with someone on your designs, this means it’s time to communicate your findings to clients and colleagues. After all, even the best research won’t make a difference if you can’t communicate it effectively.

Unfortunately, this is where a lot of designers fail. Communication is already complicated enough, especially when working on highly complex systems or in large organizations. In this Exercise, we’ll dig into the nuances of prioritizing your findings and effectively communicating your research, as well as the steps you’ll take next. Ready to get started?

1. Prioritizing Your Findings

Communicating your research involves several stages. First, you’ll want to look at your Rainbow Spreadsheet and establish what you think should be addressed in your next round of updates or testing. You’ve already done the bulk of preparation for this step by categorizing, analyzing, and assigning metrics to your 25 most important test results (and thinking about possible solutions). Once you have an idea as to what your highest priority action items should be, you can consider the specific audience you’ll be communicating with to further refine your list of priorities. Your final list of priorities, along with the most important information from your test plan, will be consolidated into a test report, which we’ll talk about later in this Exercise.

1. Itemizing Your Fixes

Let’s take a look at the Rainbow Spreadsheet you filled out in the last Exercise. Great Scott, that’s a lot of errors! But no worries. The whole point of usability testing is to *find* those errors so you can iron them out and produce a great product. There is, however, one tricky part—deciding what to fix first.

As you’re a team of one, the process of prioritizing your fixes is fairly straightforward. First, take a quick look at your Rainbow Spreadsheet and determine which errors are most critical. This could be due to a high frequency of reports or a high level of severity. You already did a bit of this prioritization at the end of the last Exercise, but take a look to see if your initial analyses still stand. Any critical errors should be addressed in the next iteration of your prototype, while the less severe errors can be addressed at a later point in time (depending on your resources).

For larger teams and organizations, prioritizing errors and new features can be a bit more difficult. It’s important to fight for the best design decisions, but business goals, technical complexity, and time constraints may influence prioritization. These are genuine constraints to consider. One of the best ways to prioritize errors and features when working with others is through a process called dot voting.

**Dot voting**, true to its name, involves voting on options with dots. You start with a variety of different options (in this case, features or errors) and a limited number of dots. Place each option up on the wall and give yourself five dots to allocate to features you believe should be addressed first. How many dots you give yourself generally depends on the scope of your project, along with a number of other factors, but five is usually a good place to start. These five errors or features are then prioritized and become the focal points of your project iterations.

The process would work the same for a large group, making it a great way to encourage collaboration and tease out thoughts and opinions in an interactive, democratic way. Here’s a step-by-step guide to running your own dot voting session. If you’d like to try it for yourself, try recruiting a fellow student or friend to go through the process with you.

1. Write out possible options on sticky notes or a whiteboard.
2. Give yourself and others colored dot stickers or a marker.
3. Allow each participant a certain number of “dots.” For simplicity’s sake, divide your total errors/features by five (or the closest divisor) and give everyone that amount of dots. If there are 25 errors/features, for example, limit people to five dots.
4. Timebox the exercise. Three to five minutes should be plenty.
5. Don’t allow people to speak during the exercise. The process should be democratic, and you don’t want influential individuals to lobby for particular options.
6. Call time and count up the dots. The options with the most dots are prioritized accordingly.



1. Learning to Pick Your Battles

In an ideal world, you’d choose to prioritize errors that appear most critical (as you did above) and solve those problems with a new iteration. Tada! Seems easy, right? Unfortunately, this isn’t an ideal world. In most projects, you’ll be working with other stakeholders and need to consider their priorities in addition to other issues such as business needs, time, and available resources. Inevitably, there will be *many* errors you’d like to fix and features to kill or implement. Especially early on in a project, it’s important to pick your battles wisely as you’ll, no doubt, encounter constraints and resource competition (available developers, for example). As a designer, you need to learn to make your every move count, aligning your design decisions with the technical capabilities and business goals of the project and company.

Do this by considering your audience. To whom are you reporting your findings? What are they working on? What are their goals? What were the original business requirements? As experienced designers, it’s important to consider the perspective of those we work with. One of the biggest mistakes designers make is not adjusting our mission and message to communicate effectively with others. We make a living out of empathy—make sure you practice it with your colleagues, as well. Here are some potential factors to consider when creating and tailoring your report:

* **Technical:** Make sure to include developers and others on the technical side of the process. Ask them how difficult it would be to fix certain errors or implement certain features and get estimates on the amount of time and capacity it would take to build or fix something. If a particular error or feature has a similar prioritization to another (from a design standpoint), consider prioritizing fixes that would be quick for the technical team. Your colleagues will appreciate it, and your team will notice the quick results, making it a win-win situation for you.
* **Business:** What are the business goals? Are there any errors or features that could have a measurable effect on business goals? For example, if you can fix a form field in the payment checkout flow that increases conversion by 5%, thus earning the company a five million increase in revenue, you’ll likely get time and funding for future research. Again, everybody wins.
* **Political:** Designers would make terrible politicians. We’re naturally focused on form, function, and our customers. While you shouldn’t sacrifice design decisions and sound recommendations, you should always consider the environment. For example, if you’re a design consultant and have a new client, consider that people might have worked hard for the current state of things and would feel hurt at having their work discarded. Fight for your decisions, but not at the expense of building relationships within the team and organization.



1. Creating a Test Report

Now that you’ve narrowed your issues down to those most critical and relevant to stakeholders, you need to communicate these findings. This can be done via a **test report**, a short, one- to two-page summary of your test and its findings. This report highlights the most important features of the usability test for the stakeholders—what wasn’t working and what you’ll do to fix it.

As with many other aspects of UX, the kind of test report you produce will vary depending on the size and complexity of your project, as well as the company itself. In general, the more concise you can be, the better. As you’ve been working on a relatively small project that doesn’t involve many stakeholders, we’ll recommend a short format that includes the following sections:

**Page 1: Test Plan Highlights**

The first page will be a consolidated version of the test plan you created previously. Why consolidated? Your stakeholders don’t need to know every microscopic detail of your test—they’re more interested in the highlights and the results. You can link out to more detailed documents such as your test script for interested parties, but you want to make sure your stakeholders focus on the important points:

* Background information for your app and the problem(s) you were trying to solve
* Test goals and objectives
* Short description of the methodology (how, when, where, how long, and with how many people. For example: *“A usability study will be held in at Triply headquarters with at least six test participants. Each participant session will last 10-15 minutes and will include a short briefing, an interview, and a task performance with Triply.”*)
* General participant information
* Link to your test script

Don’t worry about writing all of this down now—we’ll provide you with a template when you get to the Task.

**Page 2: Test Results and Next Steps**

On the second page, you’ll want to focus on what you learned from the test, as well as your next steps.

* **Introduction:** Summarize the test and your main findings. For example:

“Six usability tests were carried out at the Triply headquarters. Five out of six participants were able to complete all tasks asked of them while the sixth participant completed all but one task. Five out of six participants agreed or strongly agreed that the prototype was easy to use according to Lewis’ After-Scenario Questionnaire satisfaction metric. The main challenges and errors experienced by the participants are listed below.”

* **Issues:** List out each of the five prioritized issues you selected. Include a short description of the issue and its severity (you can use a simple high, medium, low scale to avoid the complexity of explaining your metrics). Then, list your proposed solution and the evidence for making this change.

**Issue 1: Participants had trouble finding the Home button (high severity)**

Suggested Change: Move Home button to the top left corner and change the icon shape to a classic home shape

Evidence: 66% of participants could not find the Home button. P1 stated that they would normally expect the Home button to appear on the upper left side of the app. Screen recordings of P2 and P3 show them checking the upper left corner of the app when asked to complete this task.

* **Conclusion:** This is a wrap-up of your results and a final chance to rehash the changes you think are important, as well as why the changes will be beneficial (i.e., why they’re worth investing resources in making).

Most of the participants found Triply easy to use and expressed having a positive experience with the app. Participants were able to search for travel information, but some were unable to navigate back to use other functions of the app located on the home screen. Having a redesigned home screen will ensure a smoother, more user-centered experience.

**Longer Test Reports**

As mentioned earlier, you may end up creating a more detailed test report for certain stakeholders. This is especially true when working for larger public agencies such as the government or university systems. If you’re interested, check out this [excellent template](https://www.usability.gov/how-to-and-tools/resources/templates/report-template-usability-test.html) from Usability.gov that shows a more detailed test report.

1. Communicating Your Findings

For the purposes of this course, we’ll be focusing solely on the creation of your test report. That being said, it’s still important that we touch briefly on things you’ll want to consider when communicating your findings in a business environment. This is a skill that will prove useful to you in your future role as a UX designer. When communicating with different stakeholders in your company, you’ll need to consider how much and what information they need to know, as well as how to communicate it to them in a way that makes sense. This is a critical responsibility of UX designers in working business settings, whether that be as a full-time team member or a freelancer.

1. Adjusting Levels of Complexity

When creating your test report, you’ll need to keep in mind two different possibilities: a need to *reduce* the complexity of your report and a need to *increase* the complexity of your report. As we stated above, which possibility applies to you and your project will depend on which stakeholders you’re communicating your findings to, as well as the purpose of the communication. If you’re attempting to convince a project manager of your need for developer hours to fix or create a feature of your prototype, you’ll want to include technical estimates in your findings and recommendations. If you’re simply looking for the budget to run another round of usability tests, you may want to, instead, focus on the open questions from the test and the added benefits to the company of doing another round.

Don’t worry! These are highly particular situations, and you’ll learn how to navigate them as you gain more experience in the field. For now, however, just keep in mind that these are *possible* situations you might come across.

**Reducing Complexity:** Once you’ve decided on the errors and features to prioritize, as well as the audience to whom you’re presenting, it’s time to consider the complexity of your research. Read your recommendations out loud and consider removing or explaining design-specific jargon to ensure your recommendations make sense and resonate with your target audience.

For example, let’s discuss how to communicate a fairly straightforward concept: buttons. Seems simple, right? How much jargon beyond size, shape, and color could be involved in the humble button? Well, in addition to simply being clickable, here are some important instances of jargon used when describing digital buttons:

* **Business Jargon.** A Call-to-Action, or “CTA,” is the button that represents the primary desired action on the page, such as “Buy Now!” or “Sign Me Up.” In an ideal world, customers will click on this button. It is therefore highlighted and promoted accordingly.
* **Design Jargon.** Button styles, often referred to as primary, secondary, and tertiary buttons, are designed and labeled as part of an interaction design style guide to promote consistency across the design.
* **Technical Jargon.** :focus, :active, and :hover states are used when writing frontend CSS code to determine the interaction design of buttons. There are subtle differences in the three different states.

In summary, in a business context, it might be more important to focus on jargon such as “CTA” to indicate how you expect the design to meet business, sales, and marketing goals. When communicating exactly what to build with developers, consider using technical terms, such as :focus or :hover states. Treat this as an opportunity to learn and gain respect from your technical clients and colleagues. When talking to someone outside of these contexts, consider simplifying your description and using more universal vocabulary. In any case, your audience will appreciate you meeting them halfway with communication and jargon that’s meaningful to them.

1. Just-In-Time Information

The ultimate goal of communicating your test results is to present meaningful information to a specific audience at the right time. Through research and prioritization, we should have meaningful information to communicate. We’ve also discussed an awareness of audience. Now, it’s time to consider the timing of your communication.

Have you ever received a long document at work? It’s likely you have; however, do you drop everything to read it? Probably not.

In fact, if the document is long and intended for a variety of audiences, it’s less likely to be read and incorporated into the immediate workflow. As designers and researchers, we must be considerate and timely with the information we share if we want it to be adopted. The point of making a research report is not to demonstrate how much hard work you’ve done, but to concisely and effectively communicate just-in-time information.

**Just-In-Time**, or JIT, is a concept that originates from lean production principles conceived by Toyota in Japan to help them produce cars more efficiently. According to Wikipedia, lean production is a systematic method for elimination of waste ("[Muda](https://en.wikipedia.org/wiki/Muda_(Japanese_term))") within a manufacturing system. Lean also takes into account waste created through overburden ("[Muri](https://en.wikipedia.org/wiki/Muri_(Japanese_term))") and waste created through unevenness in work loads ("[Mura](https://en.wikipedia.org/wiki/Mura_(Japanese_term))").

While Toyota engages in physical production, this principle can also apply with knowledge work. In fact, Toyota Lean Manufacturing principles have gone on to be popularized by lean authorities like Eric Reis and Jeff Gothelf.

If physical production requires the storage of physical parts in warehouses, knowledge production requires the storage of information. Sending clients and colleagues massive documents increases the amount of information they have to store, either in their head or on their computer. To reduce cognitive load, consider isolating useful information into easily manageable chunks. Stakeholders don’t need to see the full report; instead, it would be more useful to send tailor-made reports to specific people just-in-time (i.e., when it’s convenient for them to tackle the prioritized errors and features).

Consider creating a comprehensive report for yourself and your immediate team while curating different reports for different people at the appropriate time. To see an example of a more comprehensive report, check out the Usability.gov template linked in the test report section above.

"'Just-in-time' means making 'only what’s needed, when it’s needed, and in the amount needed.' For example, to efficiently produce a large number of automobiles, which can consist of around 30,000 parts, it’s necessary to create a detailed production plan that includes parts procurement. Supplying 'what’s needed, when it’s needed, and in the amount needed' according to this production plan can eliminate waste, inconsistencies, and unreasonable requirements, resulting in improved productivity.”  
[TOYOTA WEBSITE](http://www.toyota-global.com/company/vision_philosophy/toyota_production_system/just-in-time.html)

1. Keeping Things Short

The thought and effort you’ve put into conducting your usability tests and reporting your findings is no joke! It’s tempting to want to tell the entire story, but, in reality, you’ll likely have only a short window of time to convince people to take on and implement your findings. When working outside of an academic setting, it’s especially important to distill test plans and reports as much as possible into their most critical takeaways. For this reason, you’ll be creating a concise, two-page test report for this Exercise’s Task.

Keep in mind that reporting your research findings doesn’t have to be boring. In addition, you’ll mostly likely end up presenting this information in a variety of different ways (conversations, meetings, reports, presentations, etc.). Keeping your findings concise doesn’t mean you can’t still tell a story by keeping your findings centered around your user personas.

Try to bring your personas and research participants to life for your audience. You may even want to use their names in your report. Spreadsheets and diagrams are useful for design researchers to organize their thoughts, but may not illustrate the real pain points and frustrations customers are feeling with a product. It’s up to you to tell that story and make sure your stakeholders understand what’s most important to your users.

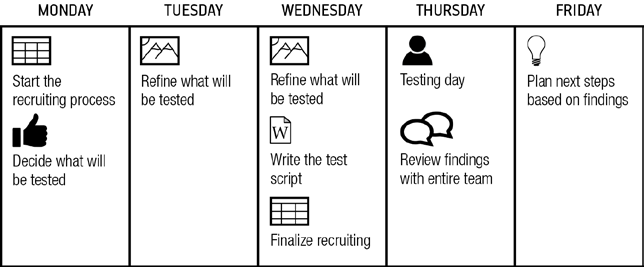
1. Summary

Reporting your findings to your stakeholders can be a challenge, but there are ways to smooth the process. After all, you’ve already done all the hard work, from setting up and conducting your test, to categorizing and cataloging your results, to thinking through priorities and planning solutions. Remember to keep your communication concise and to the point. In the real world, your reports should always be tailored to particular stakeholders.

Always take care to embrace the complexity of human psychology and design, but don’t subject your colleagues and peers to unnecessary complexity. Communicate your findings in a simple, meaningful way. That’s how people learn, and that’s how things get done.

"For the simplicity on this side of complexity, I wouldn't give you a fig. But for the simplicity on the other side of complexity, for that I would give you anything I have."  
OLIVER WENDELL HOLMES SR., AMERICAN POET AND POLYMATH

As a final note, you’ll find that the pacing of this process—conducting a usability test, reporting findings, and iterating on your designs—will vary throughout your career. Throughout this Achievement, you’ve already dived into many different aspects of design research, but there is still more to learn. As you progress as a designer and researcher, you’ll find yourself more quickly and efficiently conducting tests. You’ll know which steps you can skip, if any, and where to focus your efforts and energy. In fact, Lean UX outlines a five-day cycle to continuous discovery:



1. Source: [Jeff Gothelf](https://medium.com/@fahadquraishi/book-notes-lean-ux-by-jeff-gothelf-and-josh-seiden-93db3211ddd7)

So, don’t worry if you find yourself taking longer to perform certain tasks and steps—this is all part of your path as a designer. With every test you conduct, report you write, and amassment of data you analyze, you’ll get a little bit more comfortable with the tasks and a little bit quicker. Designers never stop learning!

1. Resources

* [The UX Research Plan That Stakeholders Love](https://www.smashingmagazine.com/2012/01/ux-research-plan-stakeholders-love/)
* [Lean UX by Jeff Gothelf](http://www.jeffgothelf.com/)
* [How to Use Dot Voting Effectively](http://www.dotmocracy.org/dot-voting)
* [The Secret to a Great Presentation](http://eleganthack.com/working-with-story/)
* [Just-in-Time—Philosophy of Complete Elimination of Waste](http://www.toyota-global.com/company/vision_philosophy/toyota_production_system/just-in-time.html)
* [Lean Startup by Eric Reis](http://theleanstartup.com/principles)

Take the quiz to test your knowledge on this Exercise.

Take Quiz

1. Task

* [DIRECTIONS](https://careerfoundry.com/en/steps/reporting-findings#directions)
* [SUBMISSION HISTORY](https://careerfoundry.com/en/steps/reporting-findings#step_submission_history)

 Estimated Task Time: 4 Hours.

Prioritize the top 5 errors or issues that you’ll address in the next iteration of your prototype. Create a 2-page test report with links out to your test plan and test script for those who want more detail. This will give clients, colleagues and stakeholders the option to further explore without overloading them with information. Remember, the goal is to bring the problem and potential solution to life by persuading team members of the value of design and testing efforts. Once you’ve finished your report, return to your prototype and implement your solutions.

**Directions**

1. Identify the top 5 errors to be addressed in the next iteration of your prototype based on evidence from your usability tests and rainbow spreadsheet, and propose suggested changes to your prototype to address the errors.
2. Write up your results in a 2-page test report (see the [usability test template](https://s3.amazonaws.com/coach-courses-us/public/courses/ux-immersion/A4/4.7/UsabilityTestPlanReport4.7.pdf) here).
   * Create a consolidated version of your usability test plan using the first page of the template. The already filled-in helper text can be used as a guide to write your own version, but don’t copy it word-for-word.
   * Include links to additional documentation (such as your complete test plan and test script) where applicable.
   * Create your usability test report using the second page of the template. This will include your 5 errors/issues to be addressed, how you plan to fix them, and your supporting evidence for why an issue is a problem and why your fix is appropriate.
3. Make updates to your prototype based on the 5 errors you identified as being most critical.
4. Upload your 2-page test report, as well as your updated prototype reflecting the 5 issues you identified in your test report, for your tutor to review. Feel free to share additional thoughts or ask questions on your submission page.

**Bonus Task**

Run 1-2 additional usability tests on your new prototype using your updated test plan and make further updates to your prototype.