



A guide to buying the right user research platform

In 2016, the market's key competitive differentiator will be the customer.



In today's competitive marketplace, a major component to building a great business is providing an incredible customer experience. Gartner predicts that in 2016, the customer experience will be the market's key competitive differentiator. Companies that focus on providing excellent customer experiences see the result in the bottom line. Over an eight-year period, an index comprising companies with high customer satisfaction scores outperformed the S&P 500 by 35 points.

Knowing that you're making the right decisions—for both your business and your customers—can make or break your success. So what's the best way to do this? You do it by knowing what your users and customers need, and turning those insights into action. And to do that, you need the right tools, starting with a user research platform.

JUSTIFYING BUDGET AND THE NEED FOR USER RESEARCH

User research can speed up the decision-making process, provide the insight you need to re-prioritize your road map, and make the difference when it comes to nailing your competitive advantage. But how do you go about finding the right solution? In this guide we'll provide you some tips and structure to:

- ① **Define your current situation**
- ② **Determine what you need**
- ③ **Set up a plan for success**
- ④ **Evaluate the vendors**

After you've completed all of the steps in this guide, you'll be ready to make an informed decision that will meet your organization's needs. Let's get started!

To find the right solution you'll need to understand what your organization needs, which will help you understand and evaluate each vendor's systems and services when you're ready. In the following sections we'll help you map out this information.

Define your current situation

Using the guided questions below, take a few minutes to clarify your current situation to identify what you really need.

For example, what are the key initiatives within your business where data and research are used to make decisions (i.e., building and announcing new product features, or marketing campaigns):

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Now, identify which of the above initiatives are critical to your (or your team's) individual success and why.

Is anyone in your company currently running any consumer insights studies or user research?

Yes ☐ No ☐

How is this research handled? Who does the actual work? How many hours per week are dedicated to this research by that person (or team)?

How easy is it for you to get actionable insights from your current research initiatives?

How often do you receive (or make) requests for research to be done?

Are there others in your organization who could benefit from research findings, but aren't right now?

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How mature is your organization's development and design process?

Determine what you need

Identifying exactly what you need from a user research platform can be a challenge—especially if you've never used one before. We find the easiest way to pinpoint what you need is to look beyond a slick interface and features, and define a scenario (or two) that resonates with your situation. By looking at what you already have (or don't) it will be much easier to determine what you'll need to move forward.

Review the scenarios below to determine where your organization fits, including the types of studies and research we'd recommend at each stage.

SCENARIO 1 | We haven't designed anything yet or we have an existing design, but we're thinking of redesigning.

This is a great opportunity to gather information about people's needs, behaviors, and requests so you can provide an experience that meets their expectations.

In this scenario, we suggest:

- Figuring out what users really need and want by observing them in context
- Asking target users about their behaviors, preferences, attitudes, and opinions
- Evaluating what your competitors are doing and where the opportunities are
- Measuring your current UX, benchmarking against it as you iterate and improve

SCENARIO 2 | We're in the design phase, but we haven't launched anything yet.

If you have some sketches, wireframes, or a prototype, you can put it in front of your target audience and get feedback on interactions, content, and look and feel. The earlier you identify issues, the easier (and cheaper) it is to fix them.

In this scenario, we suggest:

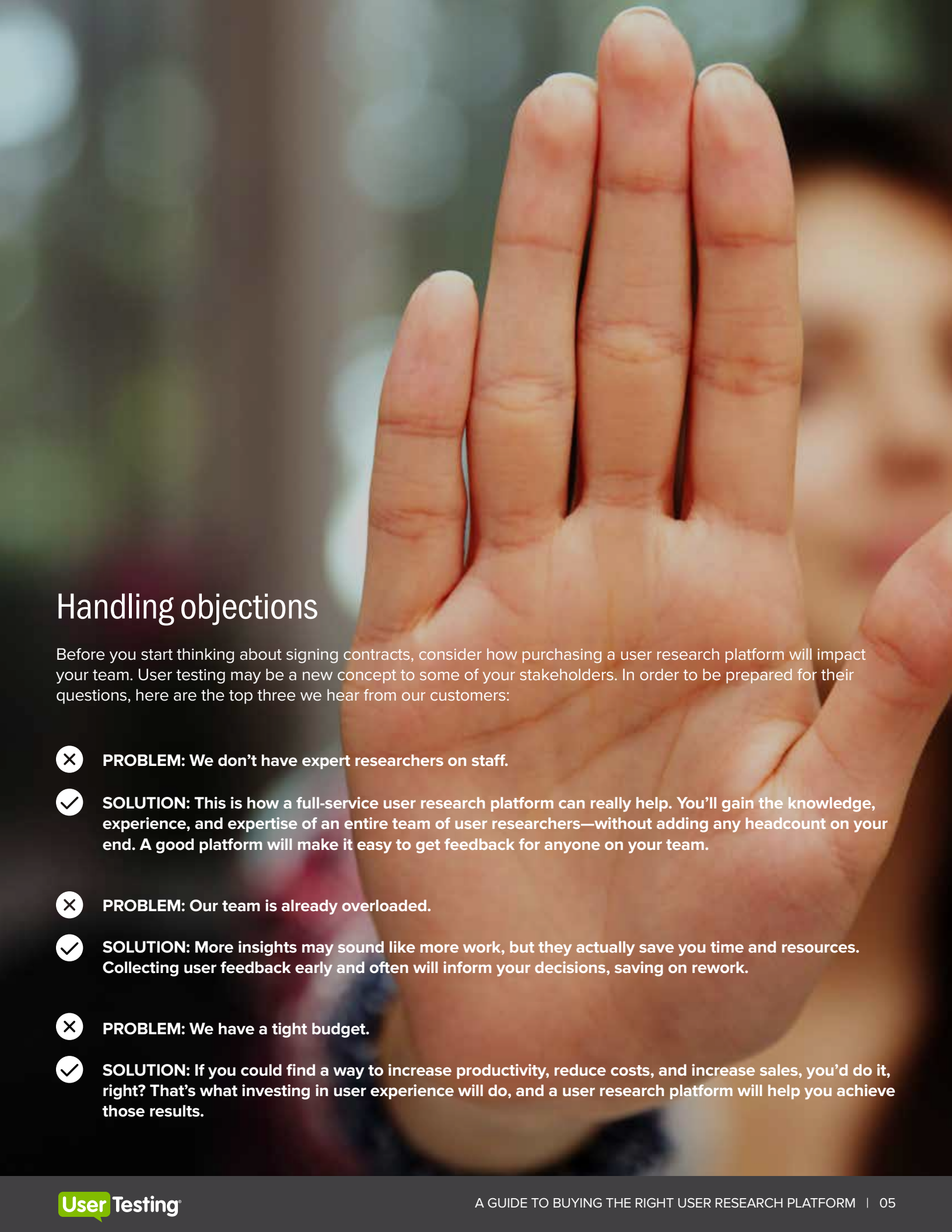
- Gathering data for designing key user flows, navigation, and structure
- Putting designs in front of users and getting feedback

SCENARIO 3 | We just launched something brand new, or we have an existing design and want to know how it resonates with users.

If you've just launched a new product or offering, you can get quick feedback from your target audience. You can see if the design meets users' expectations and how it fits into the lives of your target audience.







In this scenario, we suggest:

- Putting designs in front of users and getting feedback
- Getting ideas for A/B studies to understand why one version converted better than another
- Getting a pulse on your current experience, to measure against it as you iterate and improve, or benchmark your new design against your previous design
- Measuring engagement to see how an experience fits into the lives of your users in their natural settings
- Evaluating your product or offering across multiple channels and touchpoints to better understand your omnichannel customer experience



Handling objections

Before you start thinking about signing contracts, consider how purchasing a user research platform will impact your team. User testing may be a new concept to some of your stakeholders. In order to be prepared for their questions, here are the top three we hear from our customers:

-  **PROBLEM:** We don't have expert researchers on staff.
-  **SOLUTION:** This is how a full-service user research platform can really help. You'll gain the knowledge, experience, and expertise of an entire team of user researchers—without adding any headcount on your end. A good platform will make it easy to get feedback for anyone on your team.
-  **PROBLEM:** Our team is already overloaded.
-  **SOLUTION:** More insights may sound like more work, but they actually save you time and resources. Collecting user feedback early and often will inform your decisions, saving on rework.
-  **PROBLEM:** We have a tight budget.
-  **SOLUTION:** If you could find a way to increase productivity, reduce costs, and increase sales, you'd do it, right? That's what investing in user experience will do, and a user research platform will help you achieve those results.

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Set up a plan for success

Now that you've assessed your current situation and know the types of insights you're looking for, it's time to create a vision for how a user research platform can help your company succeed. The following questions and exercises will help you build a case for budget and ensure that any purchase you make will be fully utilized.

Q: Who in your company will make use of new research findings?
Who will own it for each team?

A: Product: _____
Engineering: _____
Marketing: _____
UX / Design: _____
Customer Experience: _____
Consumer Insights: _____

Q: What are several studies that you'd like to conduct?

Example: Would participants recommend our new beta product to their colleagues?

A: 1. _____
2. _____
3. _____
4. _____
5. _____

Q: What are your short-term goals following the implementation of a user research platform?

Example: Before we launch our new mobile app we will know if the onboarding experience is simple and easily understood.

A: 1. _____
2. _____
3. _____
4. _____
5. _____

Q: What are your long-term goals following the implementation of a user research platform?

Example: By the end of this year we'll set up monthly usability benchmarking of our core user paths on both desktop and mobile.

A: 1. _____
2. _____
3. _____
4. _____
5. _____

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Evaluate the vendors

Now that you've established what you need, and developed a road map for success, it's time to start evaluating vendors. The best way to get to know your options is to take a peek under the hood. Choose your top three options, and schedule a demo with each. The demos will give you a hands-on introduction to each solution, and will give you the opportunity to get all your questions answered.

The answers you've provided in the previous exercises will help guide you when comparing providers. Follow these steps to find the vendor that's right for you.



MAKING YOUR DECISION

By now you should have a pretty good idea of which providers can meet, or exceed, your expectations. After going through these exercises, you'll be armed with the information you need to justify your budget and ultimately help you choose the right user research platform. Now all you need to do is make a decision! We know. It's easier said than done.

To help you connect all the dots, we're leaving you with a handy checklist to help you find the right user research platform for you. Good luck, and happy testing!

3 things to consider as you enter the demo phase:

► Is there a live demo?

Screenshots may mean that the product won't be suited to run at the speed that you'll be comfortable with.

► How often do they mention other platforms?

Oftentimes companies that are vying for your attention against a rockstar competitor or industry leader end up talking more about 'the other guy' and less about themselves.

► Can you take a test drive?

If you're looking at spending a large sum on a solution, you might be able to get a free trial or a full Proof-of-Concept. Digging into the platform yourself is a great way to get an inside look at the value it can provide.

Use this guided checklist to take notes as you learn about the vendors you meet.

Vendor evaluation checklist



STUDY PARTICIPANTS

How many participants can I test with?

If we want to use a list of participants that we've hand-picked already, can we import them somehow?

How are participants chosen? Are they vetted in any way?

How much will it cost to get access to your panel of users?



DASHBOARD ORGANIZATION

If we have several teams using this solution, is there a way to organize our work?

Can we download the results to store in another place if we want?



STUDY TEMPLATES

Will it be possible to create and store a set of research templates that other people in our organization can use?

What happens if we start setting up a study but realize we're not ready to run it yet—do we lose our work?



TURNAROUND TIME

How quickly can we expect to get results?

What are your SLAs for studies?



DEVICE OPTIONS

What types of devices are we going to be able to test?

Which platforms do you currently support?

Are there any additional research options available - like in-the-wild, focus groups, or unboxing studies?



SEAT LICENSES

What is the cost per user or admin and is there a limit to how many seats we can have on the platform?

Is there admin functionality?

How do we share results with other teams or companies?



STUDY TYPES

Can we run moderated, focus group-style sessions with this solution?

Is it possible to run a longitudinal study with the same set of participants over a longer period of time?

Can we test our mockups and prototypes?

Can we test an unreleased mobile app?

Are there any additional research methodologies your platform supports?

Do you partner with any other companies? If so, what are the benefits to your customers? How do they work together?



RESULTS AND REPORTS

What are the exact deliverables we can expect with this solution?

Do you offer additional analysis and executive summaries I can easily share with others?

What types of reports are most commonly created or used by your existing customers?



EXPERT RESOURCES

What's the background of your key employees?

Do you have a training program for new users?

Do you provide additional resources and tools to help our team get up to speed and stay informed?

Is there an expert who can help us launch our studies?

Would it be possible to have your team do all of the work for us? How much will that cost?

What are your customer support hours, and how do we get help when we're in a crunch?



Create great experiences

UserTesting is the fastest and most advanced user experience research platform on the market. We give marketers, product managers, and UX designers on-demand access to people in their target audience who deliver audio, video, and written feedback on websites, mobile apps, prototypes, and even physical products and locations.

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