Evaluative Research and Testing

Research strategy and usability testing with mid-fidelity prototypes

34 Pages →

The design team handed us a figma file with dozens of pages and said "have at it"

The **problem** situation: evaluate mid-fidelity prototypes for usability

The current focus in the Product Management Division is a new 'Unified Platform' that combines two of Candid's current products. During a meeting at the end of a previous sprint, the UX Design team shared their progress on the designs for the upcoming beta platform. They asked us to test them so they could iterate on our feedback before sending final designs off the engineering team. There were no specific methods or research questions given to us at the start, and deliverables were not specified.

My Approach
- Establish familiarity and understanding
- Identify research questions and/or goals
- Select method(s)
- Conduct the research
- Analyze data
- Identify insights
- Present and share with relevant stakeholders

Constraints
- Quick turnaround. We only had two weeks to familiarize ourselves with the designs, choose a research method(s), find users, conduct the research, analyze the data, identify insights, and share our results.
- The prototype is only partially interactive. Individual pages are functional, but it is not possible to navigate from one page to the next across tasks.

Establishing familiarity and understanding, and identifying research questions and goals.

I started by setting up separate meetings with two people from the design team to help me identify what they were hoping to gain from our research, and also to help me walk me through some of the designs in the new prototype. I separated what I learned from them into two categories.

Firstly, **what are we looking to learn about?'**. This included things like specific designs for placeholder text variants, search boxes, advanced search variants.

The second category was **'what are we looking to understand?'**. This included questions like: Is the new prototype effective and relevant to user tasks?; Do features meet user expectations?

Selecting a method and conducting research.

After becoming familiar with the prototype and establishing our research goals, we ended up selecting two methods that would help us meet the needs of our project. Our primary method would be usability testing, along with a supporting survey with more users that could potentially provide some additional confidence in our findings. My task was the usability tests. I began by developing a semi-structured protocol, combining the two categories of questions I gathered from the design team and using this to create user tasks and relevant questions that would provide insight into the designs. I could not share a link to the prototype, so I would be conducting the usability test entirely by sharing my screen. I followed best practices for solving this restraint by using a scenario-based testing approach, and asking participants to imagine that they themselves were in specific contexts completing the tasks I would be mentioning. As with the majority of user interviews I conduct, I also used a 'think-aloud' protocol to ensure robust qualitative data.

I also had a chance to use some of my UX Design skills. The prototype I had been given included pages for a mobile view, and one designer had requested that those be tested. However these pages were not formatted in a way that clearly revealed their identity as mobile screens. To get better data from the usability tests, I formatted those pages into higher fidelity mobile screens, differentiating them from the rest of the desktop designs.

I then used a software called 'User Interviews' to find participants by writing a screener survey and identifying specific user characteristics. I conducted 5 usability interviews between 40-45 minutes each, and uploaded transcribed recordings of every session onto Dovetail, an online qualitative analysis software.

Analyzing data, identifying insights, and presenting to relevant stakeholders.

For this case study, I won't go into extensive detail on data analysis. To learn about my qualitative analysis process, please see Case Study #2 'Discovery Research and Qualitative Analysis'. After turning my findings into themes and insights, my manager shared the data from the surveys he had made. Putting it all together, I created a confluence document that I could use for the 2 scheduled presentations for this research project. One was with the design team, and the other at a larger biweekly system demo for the product management division.

When creating research presentations, I typically try to include different types of data along with my insights and findings in order to keep my audience (the stakeholders) engaged. For example, my document included quotes, interview clips, and visual representations of the survey findings as evidence for the insights and themes I was presenting. After sharing our findings with the design team, we had one or two more meetings answering additional questions and identifying priorities for the upcoming sprint. 2 months later, the beta platform went live, including the improvements that had been iterated upon as a result of our research findings.

Takeaways and reflection:

- This was my first time creating a usability test protocol, and it was a good opportunity to learn how to ask users the right questions. I learned that its helpful to more consistently try and probe for motivations and mental models through open-ended inquiries instead of only using specific and targeted questions. Instead of saying 'would you use this feature', it's better to say something like 'how would you use this page to complete a task?' In the future I will be conscious of this to ensure that the value of our interview findings justifies that method's usage over just using a cheaper and easier alternative like a survey or automated tool.

- I am a big fan of the first question that I consistently use in my user interviews: *"Let's start at the beginning, I'd like to learn a little bit about your work — tell me about where you work and your role at work."* It really sets up a conversation nicely because it gets the participant talking about something they are knowledgeable about(themselves), and sets up a short conversation that helps them feel more comfortable.

- Thanks to my work in industry and in school, I'm beginning to understand more and more that methods are not always about following one specific process that cannot be altered or changed. Usability tests can be modified to meet the needs of a project, like depending on how interactive the prototype is, or whether its low to high fidelity.

Thank you for reading!

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