Elizabeth Goodman, Mike Kuniavsky, and Andrea Moed

SECOND EDITION

A Practitioner's Guide to User Research

OBSERVING THE USER EXPERIENCE

MORGAN KAUFMANN

Observing the User Experience

A Practitioner’s Guide to User Research

Elizabeth Goodman

Mike Kuniavsky

Andrea Moed

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Biographies

Mike Kuniavsky is a user experience designer, researcher, and author. A 20-year veteran digital product development, Mike is a consultant and the co-founder of several us experience-centered companies: ThingM manufactures products for ubiquitous computing a the Internet of Things; Adaptive Path is a well-known design consultancy. He is also t founder and organizer of Sketching in Hardware, an annual summit on the future of tools f digital product user experience design for leading technology developers, designers, a educators. Mike frequently writes and speaks on digital product and service design and wor with product development groups in both large companies and startups. His most recent boo is *Smart Things: Ubiquitous Computing User Experience Design*.

Andrea Moed believes that research is essential in designing to support huma relationships. She has been a design researcher and strategist for over 15 years, observi users of websites, phones and other mobile devices, museums, retail environments, a educational and business software. She is currently the Staff User Researcher at Inflection, technology company working to democratize access to public records. Andrea has master degrees from the Interactive Telecommunications Program at New York University and t UC Berkeley School of Information and has taught at the Parsons School of Design in Ne York. Her writing on design and technology has appeared in a variety of publications.

Elizabeth Goodman's writing, design, and research focus on interaction design for mobi and ubiquitous computing. Elizabeth has taught user experience research at the University California, Berkeley and site-specific art practice at the San Francisco Art Institute. As we she has worked with exploratory user experience research teams at Intel, Fuji-Xerox, a Yahoo! Elizabeth speaks widely on the design of mobile and pervasive computing systems conferences, schools, and businesses. She has a master's degree in interaction design from t Interactive Telecommunications Program at New York University. Her scholarly research interaction design practice has been supported by a National Science Foundation Gradua Fellowship and an Intel Ph.D. Fellowship.

Preface

Why This Book?

Many people in digital product and service development never do user research. We ofte hear people say things like: “Putting a product in front of consumers will be expensive—an besides, we need to ship next month!” Or: “Usability research limits design creativity.” An “It’s not even necessary because the developers are themselves part of the community users and thus instinctively empathetic to what those other users find useful or usable Finally: “And besides, [insert the name of famous company here] doesn’t do it!”

You, clearly, think otherwise. You think it’s important to know who is using the produc you’re making. And, you know, you’re right. Finding out who your customers are, what the want, and what they need is the start of figuring out how to give it to them. Your custome are not you. They don’t look like you, they don’t think like you, they don’t do the things th you do, they don’t share your expectations, assumptions, and aspirations. If they did, the wouldn’t be your customers; they’d be your competitors.

This book is designed to help you bridge the gap between what you think you kno about your users and who they really are. It’s not an academic treatise. It’s a toolbox concepts to understand how people experience products and services. The techniques—take from the worlds of human-computer interaction, marketing, and many of the social scienc —help you know who your users are, to walk in their shoes for a bit.

In addition, the book is about the *business* of creating usable products. It acknowledg that product development exists within the complexities of a business venture, where th push and pull of real-world constraints do not always allow for an ideal solution. Use research is a dirty business, full of complexities, uncertainties, and politics. This book will, it serves its purpose, help you tame some of that chaos. It will help you gain some clarity an insight into how to make the world a little better by making products and services mor thoughtfully.

Who Are You?

This book was written for people who are responsible, in some way, for their products’ us experience. In today’s digital product and service development world, this could be an number of people in the trenches. In fact, the responsibility may shift from person to perso as a project progresses. Basically, if you've ever found yourself in a position where you a answering for how the end users are going to see the thing you're making, or how they' going to interact with it—or even what they're supposed to do with it—this book is for you.

This means that you could be:

- A program manager who wants to know how to prioritize a team's efforts
- A designer who needs to create and refine new ways to interact with and through digit information
- A marketing manager who wants to know what people find most valuable in your product
- An information architect who needs to pick an organizational scheme
- A programmer creating a user interface, trying to interpret an ambiguous spec
- A consultant trying to make your clients' products better
- An inventor who wants to make a product people will love

Regardless of your title, you're someone who wants to know how the people who use th product you're making perceive it, what they expect from it, what they need from it, an whether they can use what you've made for them.

What's in This Book?

This book is divided into three major sections. The first section (Chapters 1 through describes why end user research is good, how business tensions tug at the user experienc and presents a philosophy for creating useful, desirable, usable, and successful products.

It also contains a short chapter on a technique that will teach you in 15 minut everything you need to know to start doing usability research tomorrow. Really.

The second section (Chapters 5 through 16) is a cookbook with a dozen techniques f understanding people's needs, desires, and abilities. We have thoroughly updated this sectio for the second edition, adding new chapters and revising existing ones to reflect current be practices in 2012. Some of the chapters are completely self-contained, such as the chapters o surveys and usability tests. Others describe supplementary activities, such as collage and ma making, to use in conjunction with other techniques. We don't expect you to read thes chapters in one sitting, in order. Far from it! We assume that you will pick up the book whe you need it, reading chapters to answer specific questions.

The third section (Chapters 17 through 19) describes how to take your results and u them to change how your company works. It gives you ideas about how to sell your compa and how user-centered design can make your company run better and more profitably.

Best practices in research change quickly, as do preferred tools. We have moved much the reference material in the previous edition to the book's website. Vis www.mkp.com/observing-the-user-experience for the most up-to-date information on too and tips, as well as template consent forms, checklists, reports, and other documents.

What's Not in This Book?

This book is, first and foremost, about defining problems. All the techniques are geare toward getting a better understanding of people and their problems. It's not about how solve those problems. Sure, sometimes a good problem definition makes the solution obviou but that's not the primary goal of this text.

We strongly believe that there are no hard and fast rules about what is right and what wrong when designing experiences. Every product exists within a different context th defines what is "right" for it. A toy for preschoolers has a different set of constraints than stock portfolio management application. Attempting to apply the same rules to both of the is absurd. That is why there are no guides for how to solve the problems that the techniques help you to define. There are no "top-10" lists, there are no "laws," and there a no universally reliable heuristics. Many excellent books have good ideas about how to sol interaction problems and astute compilations of solutions that are right much of the time, b this book isn't one of them.

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PART I

Why Research Is Good and How It Fits into Product Development

Chapter 1 Introduction

Chapter 2 Do a Usability Test Now!

Chapter 3 Balancing Needs through Iterative Development

Chapter 1

Introduction

User research is the process of figuring out how people interpret and use products ar services. It is used everywhere from websites, to mobile phones, to consumer electronics, t medical equipment, to banking services, and beyond. Interviews, usability evaluation surveys, and other forms of user research conducted before and during design can make th difference between a product or service that is useful, usable, and successful and one that’s a unprofitable exercise in frustration for everyone involved. After a product hits the marke user research is a good way to figure out how to improve it, to build something new—or t transform the market altogether.

It may seem obvious that companies should ensure that people will use their products o services. But even industry giants can lose sight of this common-sense proposition. In a cros industry study of 630 U.S. and UK executives by the consulting firm Accenture, 57% of th executives reported that “inability to meet customer needs” had resulted in failures of ne products or services. Fifty percent further blamed the “lack of a new or unique custome perceived value proposition.”

As these executives learned the hard way, being first to market with a new product o service isn’t enough. Companies need products that people desire, that fulfill human need and that people can actually use. After a product or service fails, getting a company back o track can take significant effort to reconnect with one’s audience and integrate thos understandings back into standard business processes. That means user research, as the icon Danish toymaker LEGO discovered.

Learning from LEGO

In the 1980s and 1990s, the LEGO Group expanded in all directions. It introduced product such as computer games, action figures, and television shows, that veered away from i famous core business of pop-together plastic pieces. It opened amusement parks and license its name to other companies. And it encouraged unfettered creativity in designer teams. Or result was the futuristic restyling of its classic flagship, the LEGO City product line, and th creation of many complex new lines with specialized pieces.

Yet by the early 2000s, the LEGO Group was struggling. Recessions in major markets ha hurt overall sales. It also didn’t help that competitors had taken advantage of the LEG

Group's recently expired patents. But one of the company's biggest problems was that ki simply didn't like the new designs. Notably, some redesigned lines had crashed more tha others. The City product line, for example, had generated about 13% of the company's *enti revenue* in 1999. Only a few years later, it accounted for only 3%. The line's profitability ha "literally almost evaporated," an executive vice-president told business reporter Jay Green At the same time, manufacturing costs had skyrocketed. Instead of doing more with th components they already had, the new product lines had multiplied the number of expensiv new components. With sales down and production costs up, the company was hemorrhagin money. The LEGO Group was losing almost $1 million every day. It was more than a crisis; looked like a death knell for a beloved institution.

In 2004, a new CEO, Jørgen Vig Knudstorp, took a "back to basics" approach. H abandoned some of the new products—the amusement parks in particular—and returned the core product: the plastic brick. Further, he demanded that designers cut the number specialized components. But he also directed the company to pay more attention to its co constituency: kids. Knudstorp told *Businessweek*, "At first I actually said, let's not talk abo strategy, let's talk about an action plan, to address the debt, to get the cash flow. But afte that we did spend a lot of time on strategy, finding out what is LEGO's true identity. Thin like, why do you exist? What makes you unique?"

To find out what made LEGO unique, Knudstorp turned to user research. Over the cours of a year, LEGO sent user researchers—who they called "anthros"—to observe famili around the world. These anthros focused on culture: the meanings that kids found in favori possessions; how, where, and why they played; and differences in parenting and play styl across the regions where LEGO did most of its business: Asia, Europe, and the United State They went to kids' homes and interviewed them, and then watched them play—not just wi LEGO products, but with all kinds of objects.

Through its research, LEGO arrived at a renewed understanding of the meaning of play children. Insights from the anthros' visits had emphasized the way that toys fit into kid storytelling. Fire trucks didn't need to look outlandishly cool to be loved; they needed to into kids' existing stories about firefighters. Research also led to an enhanced appreciation cultural differences in play. Japanese families, for example, tended to strictly separa education and play; selling LEGO products as "educational" blurred that difference f parents, making them unsuitable either as toys or as teaching devices. Boys in the Unite States, by contrast, were highly supervised most of the time. For them, playing with LEG bricks was one of the few parent-approved activities that allowed unstructured time alone.

Most importantly, the LEGO design team re-evaluated the importance of difficulty. "Yo could say,” wrote *Businessweek* reporter Brad Wieners, “a worn-out sneaker saved LEGO.” the early 2000s, the company had attributed its failures partially to the popularity electronic games. But what did kids see in these games? For years, the company had believe that kids wanted a “plug and play” experience: easier roads to speedy success. So the simplified their models. The anthros came back from time spent with kids telling a differe story.

The head of LEGO Concept Lab told *Businessweek*, “We asked an 11-year-old German bo ‘What is your favorite possession?’ And he pointed to his shoes. But it wasn’t the brand shoe that made them special. When we asked him why these were so important to him, showed us how they were worn on the side and bottom, and explained that his friends cou tell from how they were worn down that he had mastered a certain style of skateboardin even a specific trick.” The boys they had met, like the German skater, were interested experiences of “mastery”: learning skills and, as with the worn-down sneaker, demonstrati that mastery to others. Through observing kids play and talking to them about their live LEGO designers realized that they had misunderstood what computer games *meant*.

In response, the designers went back to the drawing board. While obeying the mandate reduce the number of different pieces, designers also worked with researchers to suppo experiences of mastery. Models might use fewer specialized components, but they could st be satisfyingly challenging. Instead of aiming for immediate gratification, the LEGO designe drew from notions of progression built into computer games: winning points, leveling up, a entering rankings. Designers also completely reworked their LEGO City line. Out with t futuristic styling, in with fire trucks that looked like, well, fire trucks.

But that’s not the whole story, though it’s a big part. At the same time, LEGO also turne its attention to a large group of devoted customers who hadn’t strayed: adults. Ea individual adult enthusiast spent far more on LEGO products in a year than most kids wou ever spend in a lifetime. However, the company’s revenue overall overwhelmingly ca from kids—boys ages 7 to 12, to be exact. So most LEGO execs didn’t see any reason cultivate older customers (not to mention girls, but that’s a different story). In fact, t company had notoriously kept adult fans at arms-length. Communicating with older fa could inspire new product ideas…and then invite lawsuits over the profits from those idea But the problem with adult fans for LEGO management wasn’t just lawsuits. “T impression,” Jake McKee, a former LEGO Group community manager, bluntly told conference audience in 2009, “was that these guys are weird.”

“And yes,” McKee continued, “some of them *were* weird.” But their exuberant love f LEGO kits, he pointed out, was bringing the struggling company a lot of positive attentio

On their own initiative, adult fans built massive LEGO installations in shopping mall attracting attention from tens of thousands of kids. Their efforts brought them stories c television and in newspapers. And on the Internet, grown-up, big-spending fans had built thriving ecosystem of fan forums and marketplaces.

At first, the websites had taken the company aback. Tormod Askildsen, Head c Community Development at LEGO, told *Ericsson Business Review*, at first, “we didn’t real like it and we were a bit concerned.” McKee and other members of LEGO’s communi relations group decided to change that attitude. McKee and his group started by meeting adu fans where they were most comfortable: on online forums, at meetings, even at bars. The started with no budget and no permission, doing “the smallest thing we could get away with Over time, they built a pilot program, developing long-term relationships with a few “LEG Ambassadors” as eyes into the adult fan community. By 2005, they had come far enough post requests for product suggestions on popular fan websites. In 2009, Askildsen sai “People from my team communicate with this group more or less on a daily basis, discussir different themes, ideas or to brainstorm.” In the end, LEGO even hired adult fans a designers.

While championing a “back to basics” approach for kids, LEGO managers had learne enough from the adult fan community to add special products for them. First came the $50 Star Wars Millennium Falcon kit, which became extremely popular. In 2006, the compar added the Modular Buildings line, a set of complex kits with sophisticated architectur details. Most importantly, LEGO began to take their adult fans seriously as a source of idea and inspiration. “They realized they could use adults to influence kid fans, and kids to excit adult fans,” said McKee. Today, the company even launches entirely fan-designed lines.

Besides controlling manufacturing costs, this strategy turned sales around. After th redesign, LEGO the City line was responsible for 20% of the company’s revenue in 2008- regaining its original place and even exceeding it. The executive vice-president told Green “It has refound its identity.” Between 2006 and 2010, company revenue increased 105% growing even in downturns. “The fourth quarter of 2008 was a horror show for mo companies,” an industry analyst told *Time* magazine. “And LEGO sailed through like it was r problem.” Revenue continued to grow in 2009 and 2010. In 2011, LEGO made $1 billion the United States for the first time ever.

As the LEGO Group thrived, so did its commitment to user research. As well as integratir desk research, field visits, and expert interviews into their idea generation process fo existing lines, the company sent out the anthros again for another project—this time, t develop new products for an audience the company had long ignored: girls.

By carefully observing and engaging with its users, the LEGO Group discovered ways t overcome its most daunting problems. User research showed the company how to redesign i products to delight its core audience of kids; how to build strong relationships with adult fa and make use of those relationships in marketing and product development; and how t control production costs even as it introduced new products. The most expert toymaker c management consultant in the world could not have told LEGO designers how to do the things. They had to learn it from their customers.

LEGO Lessons

The problems you and your company need to address might not be as all-encompassing a those faced by the LEGO Group, but the toymaker's story includes some important lessons f user experience research that we want to emphasize. The obvious lesson, of course, is th knowing your customers is important, and that it takes work! That shouldn't surprise anyo who's gotten this far into this book. But there are other, less obvious, points.

Don't Take Your Core Audience for Granted

Neither the LEGO Group's storied reputation as a children's toymaker nor a knowledge c child development theory could guarantee success with kids. Instead, the company had to r engage with kids directly in order to revitalize its design strategy.

Look Beyond Your Mainstream or "Average" Users

The company gained inspiration from adult fans' creativity and enthusiasm. Moreover, the found new profits when they designed for the specific tastes of their adult fans, an audien they had previously ignored.

Research and Design Innovation Are Perfectly Compatible

There are some persistent myths about user research: that it stifles creativity; that it's on good for incremental improvements; that real advances only happen when technic innovation drives product development. In the case of the LEGO Group, none of that w true. After an investment into user research and outreach, LEGO didn't stop making ne products—in fact, it continues to launch new "brick" product lines and new digital produc based on research. The toymaker just systematically, and strategically, redirected its desi efforts.

Research Insights Are Most Transformative When They Are Constructive

According to business reporter Brad Wieners, the company's research "shattered many of th assumptions” it had about kids’ desire for easy success—but also replaced it with a ne paradigm, that of “mastery.” Instead of leaving their corporate clients empty-handed, th anthros introduced a new model of play to replace the one they discredited.

User Research Can Have Systemic Consequences

As Wieners writes, “So while it didn’t take a genius or months of research to realize it mig be a good idea to bring back the police station or fire engine that are at the heart of LEGO most popular product line (LEGO City), the ‘anthros’ informed how the hook-and-ladder motorcycle cop should be designed, packaged, and rolled out.” Then, to make sure that the stayed connected to their customers, the company integrated early user research into the Innovation Model, a company-wide sequence of activities guiding new product developmen User research typically drives nuts and bolts decisions about the object being made. But yo get the most value from user research when all parts of the company take part in interpretin it, so that it impacts not just the design of the product, but also the design of the busine itself.

And finally:

Research Needs Supporters

LEGO management didn’t just send out researchers once; they integrated research activiti into everyday business processes. The fate of research insights isn’t under the control researchers; it takes collaborative relationships across companies, and support fro management, to influence product development.

In Conclusion

This book is about the knowledge that will help you create and sustain great product an service experiences. It will help you avoid situations like that faced by the LEGO Group whi retaining and cultivating the creativity that leads to innovative, exciting, unique, an profitable products and services. It provides a collection of user experience research tools help you explore how products and services can engage with people’s desires and abilities.

Our philosophy is not about following strict procedures to predictable solutions. It’s abo defining (and redefining) specific problems and opportunities—and then creative responding to them. The ultimate goal of these tools is not merely to make people happy; it to make *successful products and services* by making people happy. With a set of tools to hel figure out how people view the world, you are much more likely to create things that hel people solve problems they really care about, in ways that delight and gratify them.

Do a Usability Test *Now!*

Basic user research is easy, fast, and highly effective. Some forms can be done with a product. The question is whether you want to do it yourself. And there's only one way to fi that out: try it. In this chapter, you will learn a fast and easy user research technique b doing a usability test with your friends and family. After 15 minutes of reading and a coup hours of listening, you will have a much better understanding of your customers and whic parts of your product are difficult to use.

The *usability test* will tell you whether your audience can use what you've made. It hel identify problems people have with a specific interface and reveals difficult-to-complete tas and confusing language. Normally, usability tests are done as part of a larger research proje and involve extensive preparation and analysis. That's what Chapters 4 through 16 of th book are about. However, in the interest of presenting something that's quick and th provides good bang for the buck, here are two versions of a *friends and family usability tes* It's designed to let you get almost immediate feedback on an interface with minim overhead. If you're reading this chapter in the morning, you could be talking to people by th end of the workday and rethinking some functionality by tomorrow. But give yourself a da or two to prepare if this is your first time conducting user research.

You will need some representation of an interface to take advantage of this technique. A working product or semifunctional prototype will be easiest at this stage, but you can also ask people to evaluate a paper sketch.

If you don't have any interface representation handy, then it's a bit too early for you to try this out. You should use on of the research techniques that will help you start designing, such as interviews or a site visit. These are discussed i Chapters 6 and 9 of the book, respectively.

But if you just want to try out this technique and don't need it to apply to your own work immediately, you can use an interface that's already familiar to you—whether a website, a kiosk, or an appliance.

A Nano-usability Test

Here's the nano-size version of a guerrilla usability test. This summary will get you started less than a minute, not counting the time you spend reading this paragraph. Yes, you'll g closer to a "real" usability evaluation with the 15-minute model. But follow these five ste to get an immediate taste of user research:

1. Find *one* person who cares about your product. It doesn't matter who.
2. Arrange to watch them use that product. Go to their house; meet at a café; use scree sharing. It doesn't really matter, as long as you can clearly see what they're doing.
3. Ask them to use the product to do something they care about: contact a friend; coo dinner; buy something. Whatever.
4. Final step: watch them do it. Don't ask questions. Don't tell them what to do. Don't sa anything. Just watch.
5. Ask yourself: what did you learn?

And…you're done!

You may be wondering: that's it? That's all there is to usability? Why do consultanci charge so much money for it, then? Actually, no. There's a lot more science, craft, and art usability than we can get across in under a minute. But usability isn't brain surgery, and it important to realize that anyone can start practicing the basics in under a minute.

A Micro-usability Test

The micro-usability test, which we'll explain below, is closer to what a full-fledged usabilit evaluation would look like. Try this after trying the nano-usability test, or if you've got som more time to spare. It'll still take you less than 15 minutes to figure it out.

There are four major steps in the process of conducting a usability test.

1. Define the audience and their goals.
2. Create tasks that address those goals.
3. Get the right people.
4. Watch them try to perform the tasks.

Define the Audience and Their Goals

> An evaluation always proceeds from 'why does this thing exist?'
>
> Dave Hendry, Associate Professor, University of Washington Information School

You are making something for some reason. You have decided that some people in th world can make their lives better with your idea. Maybe it helps them buy somethin cheaper. Maybe it's to get them information they wouldn't have otherwise. Maybe it hel them connect with other people. Maybe it entertains them.

Regardless, you are making something that you feel a specific group of people will fi valuable. For them to get that value, there's something they have to do. Usually, it's sever things. For a website selling something, it can be “Find the widget, buy it, and subscribe the newsletter.” For a matchmaking site, it can be “Find someone interesting, write him note, and send it.”

So the first thing you should do in a usability test is to figure out whom the site is fo What nouns and adjectives describe the people who you expect will use it most often? Wh differentiates them from everyone else? Is it their age, their interests, their problems? It probably all of the above, and more.

For example, say that you want to examine the usability of the browsing and purchasi user experience of an online cutlery store. You can quickly create an audience definition f the site’s audience.

People who want to buy cutlery.

But this isn’t very specific. My grandmother regularly buys plastic forks for family picnic but she’s not going to be doing it through a website. So the definition should have a litt more detail.

The target user audience are people who

- Want to buy high-end cutlery
- Are value conscious
- Want a broad selection
- Shop online
- Are not professional cutlery buyers

Next, figure out what the key product features are. Write down what your product about. Why are people going to use it? Why is it valuable to its users? If you were at a lou party and had 30 seconds to describe your site to someone who had never heard of it, wh you would tell them? Write it down.

forkopolis.com enables people all over North America to buy cutlery from one of the largest ranges available, featuring a the major luxury brands and the best designers. It allows for easy location of specific styles and pieces so that buyers ca quickly and cheaply replace a single damaged teaspoon or buy a whole restaurant’s worth of silverware.

Create Tasks That Address Those Goals

Now write down the five most important functions of the site. What should people be able do above all else? In a sales site, they should obviously be able to purchase things. But the should also be able to find them, whether or not they know exactly what they're trying buy. Furthermore, they should probably be able to find what's on sale and what's especially good value. Make a list, describing each function with a sentence or two.

Find specific items by style.

Buy by single item.

Buy by whole setting.

Find special offers.

Find information on returning merchandise.

In a couple of sentences describe a situation where someone would perform that functio written from his or her perspective. Call this a *task*. If "Find specific items by style" is one the functions, a task for it would be the following:

You decided that you want to buy a set of Louis XIV forks from forkopolis.com. Starting from the homepage of forkopolis find a set of Louis XIV forks.

Finally, order the tasks from the easiest to the hardest. Starting with an easy task mak people comfortable with the product and the process.

Get the Right People

Now, find some people who fit the profile you created in step 1. When doing a quick exerci like this, you can get a decent idea of the kinds of problems and misunderstandings that occu with real users by bringing in five or six people who resemble the people you expect will interested in your product. The fastest way to get such people is through the people yo already know. If you're in a large company, this could be co-workers from departments th have nothing to do with your product. If you're in a small company, this can be your frien and family and your co-workers' friends and families. It can be people from the office dow the hall. It can be people off the street. As long as they're somewhat like the people yo expect to visit your site, it can be anybody who is unfamiliar with the product and unbiase toward it (so a doting grandmother and the CEO of your biggest competitor are probab excluded). Unless your product is designed for developers, avoid people who design market digital products and services for a living: they know too much.

Contact these people, telling them that you'd like to have them help you evaluate th effectiveness of a product you're working on. Don't tell them any more about it than th short description you wrote at the top of the task list. Tell them that no preparation

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