USER RESEARCH
GAIN INSIGHTS TO IMPROVE THE LIBRARY EXPERIENCE

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November 08, 2017 | Nordic User Group
User Research Agenda

- Why user research
- Research process
- Determining your research goal
- Choosing your research method
- Determining your sample
- Recruiting
- Writing your script
- Conducting your session/research
- Synthesis of findings
- Writing a report
- Tools and more resources
User research lets us understand how users interact with services and resources, so that we can respond more effectively to their needs with informed and inspired design solutions.
USER RESEARCH IN 7 STEPS

1. Objectives
   What are the knowledge gaps you need to fill?

2. Methods
   Choose a research method based on what you want to find out.

3. Tools
   Select the tool or service that best supports your research goals.

4. Recruiting
   Create and post a recruiting screener and confirm valid participants.

5. Design
   Design a set of tasks, questions, or write an interview guide.

6. Conduct
   Conduct research session and pay out the incentives.

7. Synthesize
   Summarize findings together with your team.

Source: https://uxmag.com/articles/remote-user-research-usability-methods
DETERMINING YOUR RESEARCH GOAL

- What do you want to know and why you want to learn that thing?
- What are your knowledge gaps?

  Some examples:
  - Who are the users?
  - What are their behaviors, goals, motivations, and needs?
  - Where do they have problems with their workflow?
DETERMINING YOUR RESEARCH GOAL

Exercise 1

- Who are your users?
- What do you want learn about your users?
  1.
  2.
CHOOSING YOUR RESEARCH METHOD

- Literature Review
- Usability Test
- Survey
- Mobile Usability Test
- A/B Testing
- Interview
- Persona
- Participatory Design
- Contextual Inquiry
- Diary Study
- Focus Group
- Focus Group
- Usage Analysis

Can people use it?

How do people use it?

What do people need?

Source:
When to Use Which User-Experience Research Methods https://www.nngroup.com/articles/which-ux-research-methods/
Heatmap using Qualtrics
User sessions

Debriefing

Affinity Mapping

Stakeholder Review

Contextual Inquiry (CI) Process
Eye Tracking and Emotion Analytics using iMotions
CHOOSING YOUR RESEARCH METHOD

Exercise 2

- Pick 1-2 research methods that best suits your research.
- Why did you choose that method?
CHOOSING YOUR RESEARCH METHOD - Usability Testing

- Focus on what users do, not what they say they would do
- Evaluate the performance of the interface and product
- Identify which part of the product works for your users and what fails
- Learn actual behavioral patterns
- Gain understanding of user goals, needs, motivations, and pain points
But how do you know your findings are applicable or extensible based on your sample?
Usability: Jakob says 5.
DETERMINING YOUR SAMPLE – Sample Size

User Research @EBSCO:

Usability sample size: 7–10 participants

Ethnographic sample size: Start with 12, end at 20+.

Recruit by persona? Yes

You:

Usability sample size: 5–7 participants

Ethnographic sample size: 8–10 participants

Recruit by persona? No
RECRUITING IN A NUTSHELL

- **Outreach** – Determine method of communication (Social media, email, flyers)
- **Catchy Phrases** – “What you have to say is important” or “We want your feedback”
- **Information Intake** – Goal is to protect the interest of the researcher and the participant
- **The “Ask”** – Sets the tone of the study and the expectation of the participant
- **Compensation** – Adding an incentive is a critical factor

Source: Kristen Arakelian, UX Recruiting Coordinator, EBSCO Information Services
Example of recruiting flyer

What You Have to Say is Important
We Want Your Feedback!

We are looking for students who are interested in participating in an upcoming usability research session. We’re looking to learn how you conduct research for school (Insert your goal).

You’ll meet with a researcher and will receive a $10.00 gift (incentive) as compensation for your time.

Coffee and snacks will also be available while testing is in session.

Open to undergraduate and graduate students (target participant).

During October 17-29 (dates and times), we’ll be hosting 30-minute sessions (length of the session). If you’re interested, please answer the following questions (intake questions), and we’ll get in touch regarding your availability. The study will take place in the library group study room (location).

Participation is voluntary. Your information is kept confidential and will only be shared with our research team for the purpose of this study.

Source: Kristen Arakelian, UX Recruiting Coordinator, EBSCO Information Services
DEVELOPING SCRIPTS

• Typically, a task will center around the testing of a primary feature. If you have any concerns that something on the site is not working, make sure to include it in your test.

• A script should include some background about the site, questions about the tester, and then 5-10 specific tasks to complete on the website.
DEVELOPING SCRIPTS

An example of a task would be:

• You have an assignment to write a 3-5 page paper on the economic impact of climate change. Find a peer-reviewed article that you could use in your paper.

• Imagine you are assigned to read the e-book version of "Strange Case of Dr. Jekyll and Mr. Hyde" by Robert Louis Stevenson. How would you find this? If it's available, show us how you would access the e-book.
## DEVELOPING SCRIPTS

Use other methods as needed:

<table>
<thead>
<tr>
<th>Method</th>
<th>Sample Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tasks</td>
<td>Can you draw a map of the library?</td>
</tr>
<tr>
<td>Participation</td>
<td>Can you show me how to download an eBook?</td>
</tr>
<tr>
<td>Demonstration</td>
<td>Show us how you search for a vlog on YouTube.</td>
</tr>
<tr>
<td>Role-Playing</td>
<td>I’ll be the student and you be the librarian and I’ll ask for help in narrowing my topic.</td>
</tr>
<tr>
<td>Observations</td>
<td>Look around apartment, office, coffee shop etc</td>
</tr>
</tbody>
</table>

Tips for writing effective user testing tasks:

• Clarity. Have a clear objective for each question or task in the test.
• Precision. Select your language carefully and avoid jargon and wording that will lead participants or give away key information about how to complete the task.
• Independent tasks. Each task should be able to be carried out on its own and not dependent on the completion of other tasks.
• Success criteria. Discuss and have agreement with your team on what success looks like for each task/question. There may be more than one answer.
• Pilot. Run a pilot study with 1-2 participants to confirm everything works before running it with all your participants.
PLANNING YOUR SESSIONS

• Researchers per session 1-3 max
• Schedule session for 30-60 minutes each, have break time in between sessions so that you can debrief with your team or get a break.
• Participants must sign release forms - consult your legal department or institutional review board (IRB) regarding rules for testing users.
• For researchers – recording app on a phone with enough storage space, notebook with enough blank pages, Internet connection, food, bio breaks
PLANNING YOUR SESSIONS

Other devices you may need: computer, microphone or phone, screen recorder (such as ScreenFlow, Camtasia), etc.

Tool for managing the usability testing schedule such as Doodle, Calendly, or Google Drive

Tool for storing documentation (e.g. consent form) and sharing session recordings, such as Box, Google Drive, or Dropbox

CONDUCTING YOUR SESSIONS

• Keep in mind that it’s not about you! You’re there to learn about “Jane”, to explore her world. Leave your assumptions and opinions behind before you enter the meeting room.

• Sit beside them (not across from them) if you are testing in person, so you can observe how the participants interact with what you’re testing.

• Encourage participants to think aloud - ask them to tell you what they are thinking, what they are trying to do, their thought process, questions that arise as they work, and how they feel at each step.

• Be objective and neutral. Never ask leading questions or show any positive or negative reaction. Be aware of your own expressions, body language and tone of voice (sometimes very subtle) that may influence your participant.

• Debrief with the team after each session.
DISTILLATION & SYNTHESIS

• Pay attention to what users do rather than what they say they do
• Separate out actual user behavior/responses and your own observations and comments
• Create a spreadsheet to log all the notes from each session in a consistent format, especially when you have more than one researcher. It may help you analyze the findings.
• Map notes into themed hierarchies that align with your subject categories (large groupings, such as “Search”, “The Library” etc.).
WRITING A REPORT

- Use participant quotes to illustrate pain points.
- Use screenshots to illustrate and reenact experiences.
- Use topic headings from research to guide categorization of findings.
- Tell the story of your users.
- *What we thought vs. what we learned* format works well.
ONLINE TESTING TOOLS

Moderated
- Webex
- Skype
- GoToMeeting
- Join.me

Unmoderated
- UserZoom
- Usertesting.com
- Loop11

More
- Survey Tools (SurveyMonkey, Qualtrics, Google Forms)
- OptimalSort

Source:
http://remoteresearch.ch/tools/
MORE RESOURCES

• User research, quick and dirty (Video)
  https://library.gv.com/user-research-quick-and-dirty-1fcfa54c91c4

• Why You Only Need to Test with 5 Users - Nielsen Norman Group
  https://www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/

• Overcoming Cognitive Bias in User Research
  https://npr.design/overcoming-cognitive-bias-in-user-research-e4082f4506a

• Templates and Downloadable Documents


QUESTIONS?

THANK YOU!

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