

Think like a researcher

Tips and lessons from UX Research at Shopify

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User Experience Research Lead

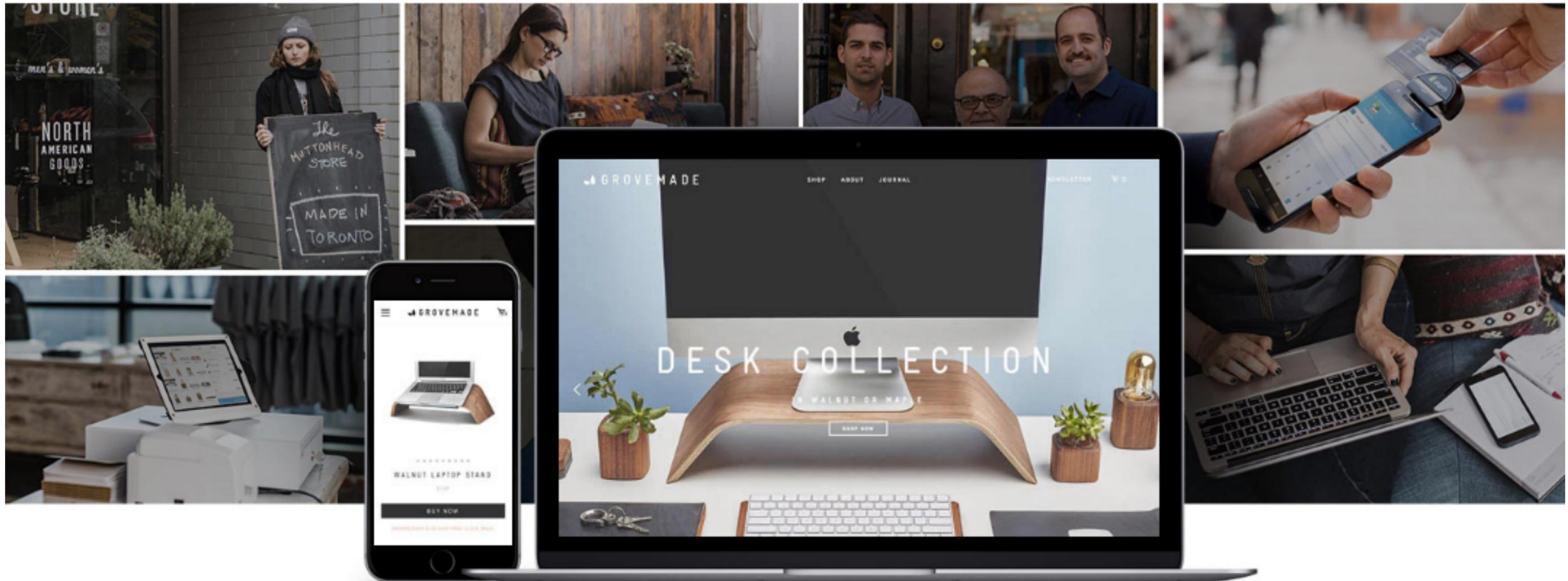


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What is user experience research?





User research “focuses on understanding user behaviours, needs, and motivations through observation techniques, task analysis, and other feedback methodologies.”







Jared M. Spool

Follow

Thank you for encouraging my behavior! Founder of @UIE. Co-Founder of @CenterCentre. Exploring...

Apr 19, 2015 · 6 min read

The Redesign of the Design Process

The user researcher's role has changed. It used to be about running studies.

Now it's about growing the team's understanding of their users.

Top highlight

We're just trying to understand **human beings**, and **why they do the things they do**.

To do this we **collect information**.

And then we spend a bunch of time trying to **make sense** of this information.

But wait... how is this different from other types of research?

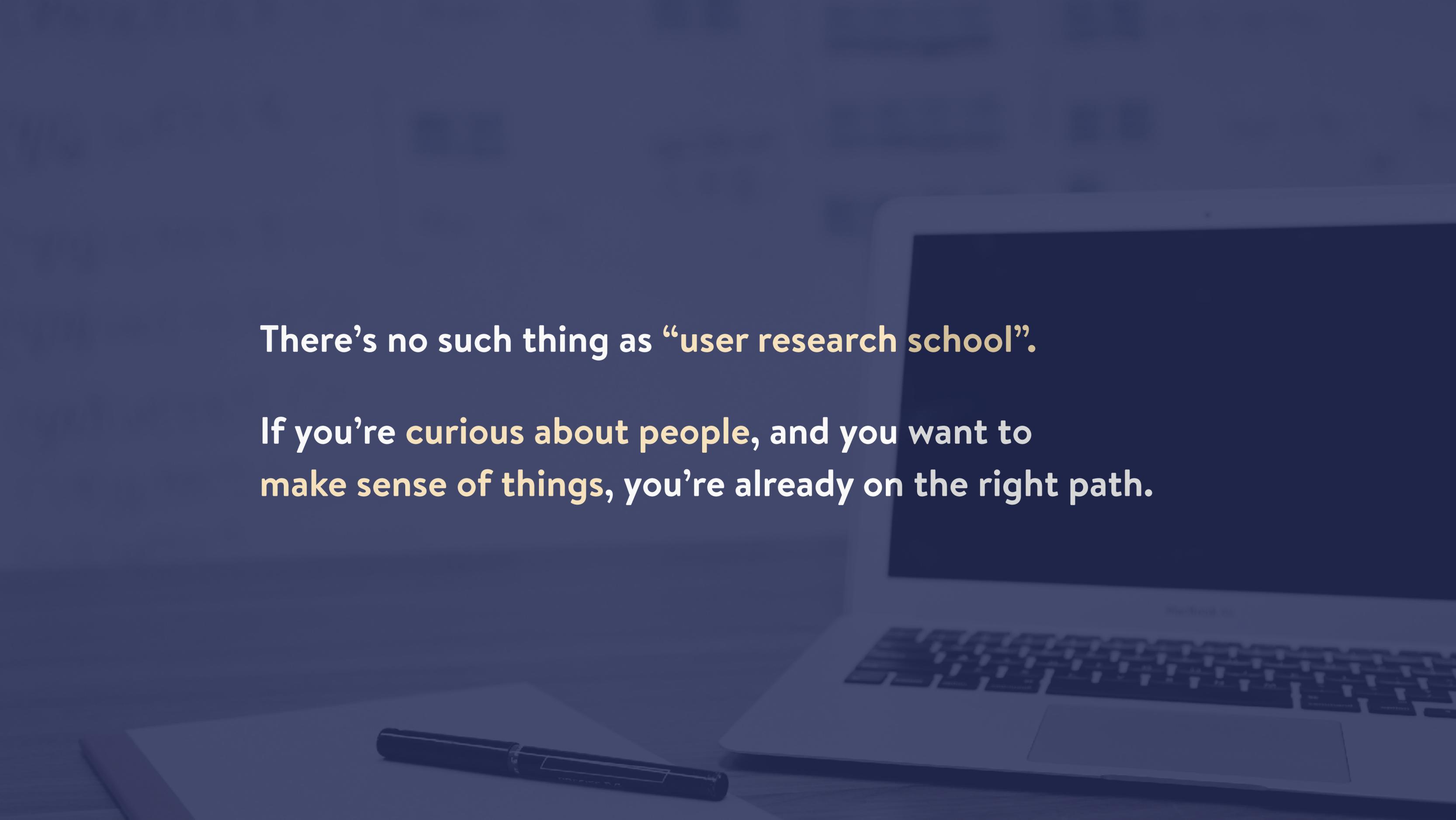
- **It typically exists within the context of a broader product or process**
- **Its goal isn't in and of itself simply to gather knowledge**
- **It's conducted with the purpose of bringing about direct improvement to a process or product**
- **It places people before the product or process**
- **It tends to occur in an iterative manner, rather than a one-off**



So **why** do we do user research?

A few reasons...

- **Because we have questions**
- **Because we want to test our assumptions**
- **Because we've noted things that require us to gather more context**
- **Because we want to build empathy**
- **Because we want to make things better**

The background is a dark blue gradient. In the lower right, there is a faint, semi-transparent image of a laptop with a keyboard and a pen resting on a surface in front of it. The text is overlaid on the left side of the image.

There's no such thing as “user research school”.

If you're curious about people, and you want to make sense of things, you're already on the right path.



So here are **five tips** to get you further along.

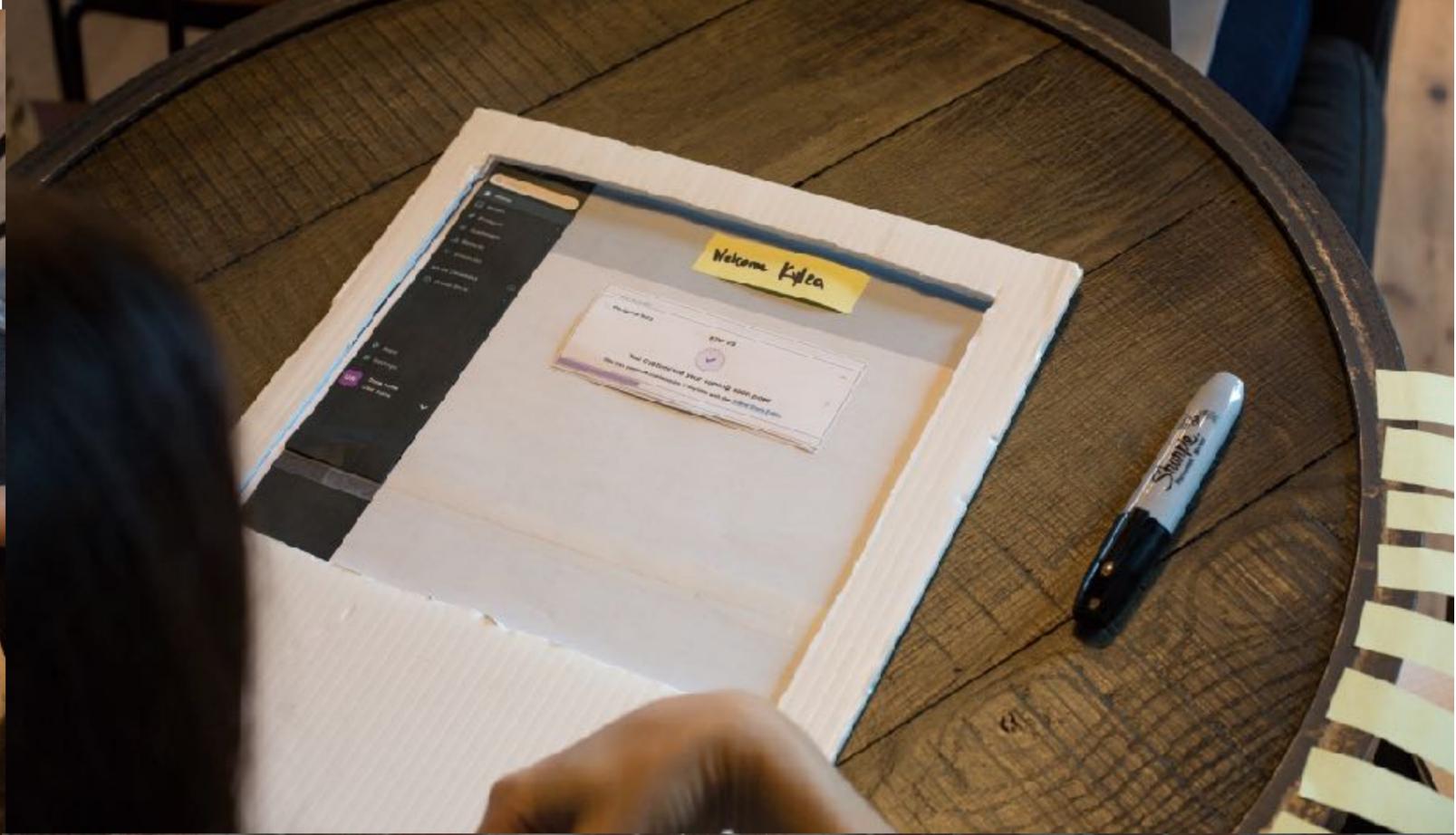
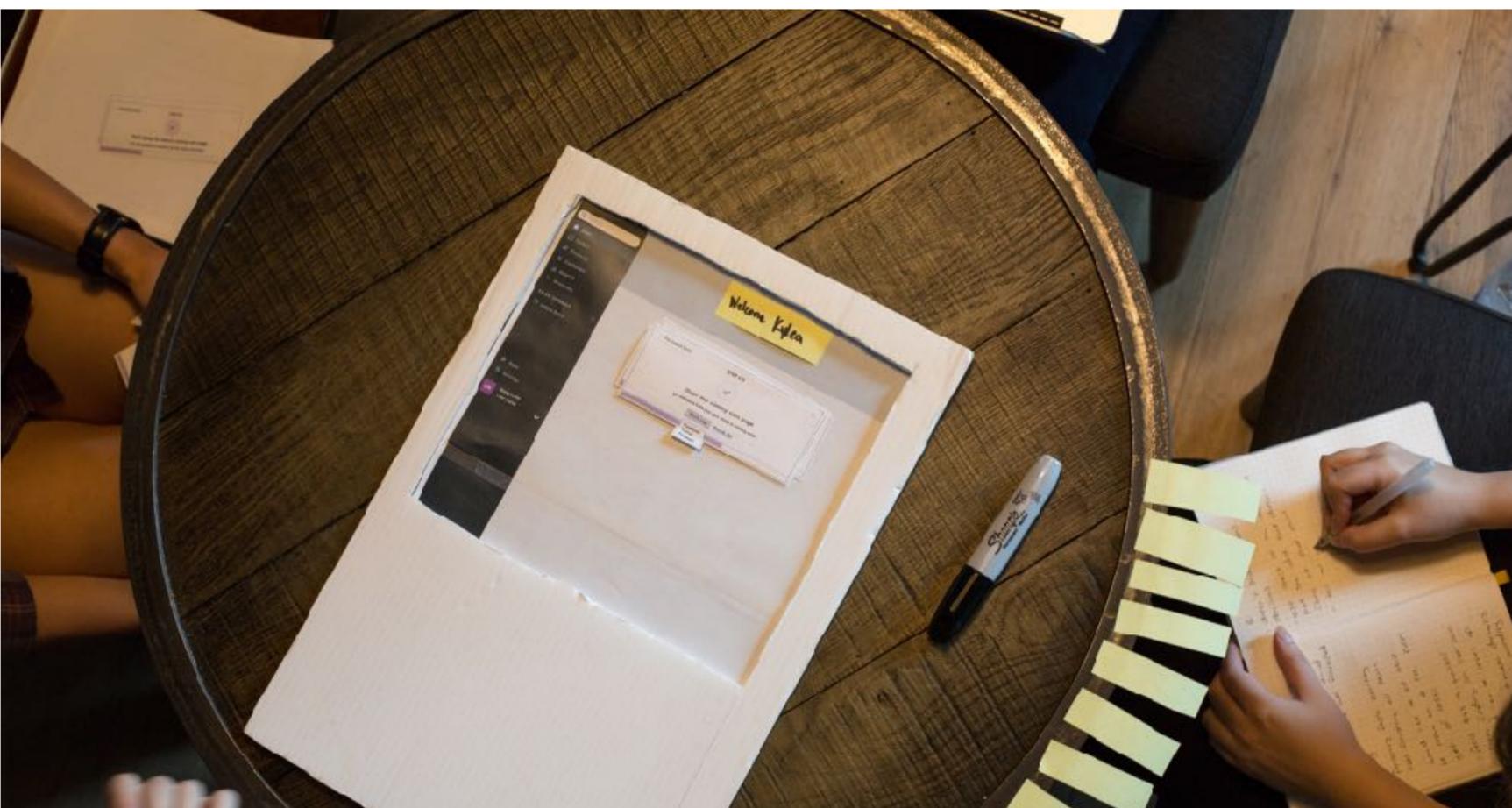


Tip #1: Find the right method for your question.



Here are a few **qualitative research** techniques.









Journal study

Elyse's Shopify Journal

Welcome back Elyse, and thanks for taking the time to fill out your journal today!

*** 1. How's your theme coming along?**

- I'm still working on it.
- It's ready to go live on my store.

Next





bicycle

ES
CES
&
JER
1920
1925

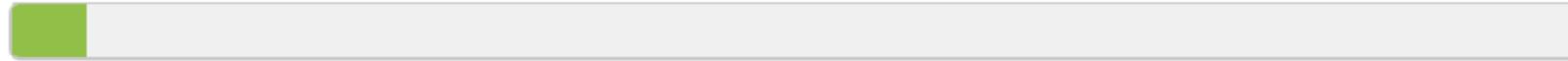
LOVA
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875 292
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VIZI
EDEL



And here are a few ways we might also gather **quantitative data**.



This is your chance to directly influence the upgrades we'll make to Shopify over this year. The more we understand what's important to you, the better we can develop solutions to help you make sales and grow your business.

This survey will only take about 10 minutes.

Complete the survey by Monday, January 16th for your chance to win a \$1,000 pre-paid Visa card.

*** 1. How would you describe yourself?** 

- Shopify store owner
- Working for a Shopify store owner
- Shopify partner or expert
- Previously owned a Shopify store
- Did the free trial but never launched my store

Next



Search reports & help

All Users
100.00% Sessions

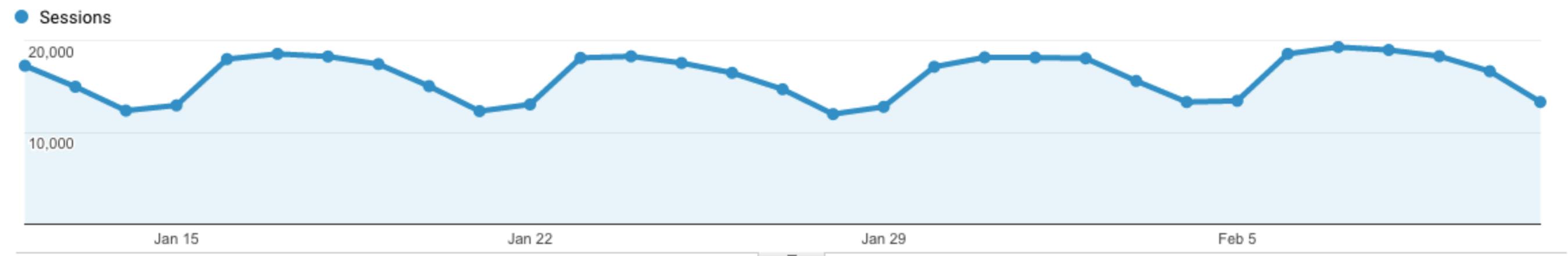
+ Add Segment

- Dashboards
- Shortcuts
- Intelligence Events
- Real-Time
- Audience

Overview

Sessions vs. Select a metric

Hourly Day Week Month



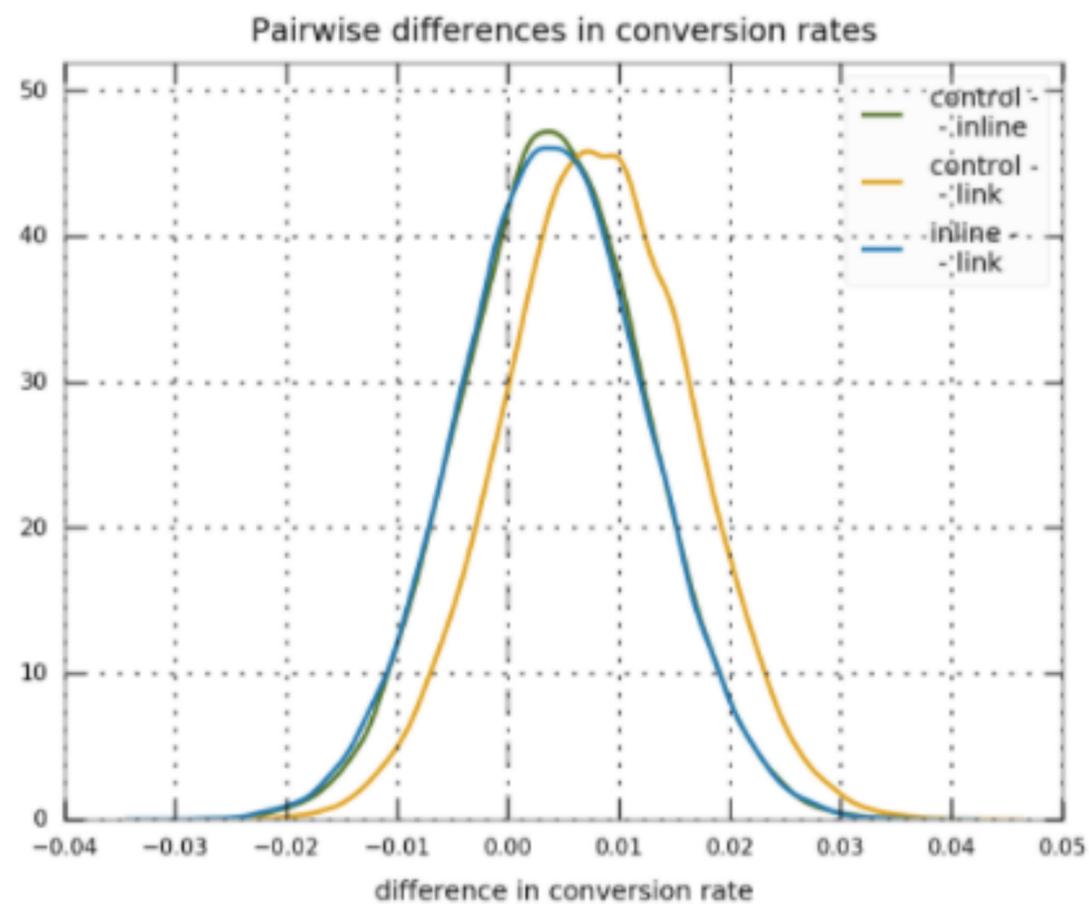
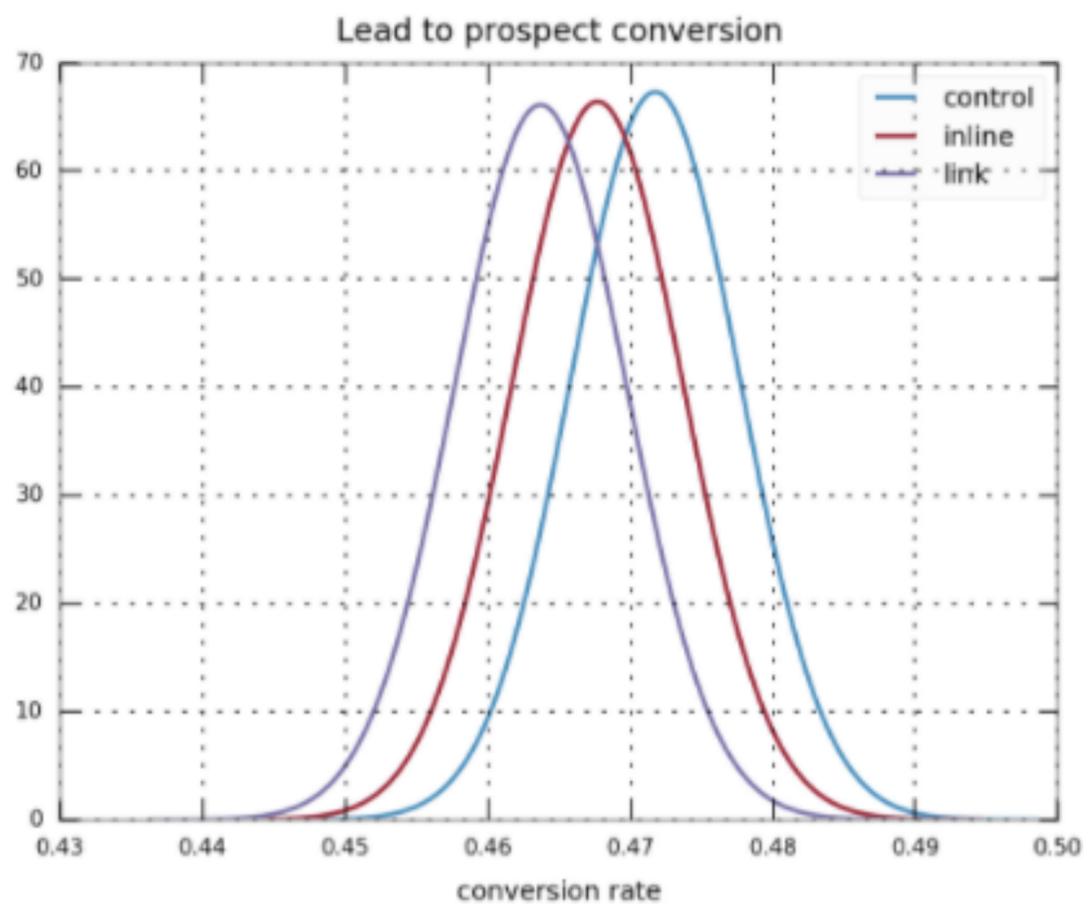
- Overview
- Active Users
- Cohort Analysis **BETA**
- User Explorer
 - Demographics
 - Interests
 - Geo
 - Behavior

Sessions 498,621	Users 255,457	Pageviews 3,147,725	Pages / Session 6.31
Avg. Session Duration 00:04:40	Bounce Rate 30.86%	% New Sessions 42.16%	



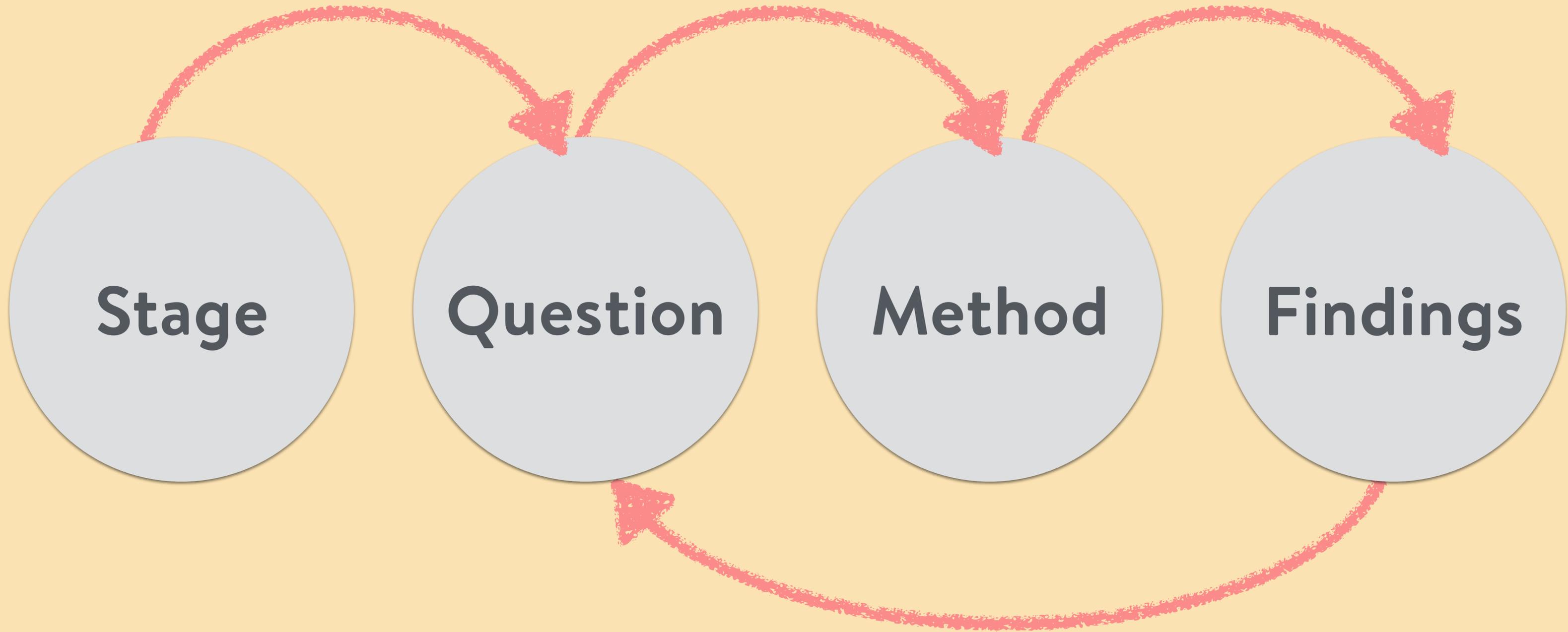
Comparison	Confidence	Rel. Increase
control converts higher than inline	69%	--
control converts higher than link	83%	--
inline converts higher than link	68%	--

Group	Conversion	Total	Observed rate
control	3,347	7,095	47.17%
inline	3,227	6,900	46.77%
link	3,167	6,830	46.37%

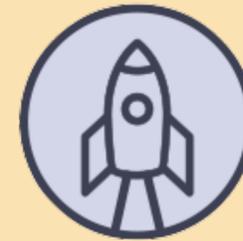




So how do we choose
the **right technique?**



Getting shit done



Getting shit done



Idea

Gather initial thoughts on problem and impact of solving it



Think

Become experts of the problem domain, both internally and externally



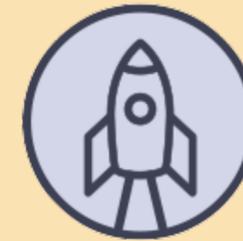
Explore

Plan how the problem will be solved, explore and evaluate various solutions



Build

Iteratively build and ship small, quality components of the solution



Launch

Publicly release the solution to users



Tweak

Iterate on the solution based on user feedback and usage

Getting shit done

Questions:

- What potential problems might we solve?
- How might we gather context on the problem?



Idea



Qualitative:

- Looking at existing research (internal and external)
- Interviews, observations, surveys, diary studies to establish baseline of current problem
- Team kickoff workshop

Quantitative:

- Mining existing data for potential hypotheses or insights
- Establishing facts, confirming/disproving assumptions

Getting shit done

Questions:

- What are the root problems?
- What are the biggest challenges we might focus on?



Think

Qualitative:

- Profiles/segments/personas to identify who might be impacted by the project
- More interviews and observations
- Workshops with users to further dive into the problem space
- Team workshops to explore and scope down the problems to be addressed



Quantitative:

- Quantify how big are the segments that would benefit from this product

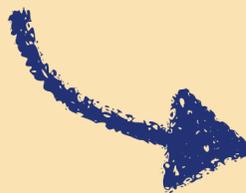
Getting shit done

Questions:

- How might we be resourceful and effective when testing assumptions and hypotheses?



Explore



Qualitative:

- Lo-fi/paper prototype testing

Quantitative:

- Define success metrics and measure baselines

Getting shit done

Questions:

- Can people use what we're building?
- Is what we're building addressing the initial problems and goals?



Build

Qualitative:

- Usability tests
- Diary studies, beta testing

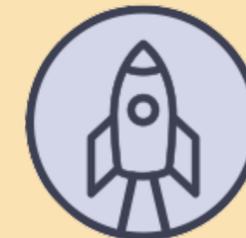
Quantitative:

- A/B tests, instrumentation, start building out reports

Getting shit done

Questions:

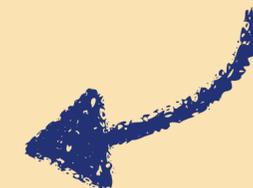
- Are people using it in the way we thought they would?
- Did we successfully solve the problem we identified?



Launch

Qualitative:

- Forums/social media monitoring
- In-context feedback forms



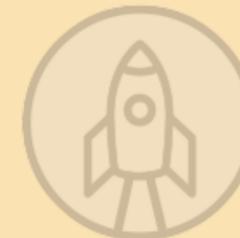
Quantitative:

- Populate reports, monitor success metrics

Getting shit done

Questions:

- What incremental improvements might be worthwhile?
- What revisions should we make to our roadmap?



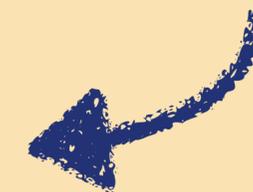
Tweak

Qualitative:

- Retrospectives, post-mortem
- Analysis of support tickets

Quantitative:

- A/B tests
- Monitor reports



How questions change over time

Are we building
the right thing?

Are we building
the thing right?



Inception



Completion



Tip #2: Look for information all around you.

Research comes in many forms.

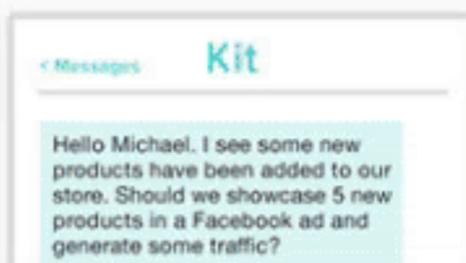
**There's primary research... and then
there's all the other information at our fingertips.**

Discussion Forums

I'm looking for...



[Home](#) > [Discussion Forums](#) > [Ecommerce Marketing](#) > [Discount code - Limit to 1 time per customer](#)



Kit

Hello Michael. I see some new products have been added to our store. Should we showcase 5 new products in a Facebook ad and generate some traffic?

Stop trying to do it all alone. Add Kit to market your store

[Learn more](#)

 TOPIC



Jane
Member

Posts: 36

Discount code - Limit to 1 time per customer

September 20, 2013

 25

This post is outdated

Hi,

I want to limit this particular discount for 1 time use per customer. Can this be done?

Top

Latest

Accounts

Photos

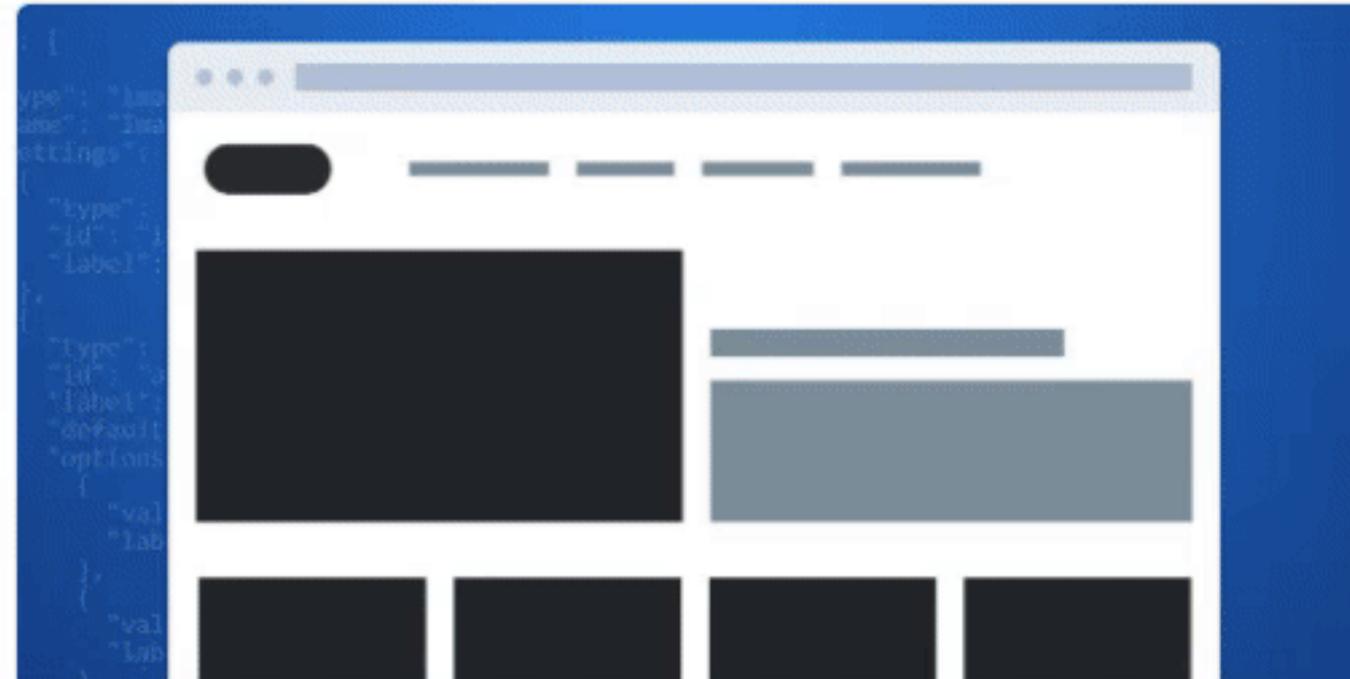
Videos

More options ▾



Shopify Partners  @ShopifyPartners · 23h

We're happy to introduce a new feature that will make **Shopify** Themes more customizable than ever before: **sections** 🙌



Introducing Sections for Shopify Themes – Shopify

At Shopify, we're always looking for ways to make the lives of our merchants and partners easier. In our mission to make that a reality, we'r...

shopify.com



1



13



Kelly Vaughn @mrskellyvaughn · Oct 28

Launched a [@Shopify](#) site using new **Sections** functionality. Client says **Sections** makes updating his site much easier. smmagnetics.com



Michael Brand



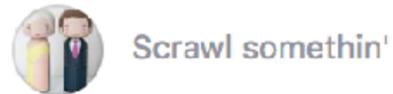
The #1 Shopify Seller Community

in collaboration with



Boarded | Hail-shots | Blabber t' yer mates | More

Scrawl Message | Portrait/Bewit... | Current Bewit...
Moarr...



Portrait/Bewit... | Mark Ye Mat... | Ask for Reco... | ...

Announcements [See All \(12\)](#)



First-timers, welcome!
We are happy to have you here! This is a community of Shopify Entrepreneurs from every part of the world, where top/most active members are dedicated to building life-changing businesses.
Our goal here is to share knowledge around growing eCommerce businesses through our collective experiences. ...(tharr be more)
Peer into the depths

GROUP BY

Storetasker - Shopify Experts
36,663 like this
Use a contraption on yer pocket

UNITS [Go to Units](#)

0 of 1 required unit completed

Units are a way for group admins to share knowledge and resources with you.

INVITE MEMBERS

+ e-bottle

CREWMATES **99,045** Crewmates



SUGGESTED MEMBERS [Hide](#)





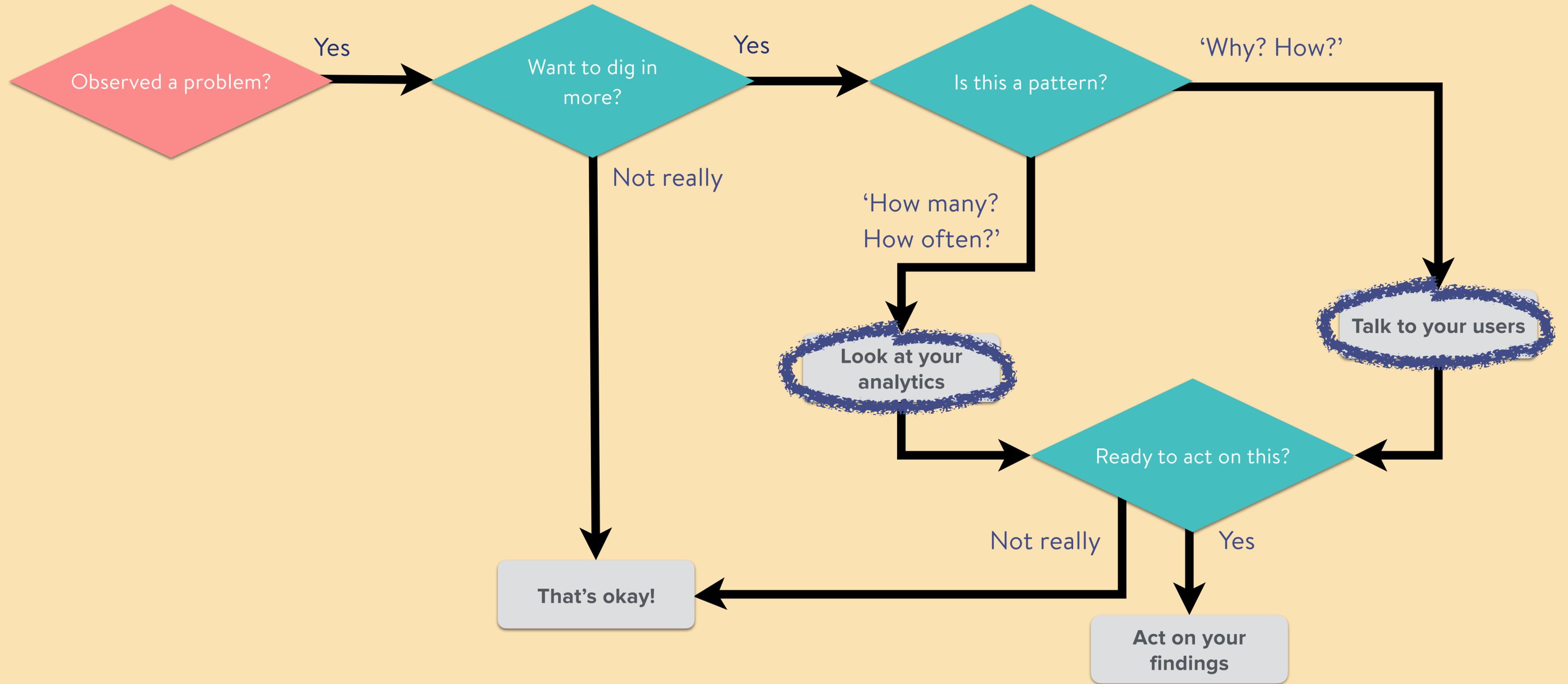
Tip #3: Pause before taking action



A vintage typewriter is the central focus, sitting on a light-colored wooden desk. A white sheet of paper is inserted into the carriage. To the left of the typewriter, a white ceramic coffee cup is visible. The entire scene is overlaid with a semi-transparent blue filter. The text is positioned on the right side of the image.

“Now there is a **constant tweaking** of formats and systems. For the ‘creatives’ who work behind the scenes this might seem easy and inconsequential... but for process workers at the other end of the system it is just **bloody annoying**. It’s as though every week or two when you opened your desktop on your computer the icons had been changed, and subtly re-arranged.”

- A disoriented-and-somewhat-mad merchant, Shopify

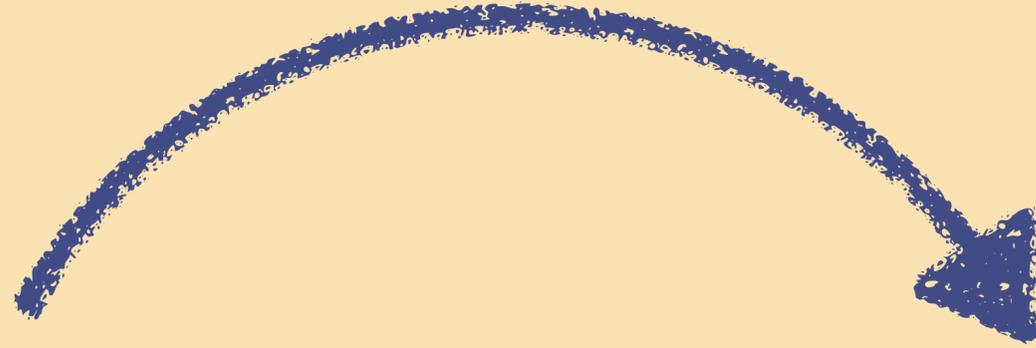




Tip #4: Triangulate your sources.



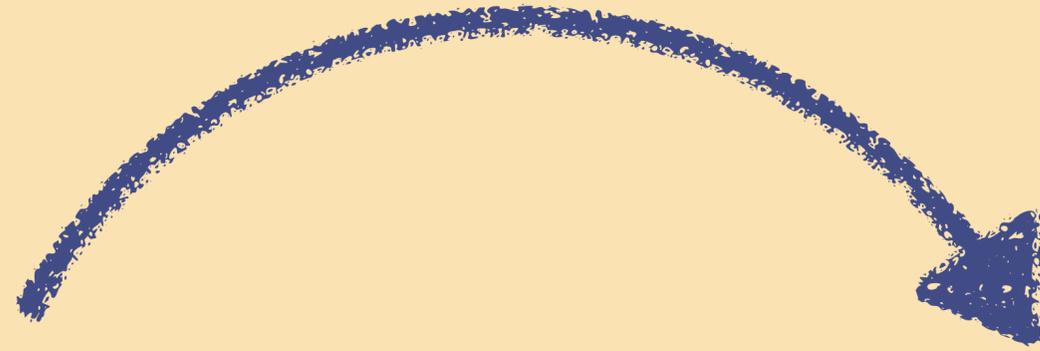
Look for patterns



Understand the story



Understand the story



Confirm the pattern

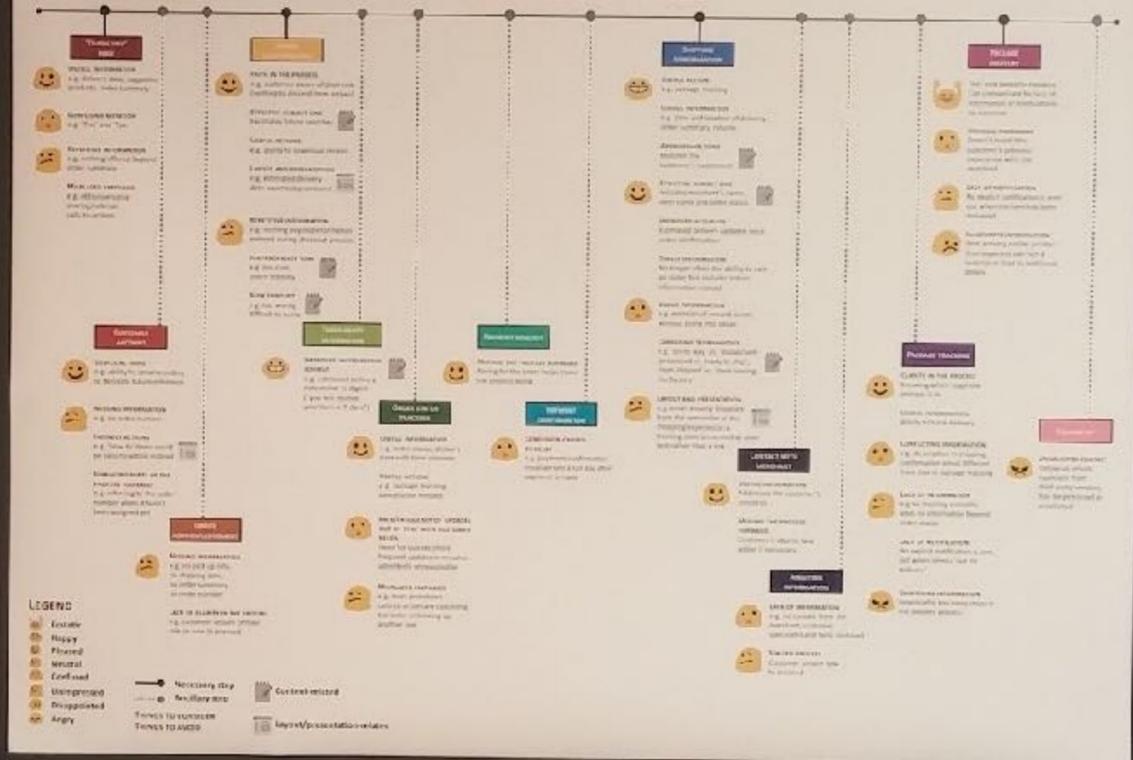


Tip #5: Get your audience's attention.





ORDER STATUS RESEARCH ACTIVITY CUSTOMER JOURNEY



Shopify Mobile wish list
“Check pending
balance,
view dropped carts,
engagement
overview.”

Shopify Mobile survey

WF
“

Why “mobile first”?
“I can have it with me
in the storage room or
wherever I am to
prepare orders.”

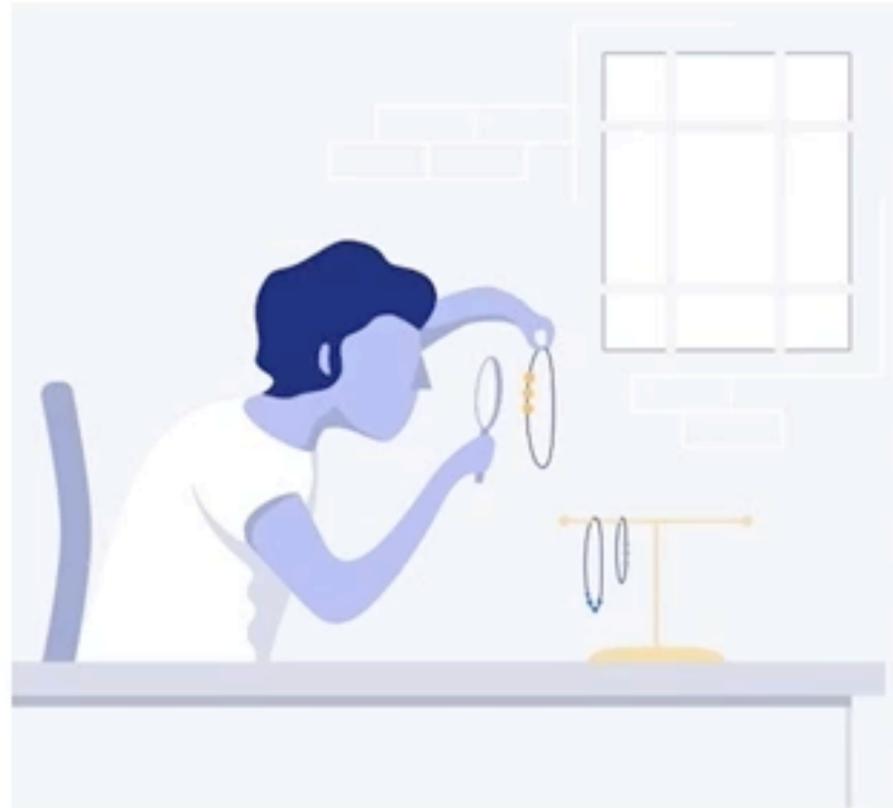
Shopify Mobile survey

“Mobile first” facts
It’s fractured the
consumer journey
into hundreds of
real-time,
intent-driven
micro-moments.

Find out more:
goo.gl/U5HP32



Zel's store-y



One of Zel's friends thinks the charms are so unique, they might want to consider [selling them](#) .

Next



Tip #1: Find the right method for your question.

Tip #2: Look for information all around you.

Tip #3: Pause before taking action.

Tip #4: Triangulate your sources.

Tip #5: Get your audience's attention.

Doing research isn't just about running studies
and writing reports.

It's about adopting a mindset of
asking questions,
finding answers,
sharing knowledge,
and encouraging empathy.





Thank you!
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