# What's the deal with user research anyway?

The challenges of designing for people

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UX Research Lead // Shopify



shopify

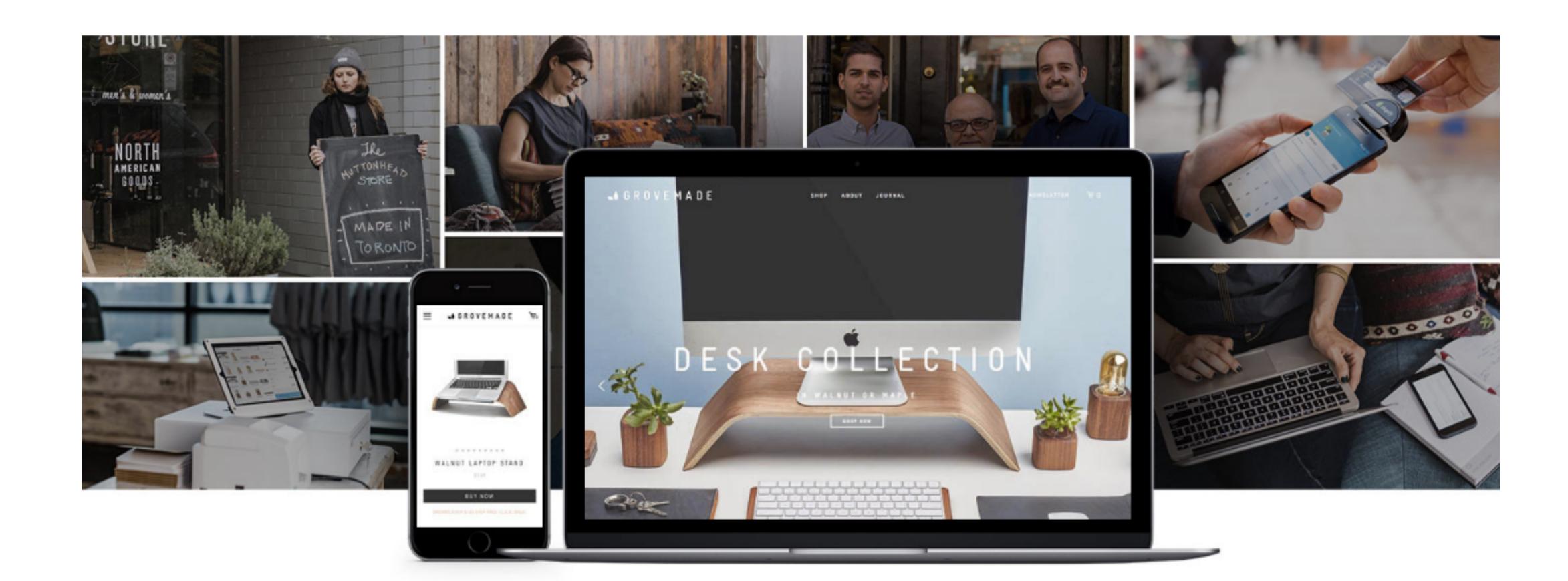
### An ecommerce platform made for you

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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.

Top highlight

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

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

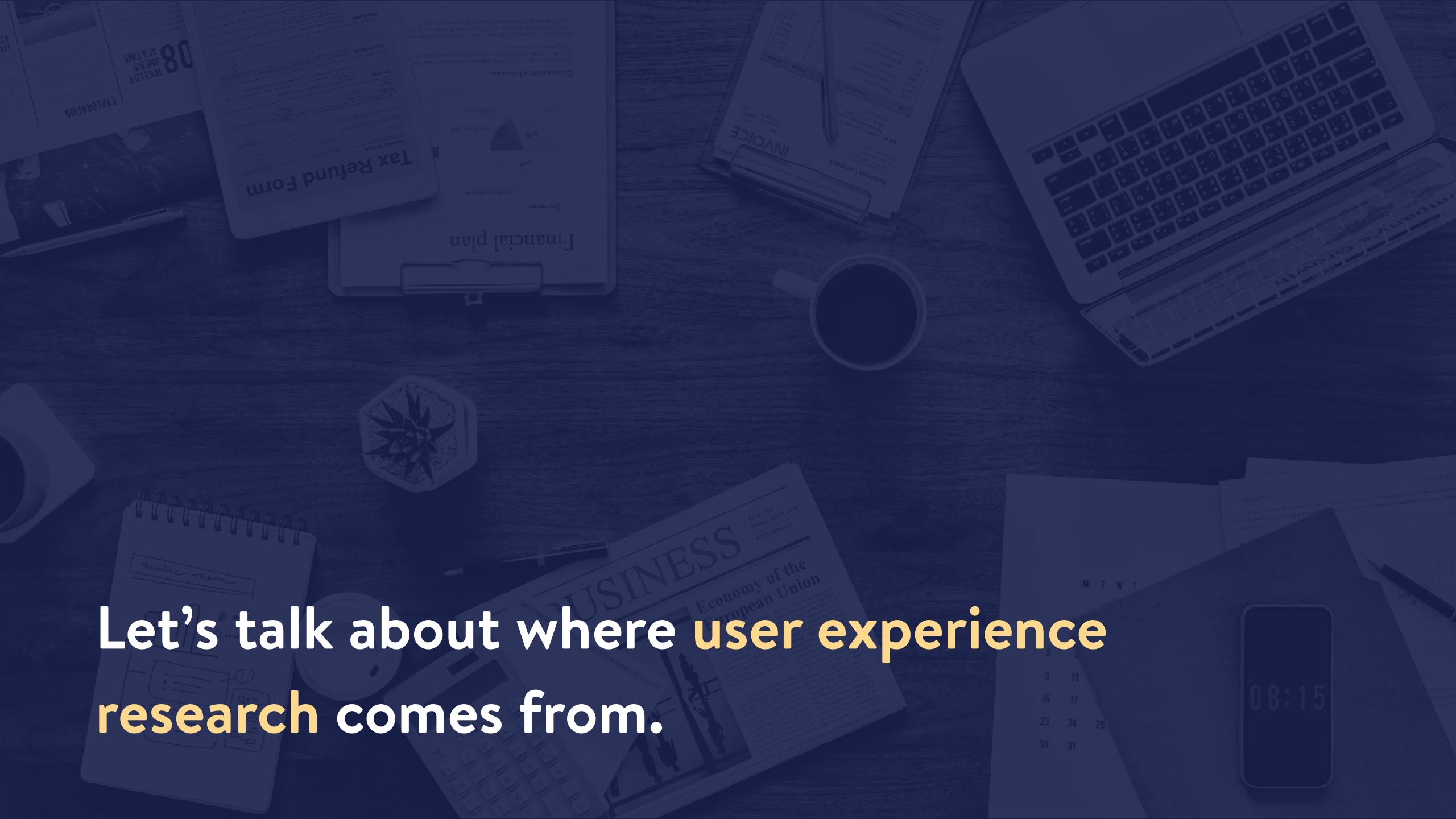


### A few reasons...

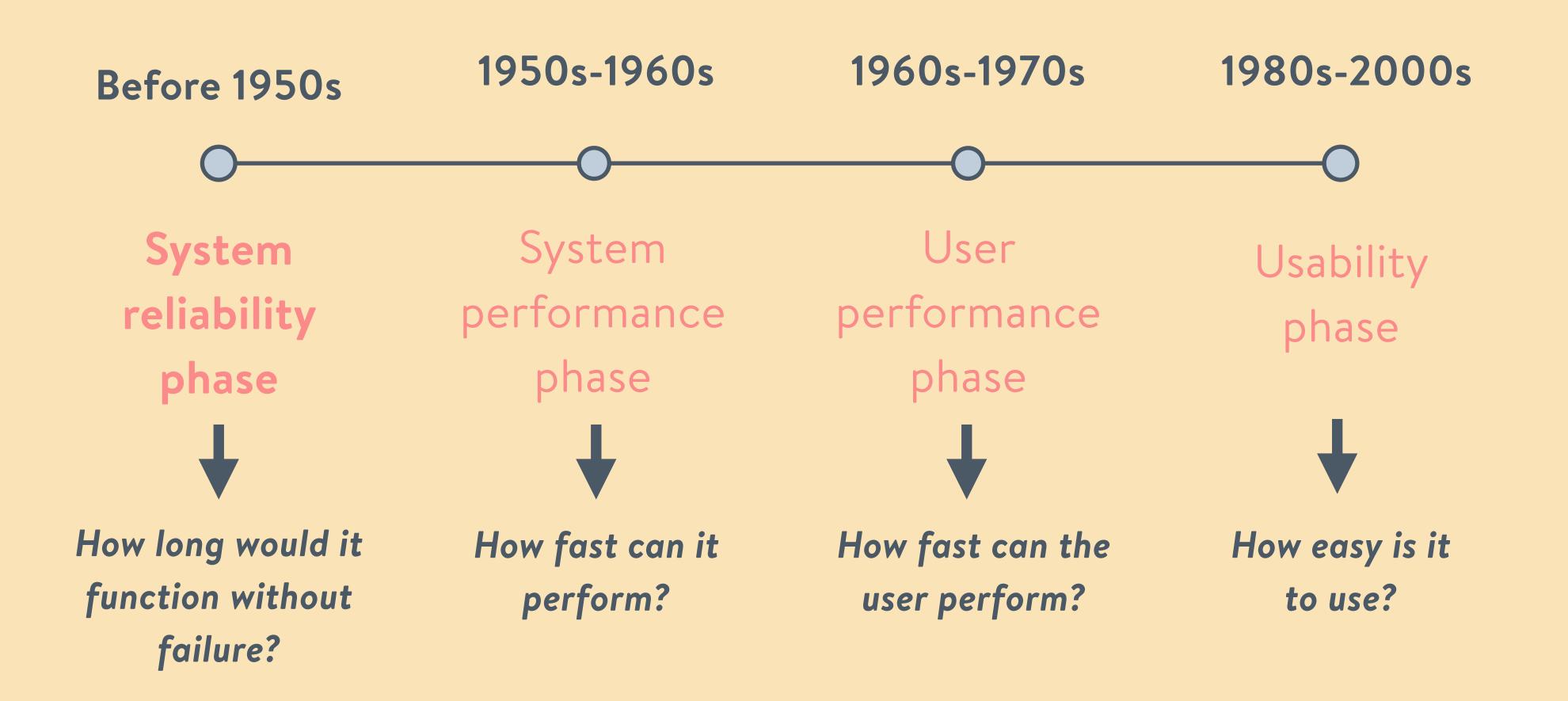
- Because we have questions
- Because we want to test our assumptions
- Because we've noted things that require us to gather more context
- Because we want to build empathy
- Because we want to make things better

There's no such thing as "user research school".

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



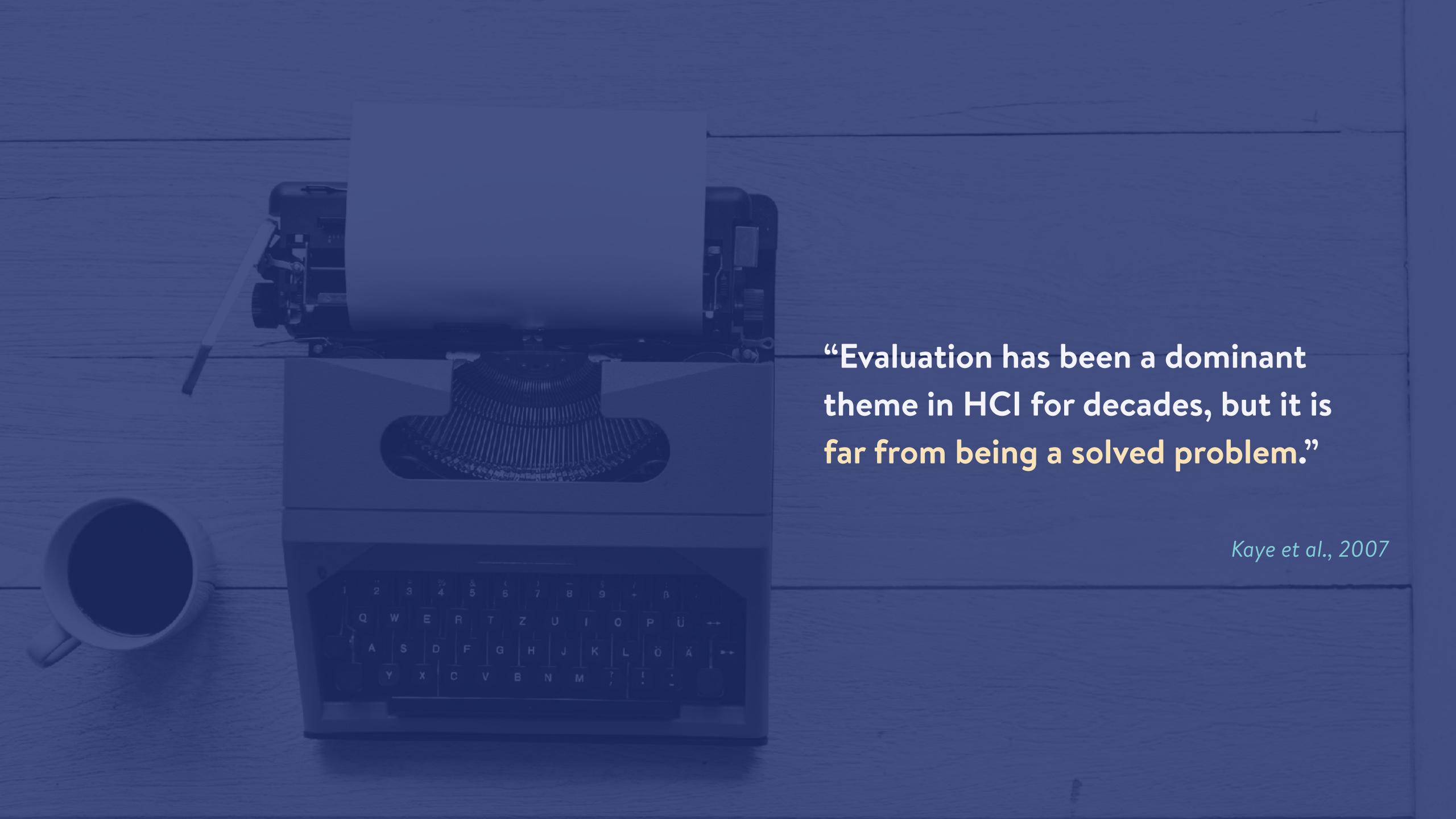
## A brief historical overview of user research...



# How do we evaluate usability?

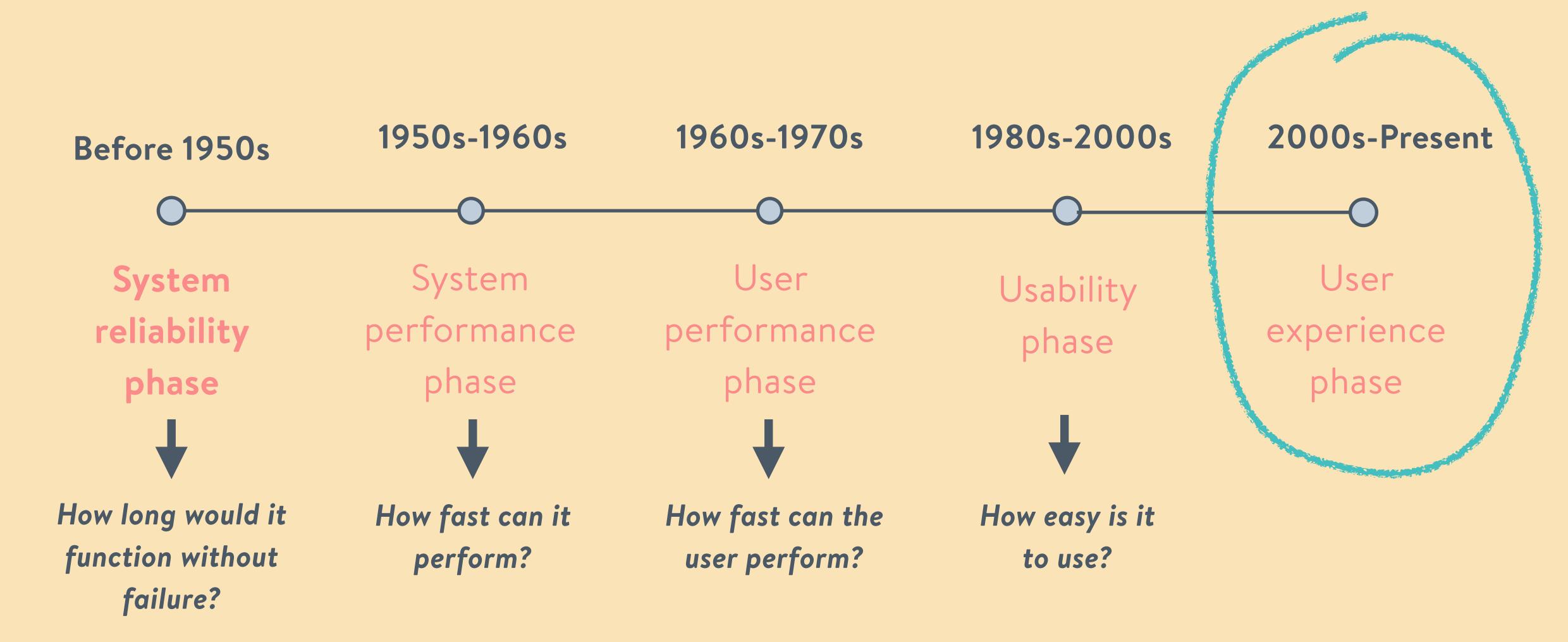
Give your target users a series of repeatable tasks, then measure:

- Time to complete
- Task completion rate
- Accuracy
- Error rate
- Satisfaction





# A brief historical overview of user research...



# The 'user experience' era

- Personal, social, cloud, mobile computing
- Contexts are broader
- Technology is more pervasive
- Shift from the utilitarian/pragmatic to the emotional/affective

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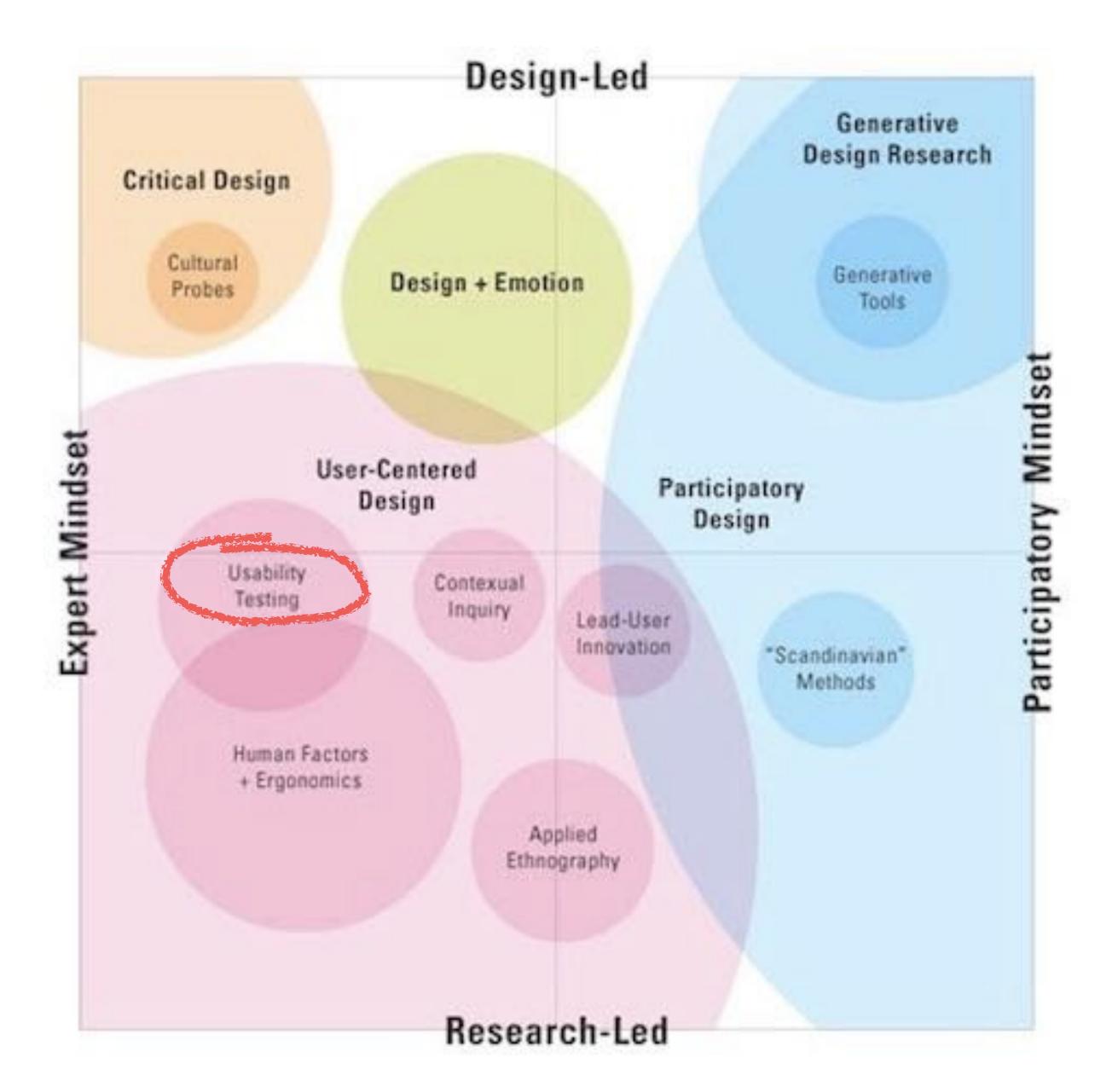
# Question #1

What are some examples of interfaces where evaluating tasks might be more important? What about ones where evaluating experiences might be more important?









http://uxmag.com/sites/default/files/uploads/anderson-richard/sandersdiagram.jpg







### 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.









### **Shopify Survey 2017**

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.

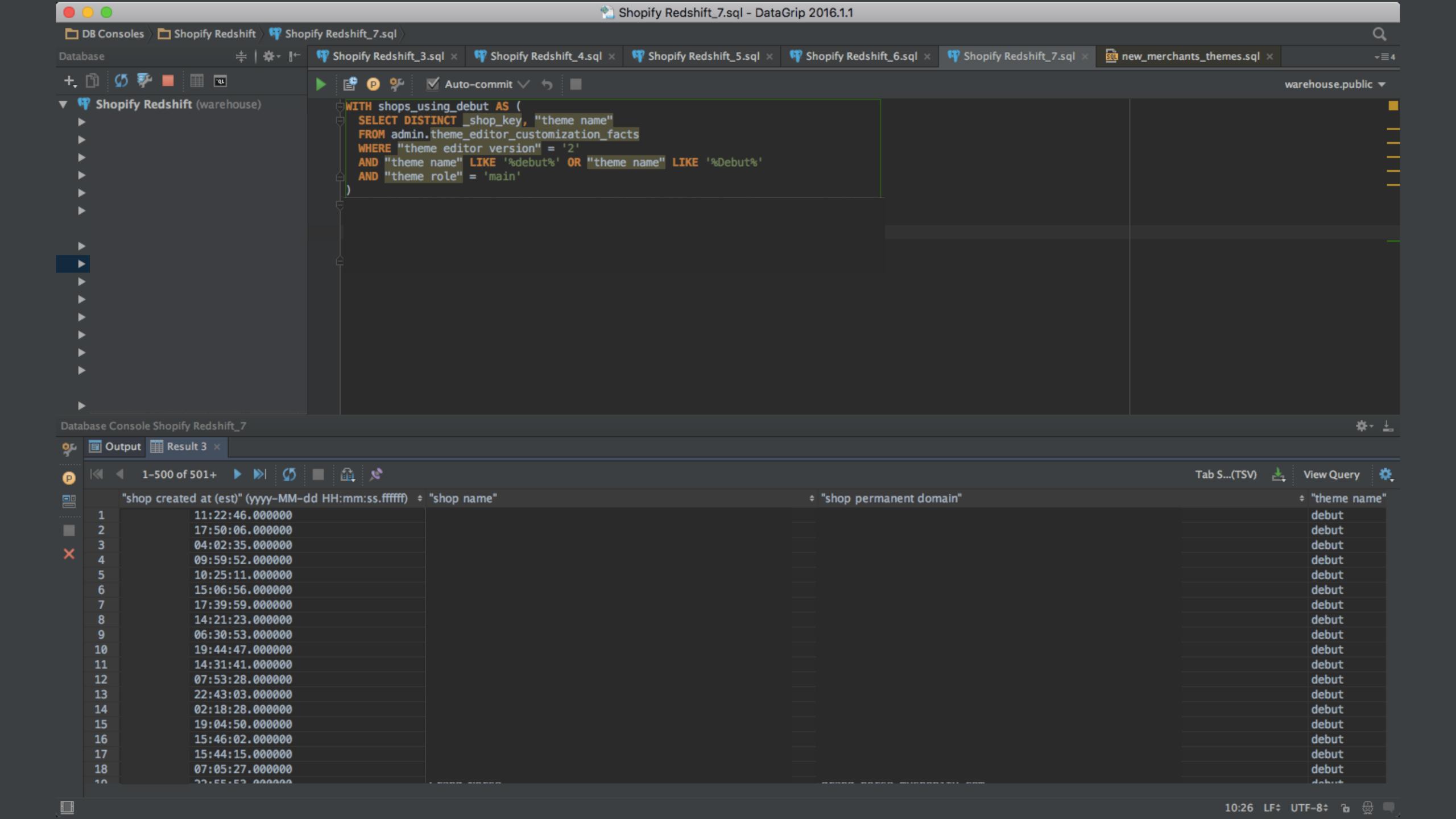
This survey will only take about 10 minutes.

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?

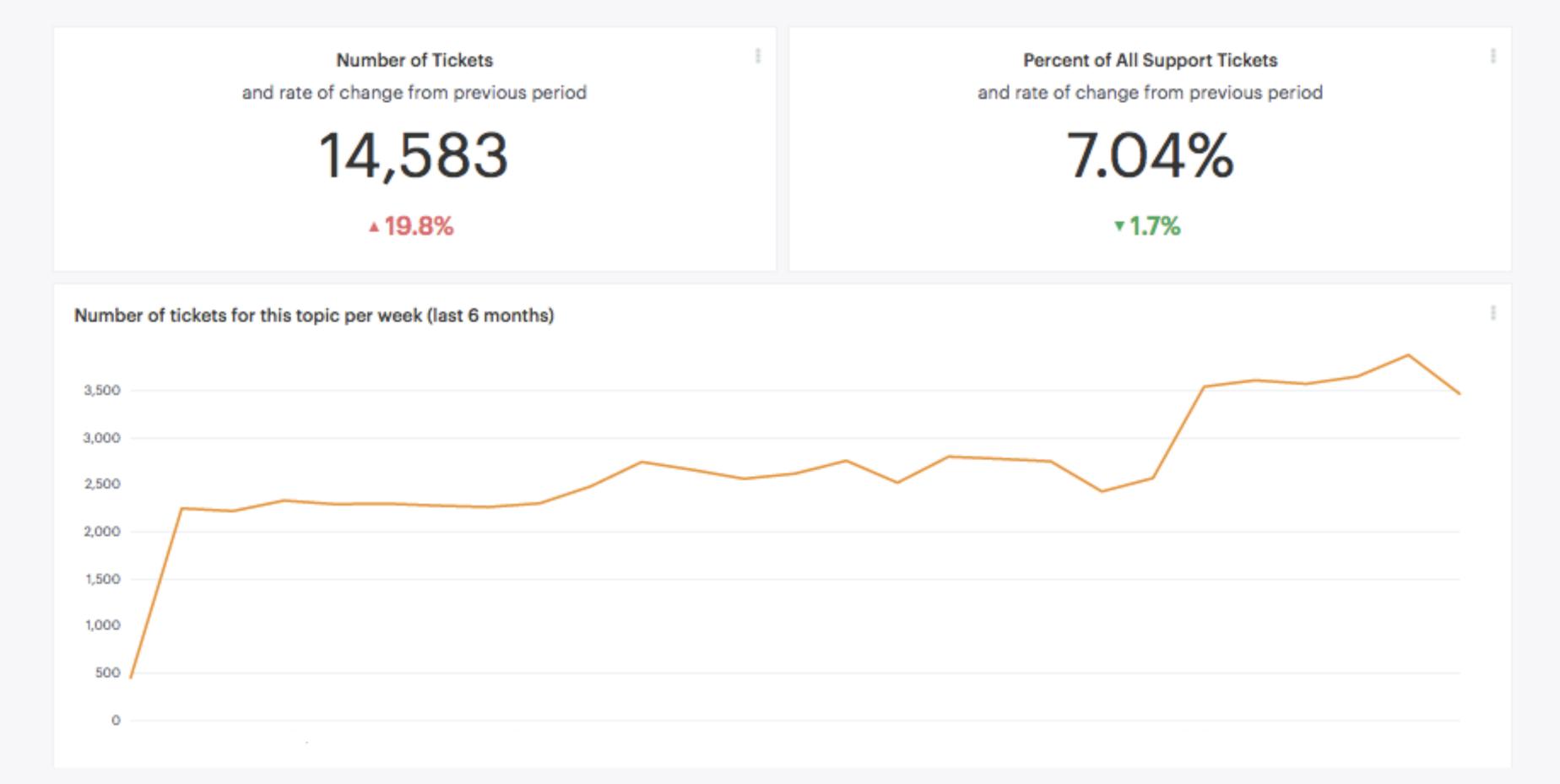


- Shopify store owner
- Working for a Shopify store owner
- Shopify partner or expert
- Previously owned a Shopify store
- Did the free trial but never launched my store



#### **Support Tickets Analysis**

Number of support tickets for a chosen topic and period, with comparisons to an equal previous period, normalization by total number of customers, and as percentage of total support tickets.

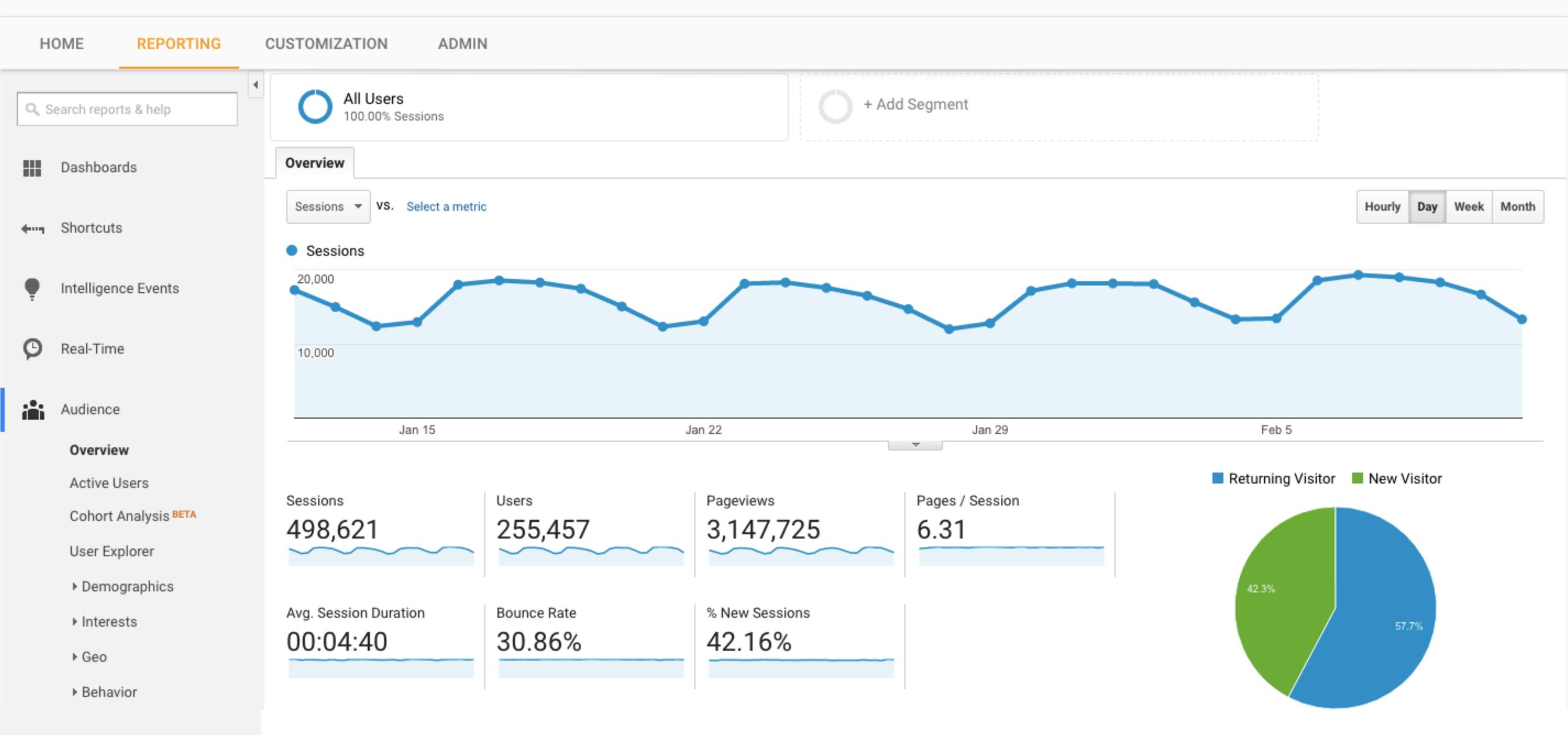






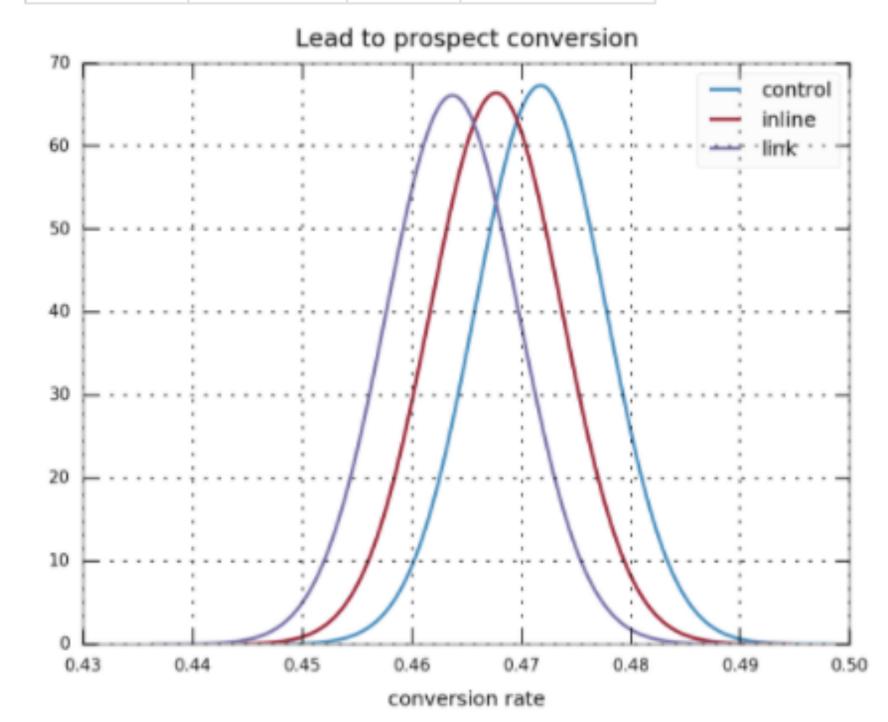


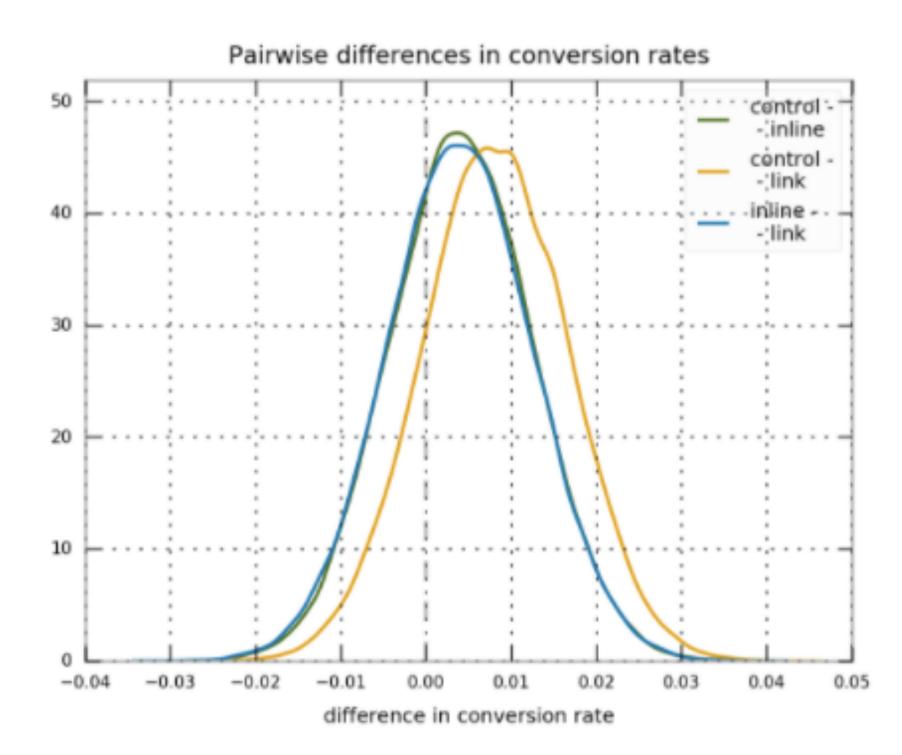




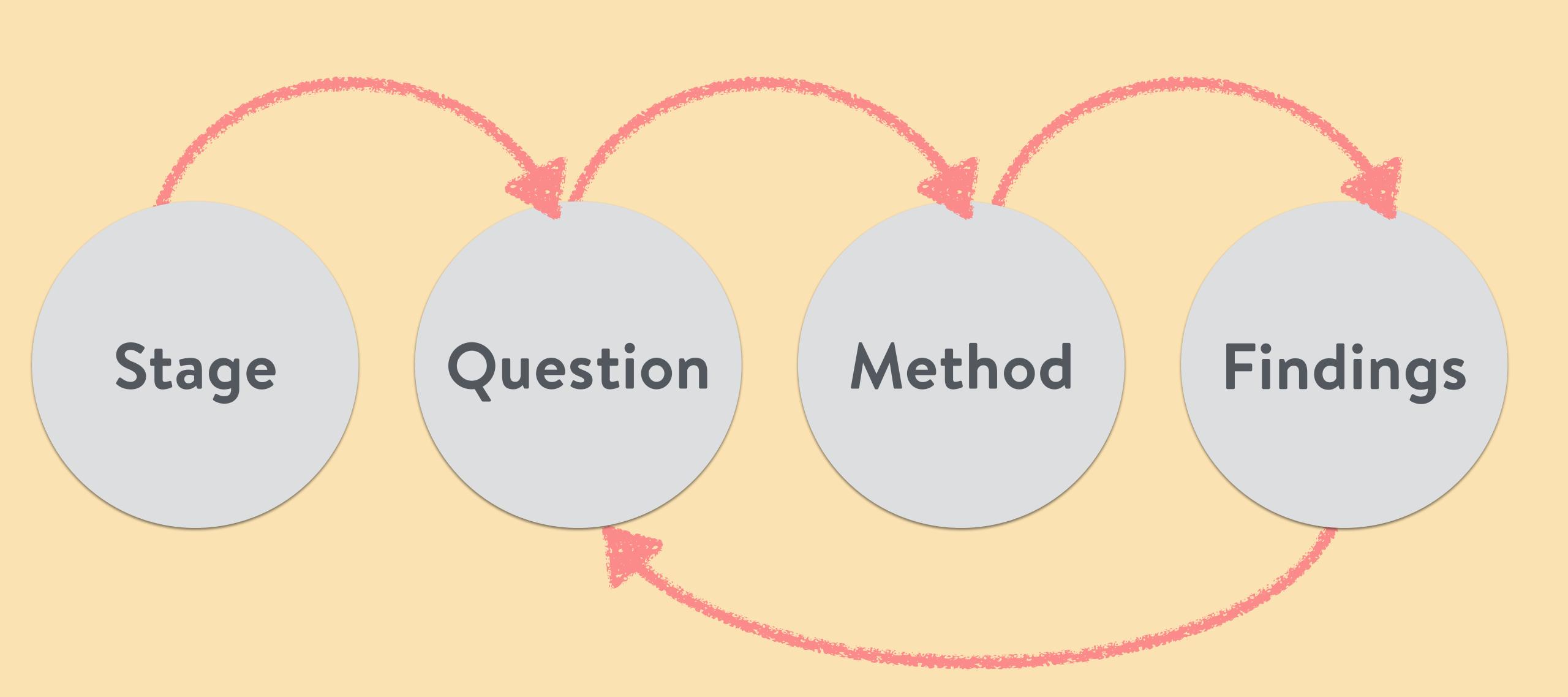
Comparison	Confidence	Rel. Increase
control converts higher than inline	69%	
control converts higher than link	83%	
inline converts higher than link	68%	

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%









### Question #2

When do quantitative data and qualitative UX research best complement each other?

- a) During the early stages of a project
- b) During the later stages of project
- c) Both















### Idea

Gather initial thoughts on problem and impact of solving it



### Think

Become experts of the problem domain, both internally and externally



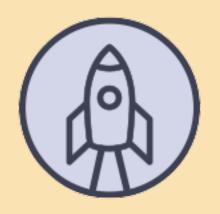
### Explore

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

lterate on the solution based on user feedback and usage

#### Questions:

















### 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

#### **Questions:**



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







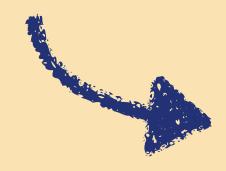






### Think

#### Qualitative:

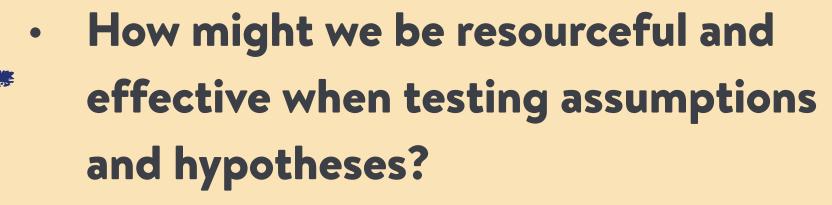


- · Profiles/segments/personas to identify who might be impacted by the project
- More interviews and observations
- Workshops with users to further dive into the problem space
- Team workshops to explore and scope down the problems to be addressed

#### Quantitative:

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

#### Questions:







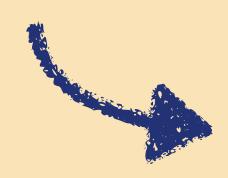








Explore



#### Qualitative:

Lo-fi prototype/clickable mockup testing

#### Quantitative:

Define success metrics and measure baselines

#### **Questions:**

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













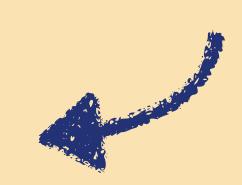
Build

#### Qualitative:

- High-fidelity usability tests
- Diary studies, beta testing

#### Quantitative:

 A/B tests, instrumentation, start building out reports



#### **Questions:**

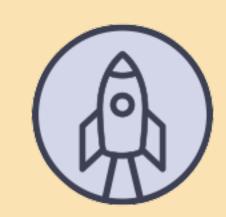
- · Are people using it in the way we thought they would?
- · Did we successfully solve the problem we identified?













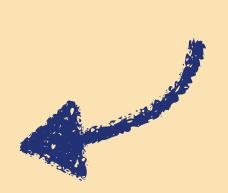
Launch

#### Qualitative:

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

#### Quantitative:

Populate reports, monitor success metrics



#### Questions:

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













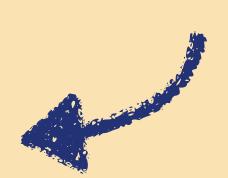
#### Qualitative:

- Retrospectives, post-mortem
- Analysis of support tickets
- Triangulate previous insights with quantitative data

#### Quantitative:

- A/B tests
- Monitor reports

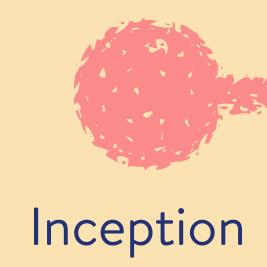


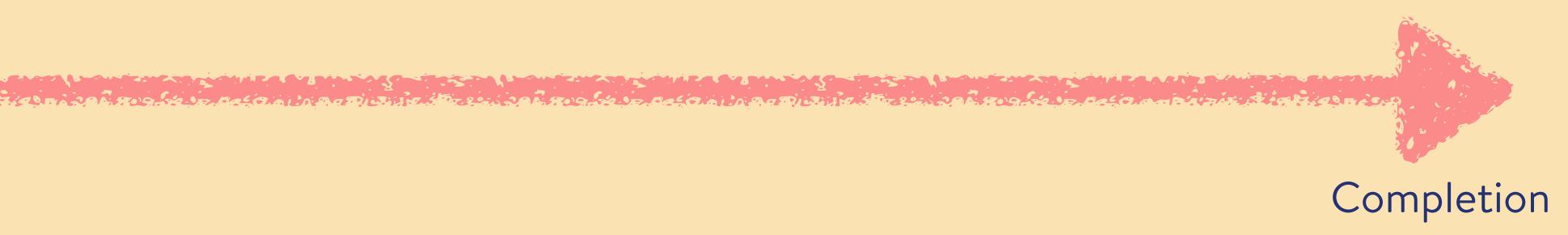


### How questions change over time

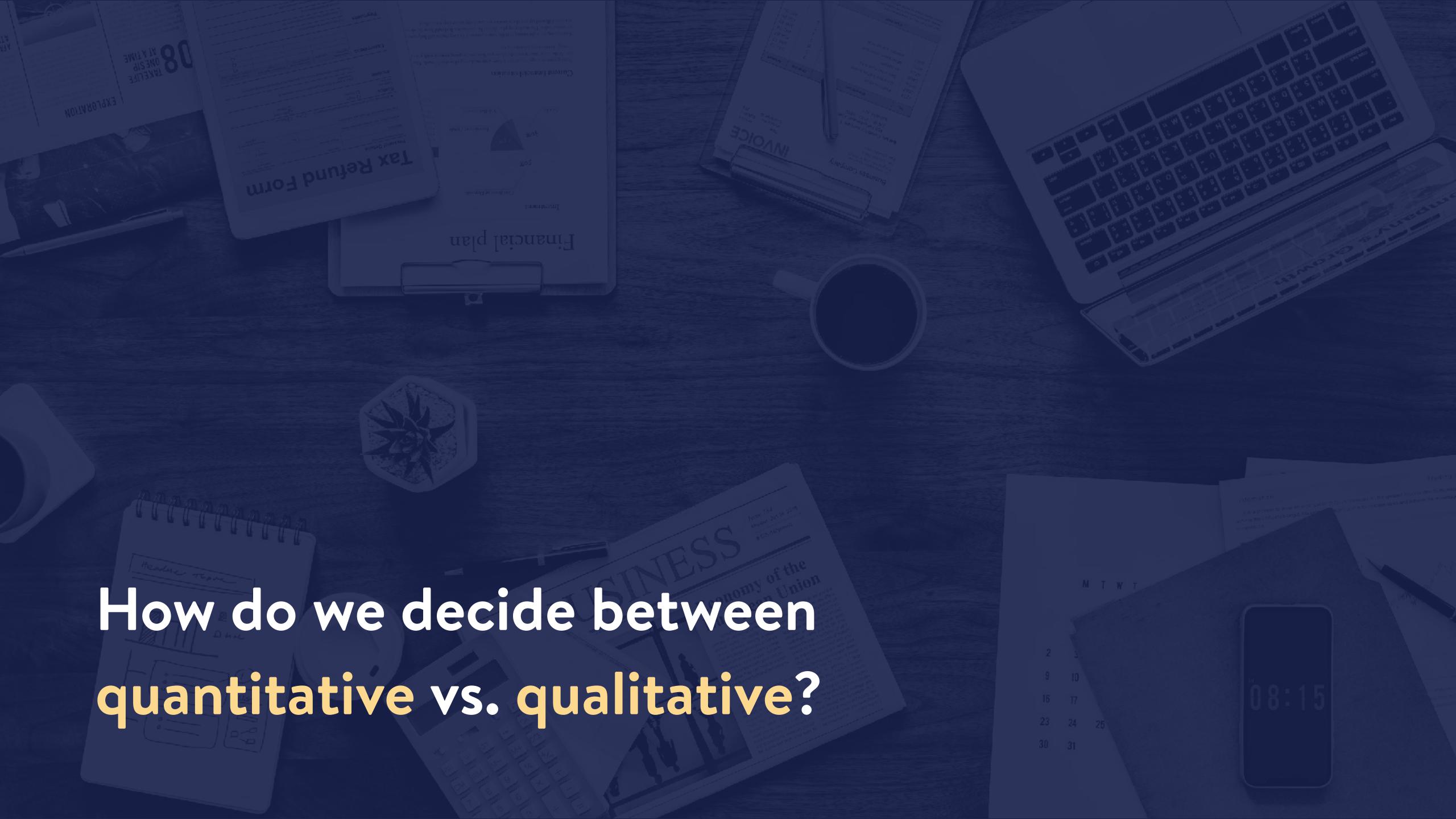
Are we building the right thing?

Are we building the thing right?



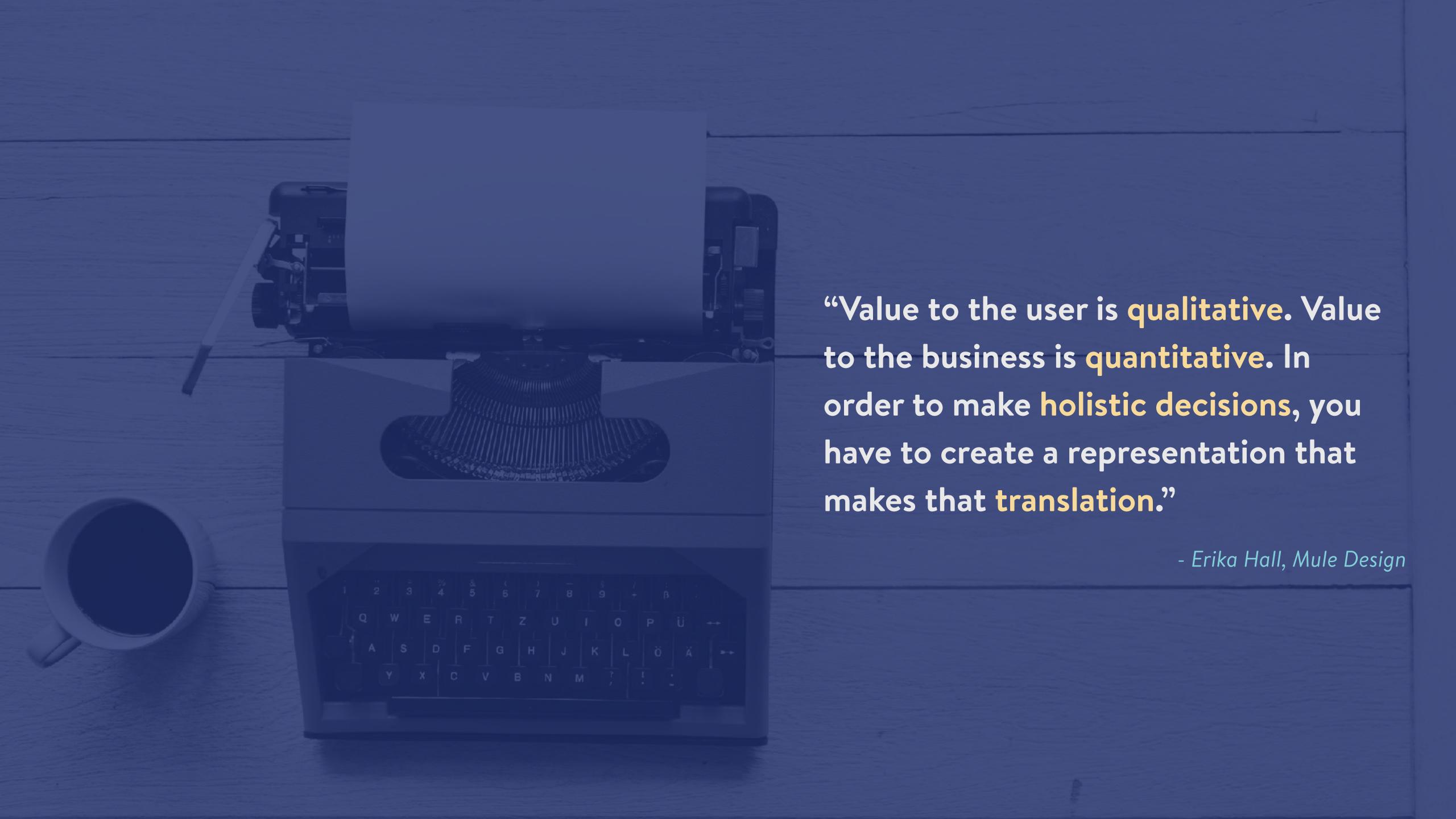


Stage	Question	Qualitative	Quantitative
ldea	What potential problems might we solve?	Existing research, observations, diaries, surveys,	Establish facts, confirm/ disprove assumptions
Think	What are the root problems?	Identify segments, interviews, observations, workshops	Quantify segments
Explore	How might we test assumptions	Lo-fi prototype/mockup testing	Define success metrics, measure baselines
Build	Can people use what we're building?	High-fidelity usability tests, diary studies, beta tests	A/B testing, instrumentation, reporting
Launch	Are people using it in the way we thought they would?	Forums/social media monitoring, feedback forms	Populate reports, monitor success metrics
Tweak	What improvements might be worthwhile?	Analysis of support tickets, retrospective, triangulate	A/B testing, monitor reports



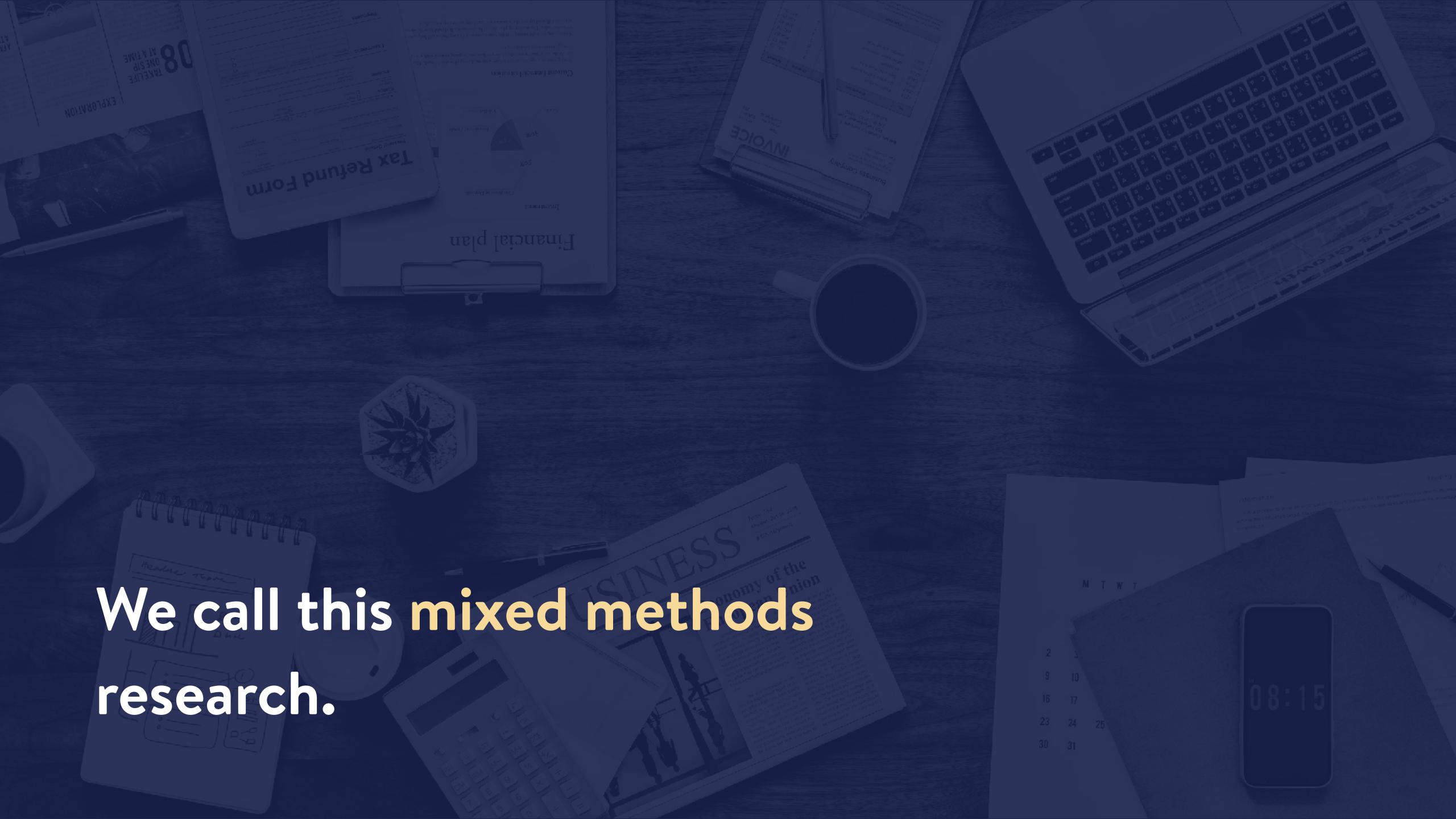


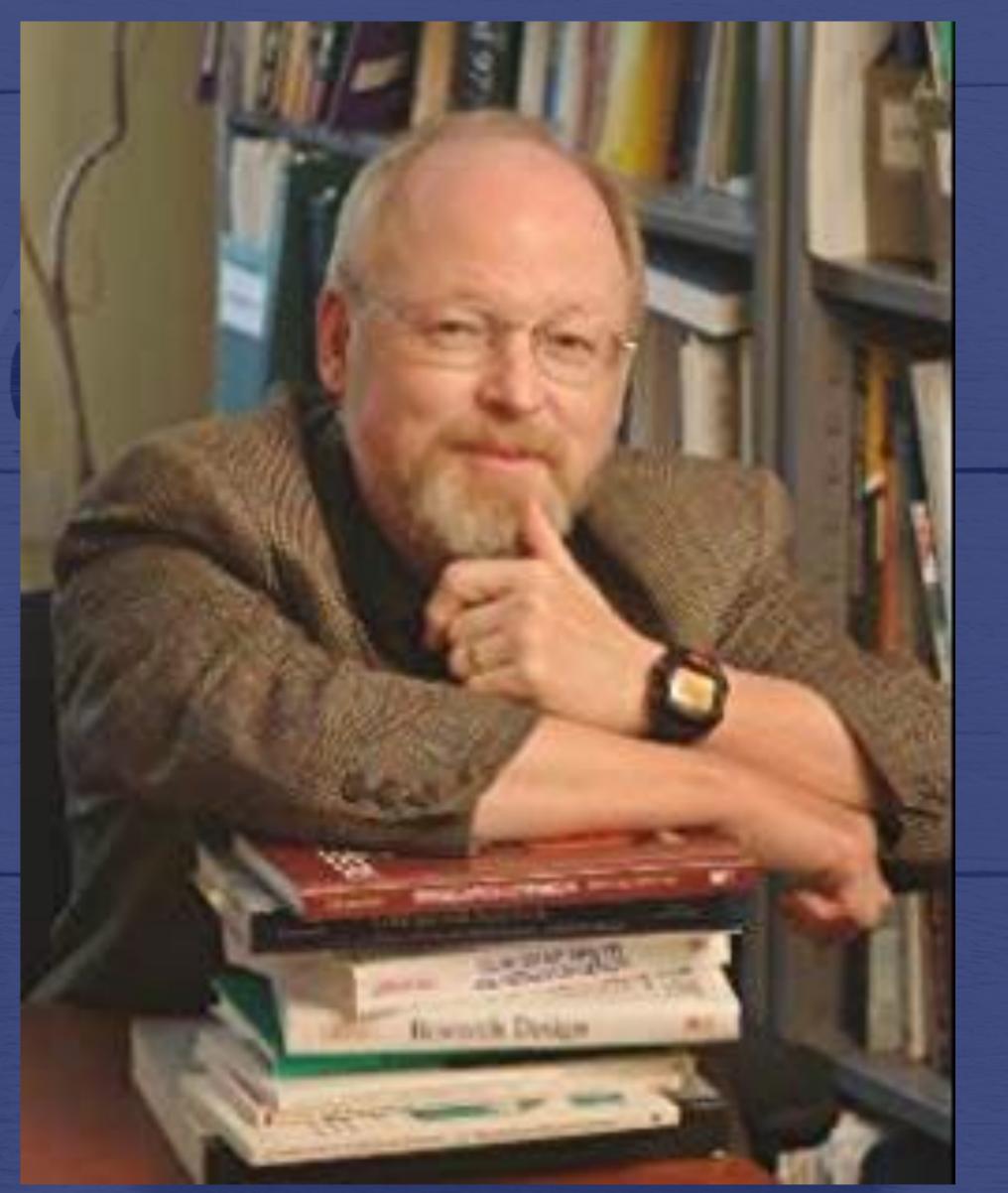












"An approach to research in the social, behavioural, and health sciences in which the investigator gathers both quantitative (closeended) and qualitative (open-ended) data, integrates the two, and then draws interpretations based on the combined strengths of both sets of data to understand research problems."

- John Creswell, University of Michigan

### Strengths

### Weaknesses

Provides detailed perspectives

Captures the voices of the participants

Captures complex phenomena

Adapts to context

Is largely participant-driven

Appeals to people's enjoyment of stories

Is time-intensive when it comes to data collection and analysis

Studies few people

Has limited generalizability

Loses scale

Is subject to the researcher's biases

Is relatively efficient when it comes to
data collection and analysis
Draws conclusions for large numbers of
people
Investigates relationships within data
Appeals to people's preference for
numbers

Does not record the words of the
participants
Is impersonal
Provides limited understanding of the
context of participants
Loses resolution
Is largely researcher-driven

## Three mixed methods designs

1

Convergent design

2

Explanatory sequential design

3

Exploratory sequential design

### Convergent design



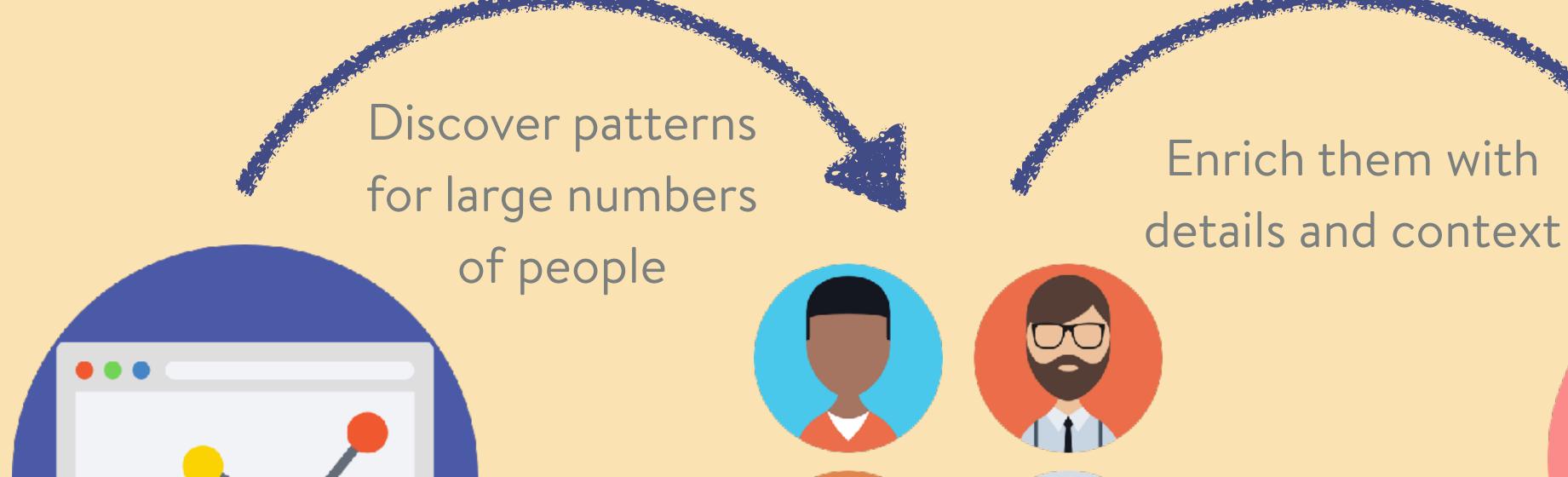
Study large numbers of people



Captured detailed perspectives and complex phenomena

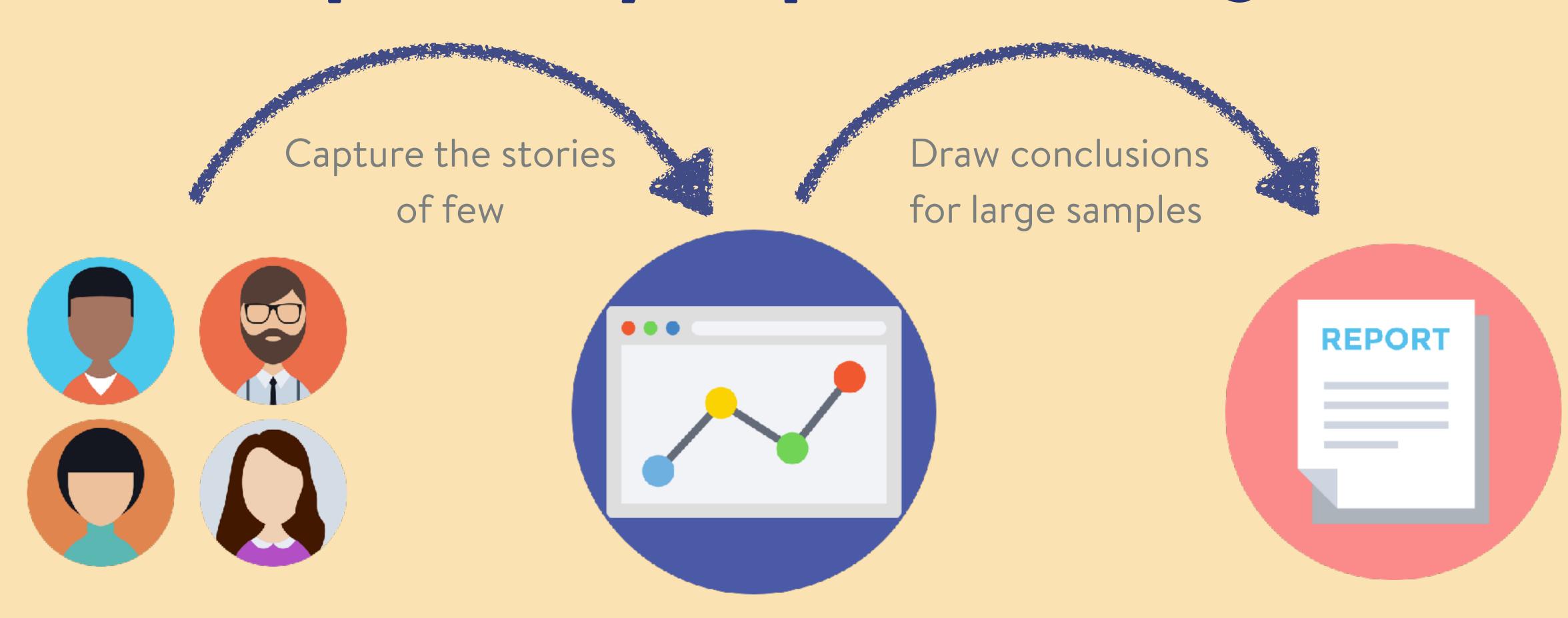


## Explanatory sequential design





## Exploratory sequential design



# IMPORTANT DISCLAIMER: Very few people are equally sk

Very few people are equally skilled at both qualitative and quantitative. The real power lays in understanding enough about both types of methods, and their respective strengths and weaknesses, to be able to have informed conversations and forge collaborations.





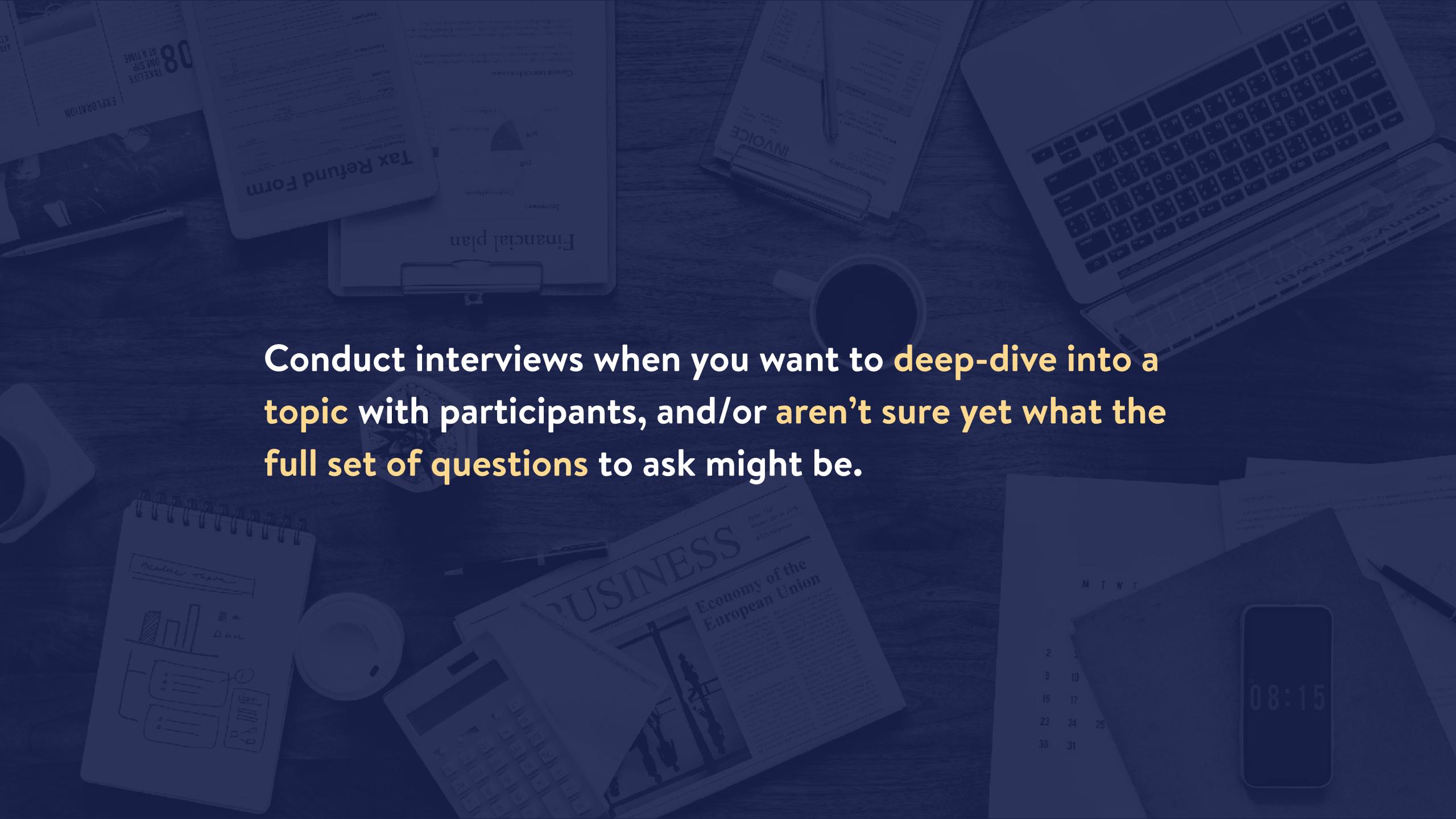
### About interviews

#### Pros:

- You get to really deep-dive into a topic with participants
- They can evolve as you learn
- A good interview can be very engaging for your participants
- You can learn and share stories
- Sharing audio or video snippets can be really powerful

#### Cons:

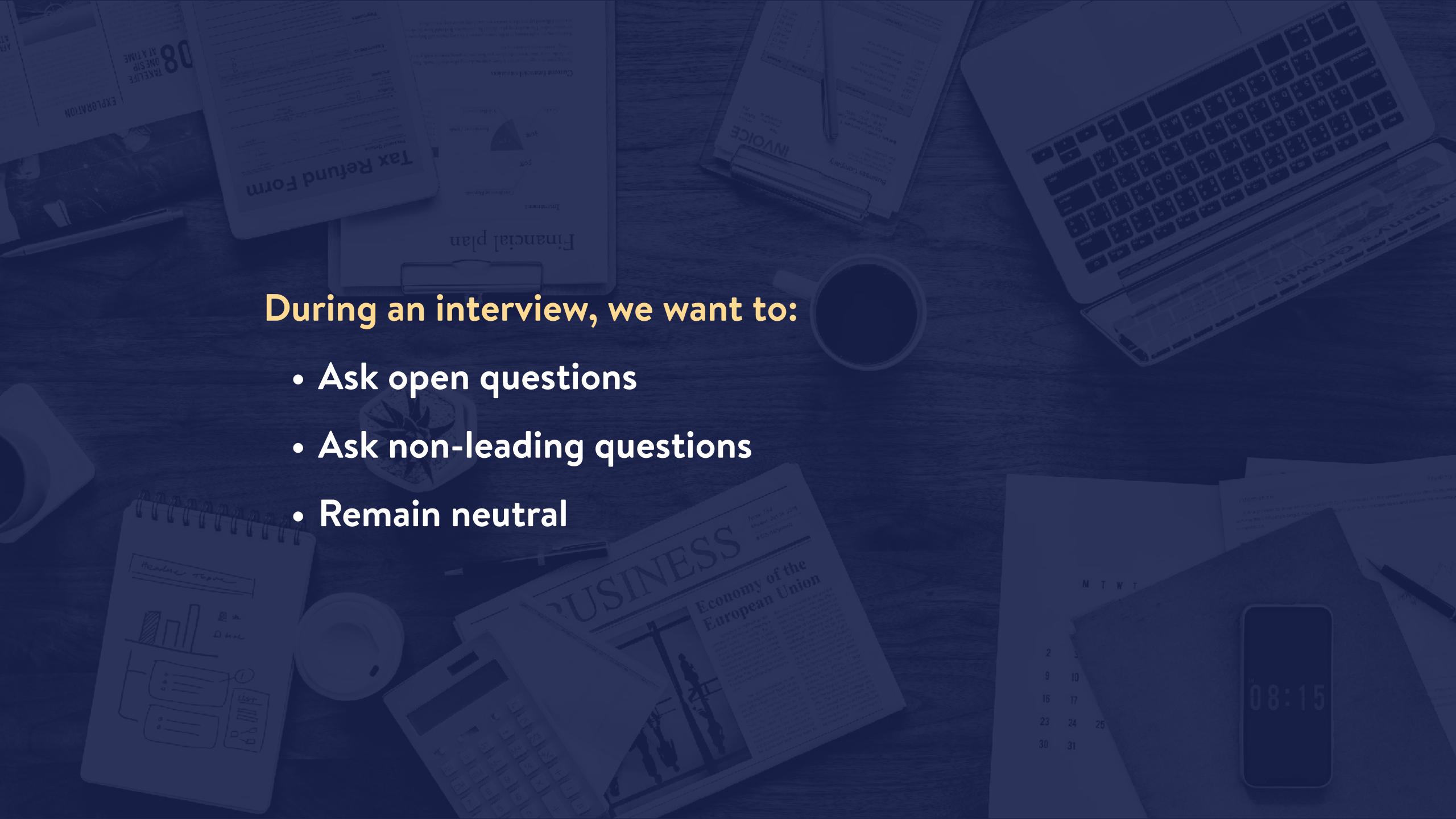
- They are time-consuming to recruit for
- They are time-consuming to conduct
- They are time-consuming to analyze
- You can only speak to small sample set
- Making the results generalizable can be tricky



# Interviewing task

# Interviewing isn't natural

- It goes against how we've been trained to behave socially
- It requires us to set our personalities aside
- It means we actually have to listen to other people
- But there are certain skills that can help us do all this



## Asking open questions

Don't... ask lots of closed questions

- 'Do you do this OR that?'
- o 'Is this important to you?'

- Do... encourage participants to tell 'stories'
- o 'Tell me about the last time you...'
- 'What do you think about...'

## Asking non-leading questions

- Don't... put words in their mouth or suggest answers
- 'How annoying do you find this thing?'
- 'As a do you think it's easy to use?'

- Do... allow them to experience and reflect back to you in their own words
- 'Tell me your thoughts on...'
- 'How have you found doing [this thing]?

# Remaining neutral

Don't... agree too much

- 'Yes that's great'
- 'Well done'

- Do... show with your eyes that you understand and keep conversation-encouragers simple
- 'Mm hmm'
- 'Okay'
- 'Fair enough'



## Don't assume understanding

Don't... interrogate (think of your tone)

- 'Do you really think that?'
- 'Are you sure?'

Do... explore their meaning of their responses (technique called laddering)

- 'Tell me more about that...'
- 'Why?'

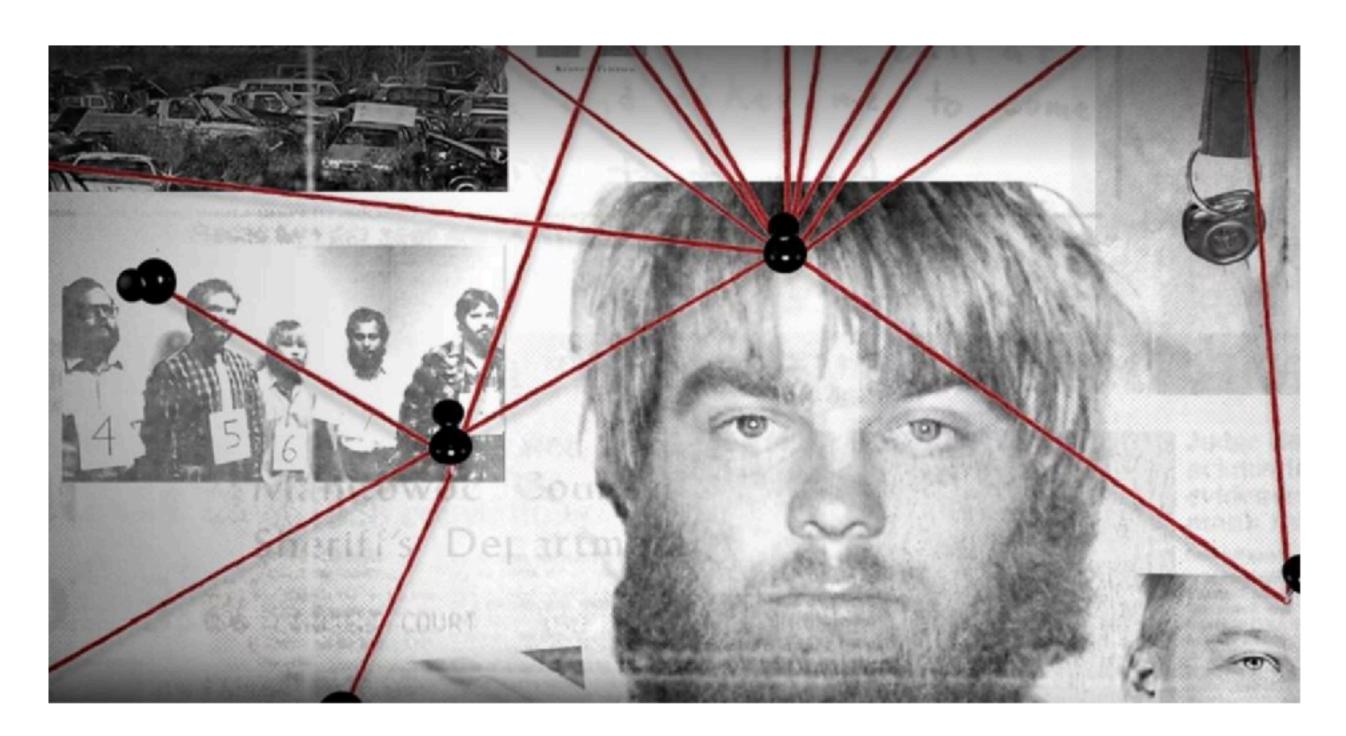
#### Fun fact!

Why do bad interviewing techniques seem so familiar?



#### Alëna louguina

Senior UX Research Lead @shopify. Systems + industrial designer. Currently writing a book 'Systems: From Biology to Design'. I like bugs \*\structure\tau\ \text{Jan 13, 2016} \cdot 5 min read



# Making a Murderer: Lessons for UX Research

https://ux.shopify.com/making-a-murderer-lessons-for-ux-research-fb1ade501c26

# Transcript task

#### A few insider interview techniques

Boomerang Echo Columbo

# Boomerang - Think like a politician!



The facilitator formulates a generic, non-threatening question that they can use to push the participant's question or comment back to them.

Participant: 'Is the point of Shopify to help me start a business?'

Facilitator: 'What do you think is the point of Shopify?' or 'What would you want to get out of using Shopify?'

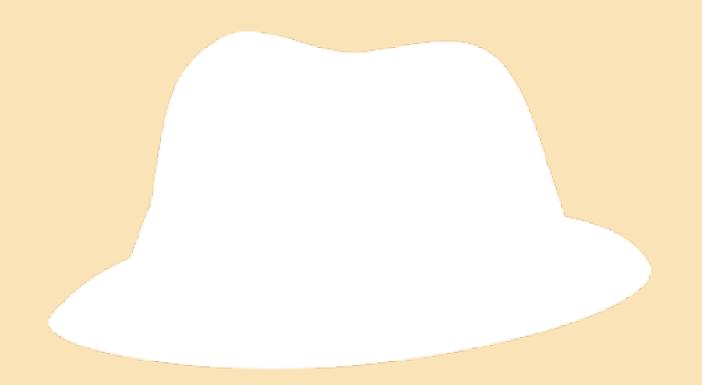
#### Echo

The facilitator repeats the last phrase or word the user said, while using a slight investigative tone

Participant: 'This list of Shopify features is strange, I'm not sure what...'

Facilitator: 'List is strange?' or 'Not sure what...?'

#### Columbo



The facilitator is trying to craft tasks and questions in a way that coaxes people into saying what they think and into doing what comes naturally.

Participant: 'umm do I need to have a credit card to sign up for Shopify?'

Facilitator: '...you are wondering if [pause] you need [pause]...?'





#### Dalia El-Shimy

Senior UX Researcher @Shopify, human woman, <insert random quirky fact here>.
Oct 4, 2016 · 4 min read

# The privilege of asking questions

And what that means for UX researchers

https://ux.shopify.com/the-privilege-of-asking-questions-9870c7ba9810

#### Bonus skill!

Probably THE MOST important of all:



- When you're done asking your (clear, concise) question, pause
- When the participant is done answering the question, pause, in case they have more to say



#### What an ideal session looks like

Mostly the participant talking



## Tips for conducting an interview

- Shut up
- Ask open, non-leading questions
- Remain neutral
- Insider techniques: Boomerang, Echo, Columbo
- Play dumb, don't be an expert

## Deciding on your tech setup

- How are you going to record the interview? (audio/video/notetaker)
- Are you doing this in person or remote?
- Should other people from your team be able to sit in on the interview?
- What is the least friction for the participant?



#### What next?

- Think about the research questions you're trying to answer
- Decide on a method accordingly
- Understand ahead of time what can be changed as a result of this research
  - Make sure everyone understands why the research is being conducted
  - Make sure they understand what might change as a result of this research
  - Agree with your team on what you will do based on the findings
  - Do this before conducting research, not after
- Go forth and research!

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https://www.shopify.com/careers/interns

Thank you!
dalia@shopify.com