

ADOPTING A RESEARCH MINDSET

TIPS AND LESSONS FROM UX RESEARCH AT SHOPIFY

DALIA EL-SHIMY

SENIOR UX RESEARCHER, SHOPIFY



An ecommerce platform made for you

Whether you sell online, on social media, in store, or out of the trunk of your car, Shopify has you covered.

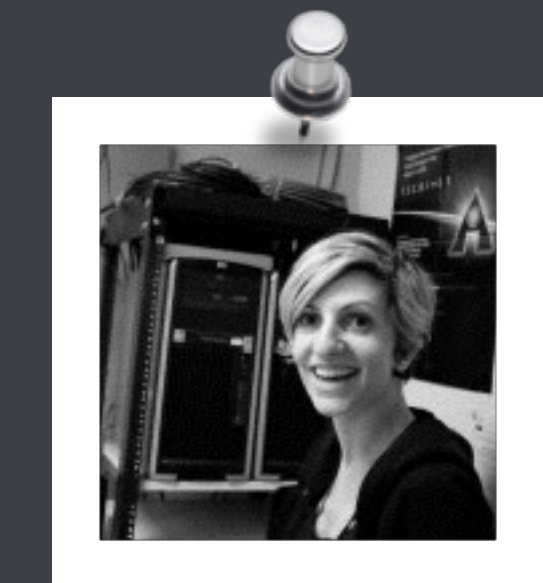
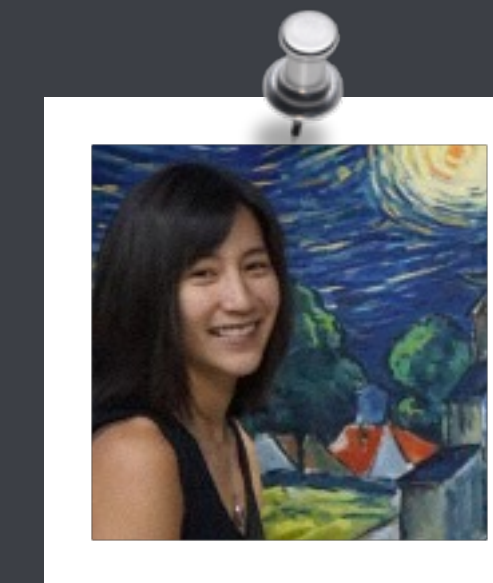
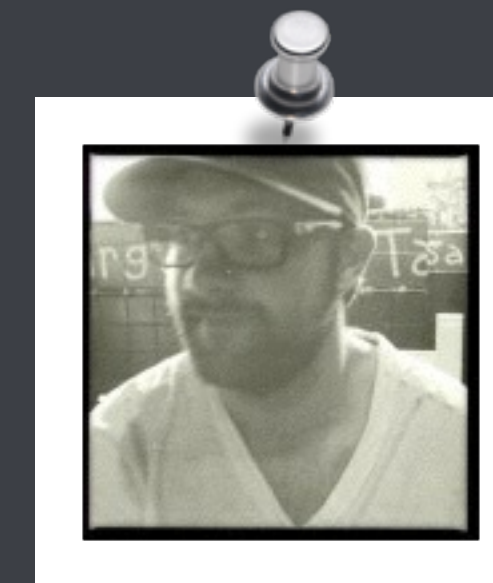
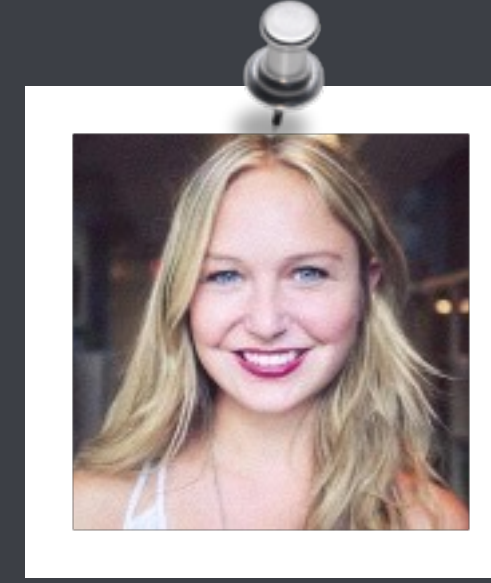
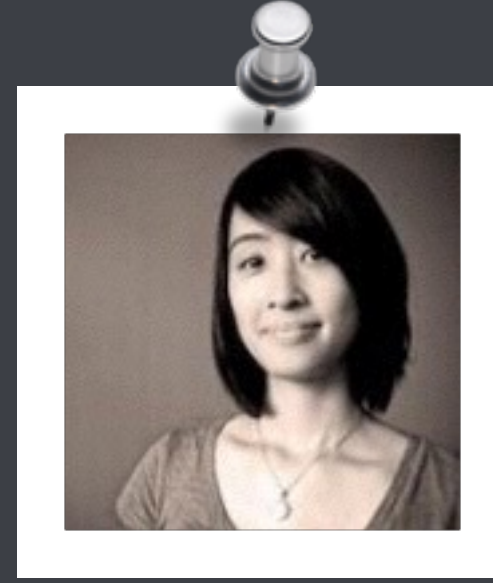
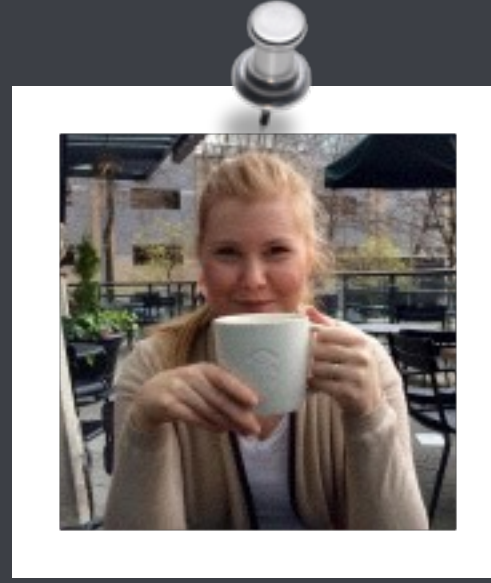
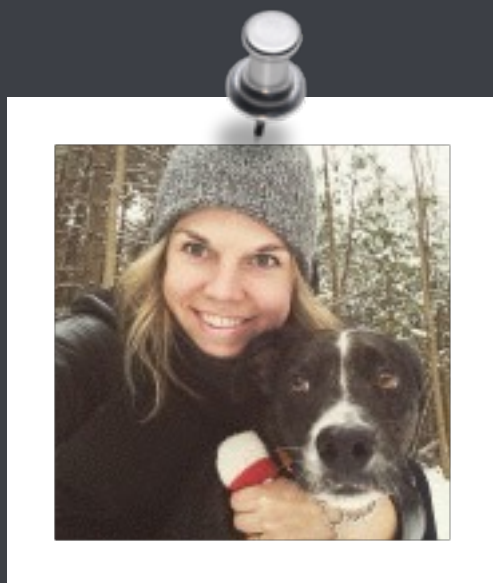
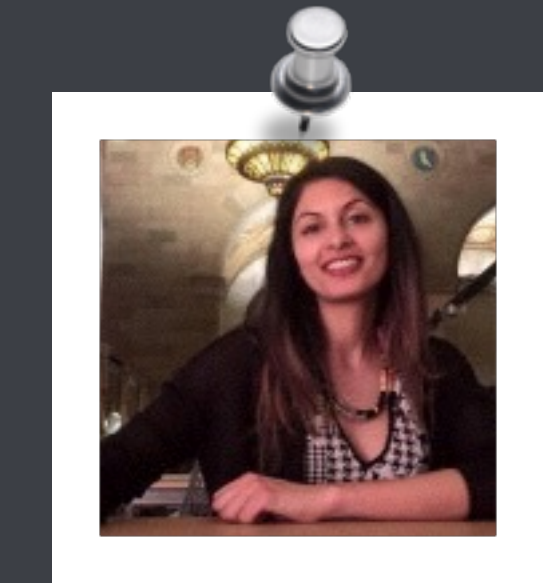
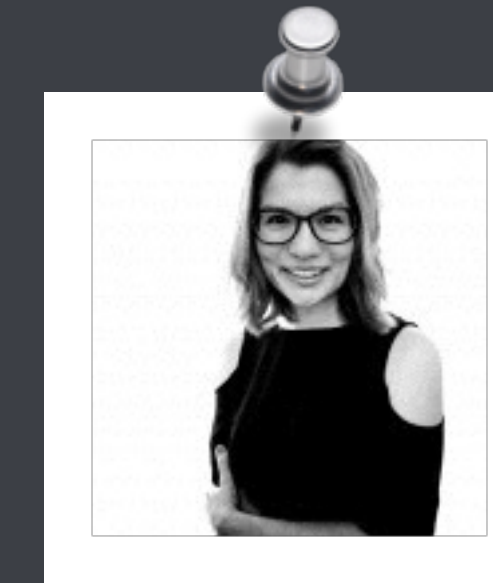
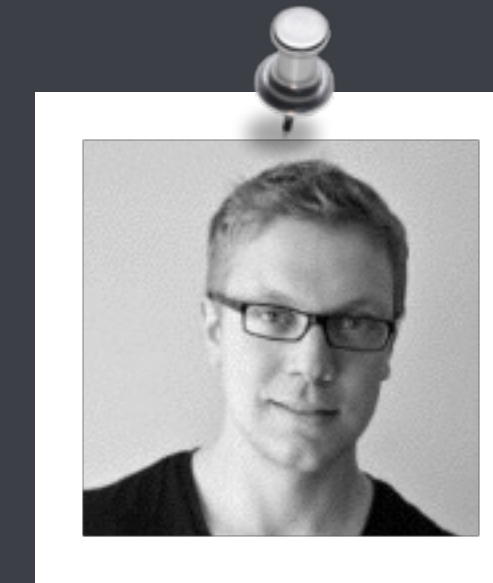
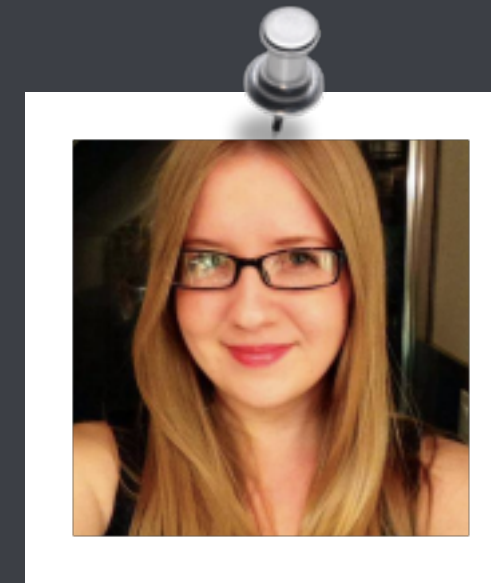
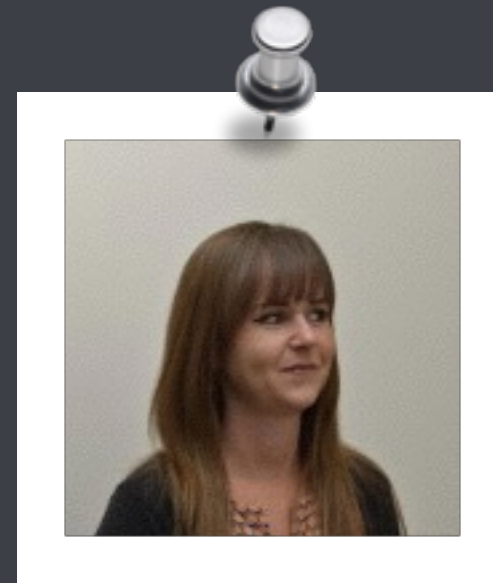
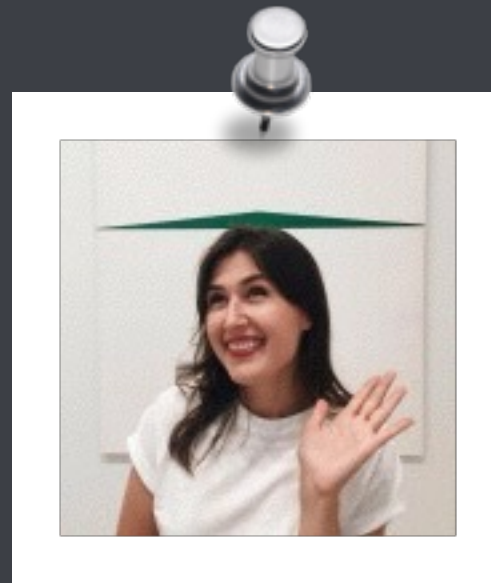
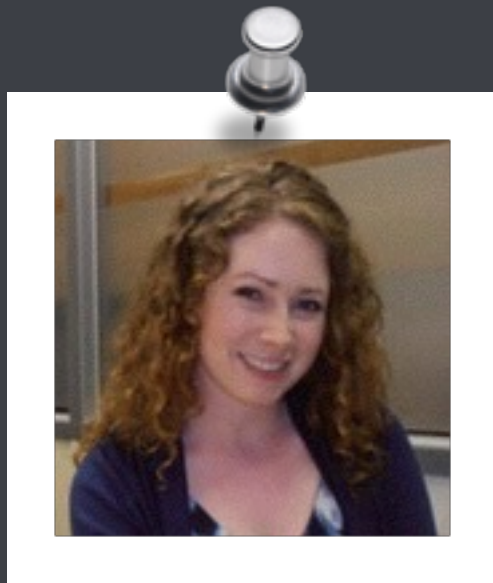
[Get started](#)

Try Shopify free for 14 days. No risk, and no credit card required.





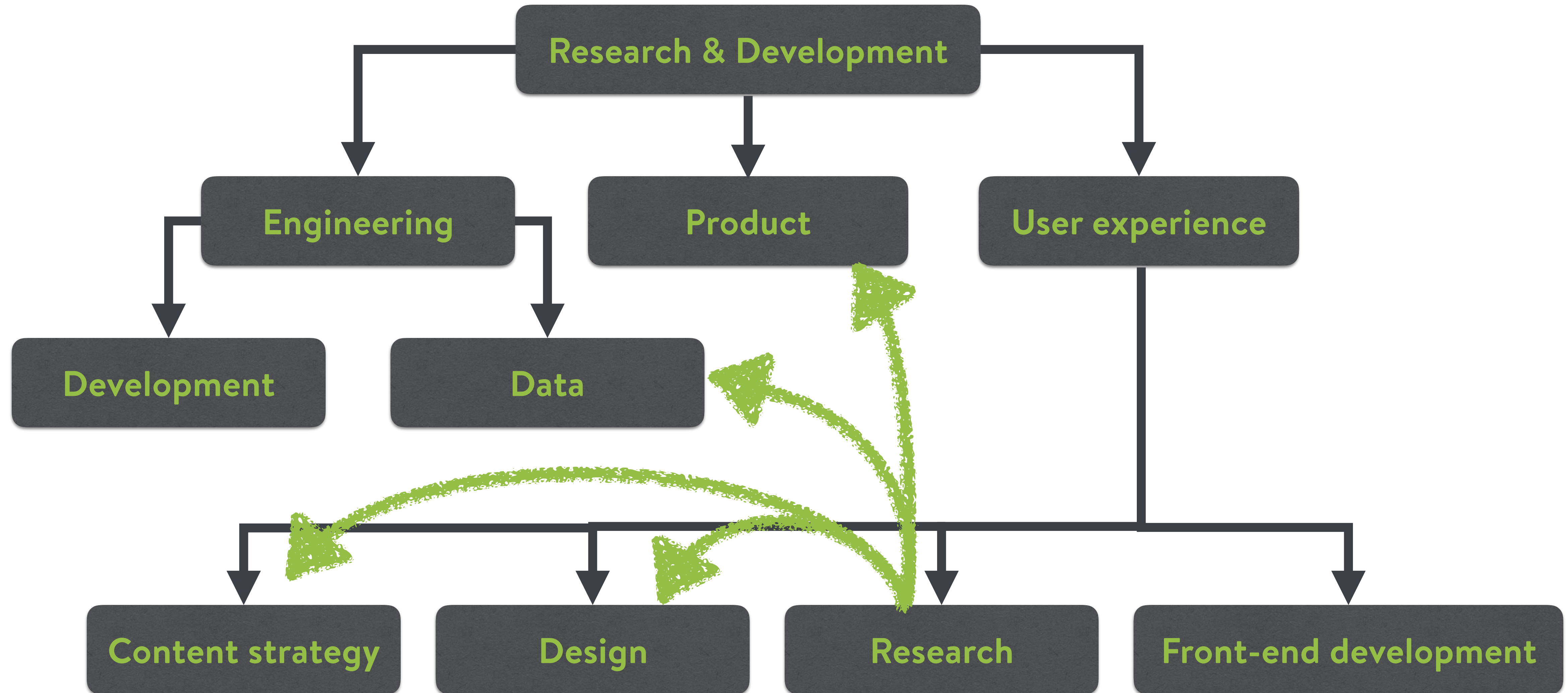
The UX research team



The role of UX research

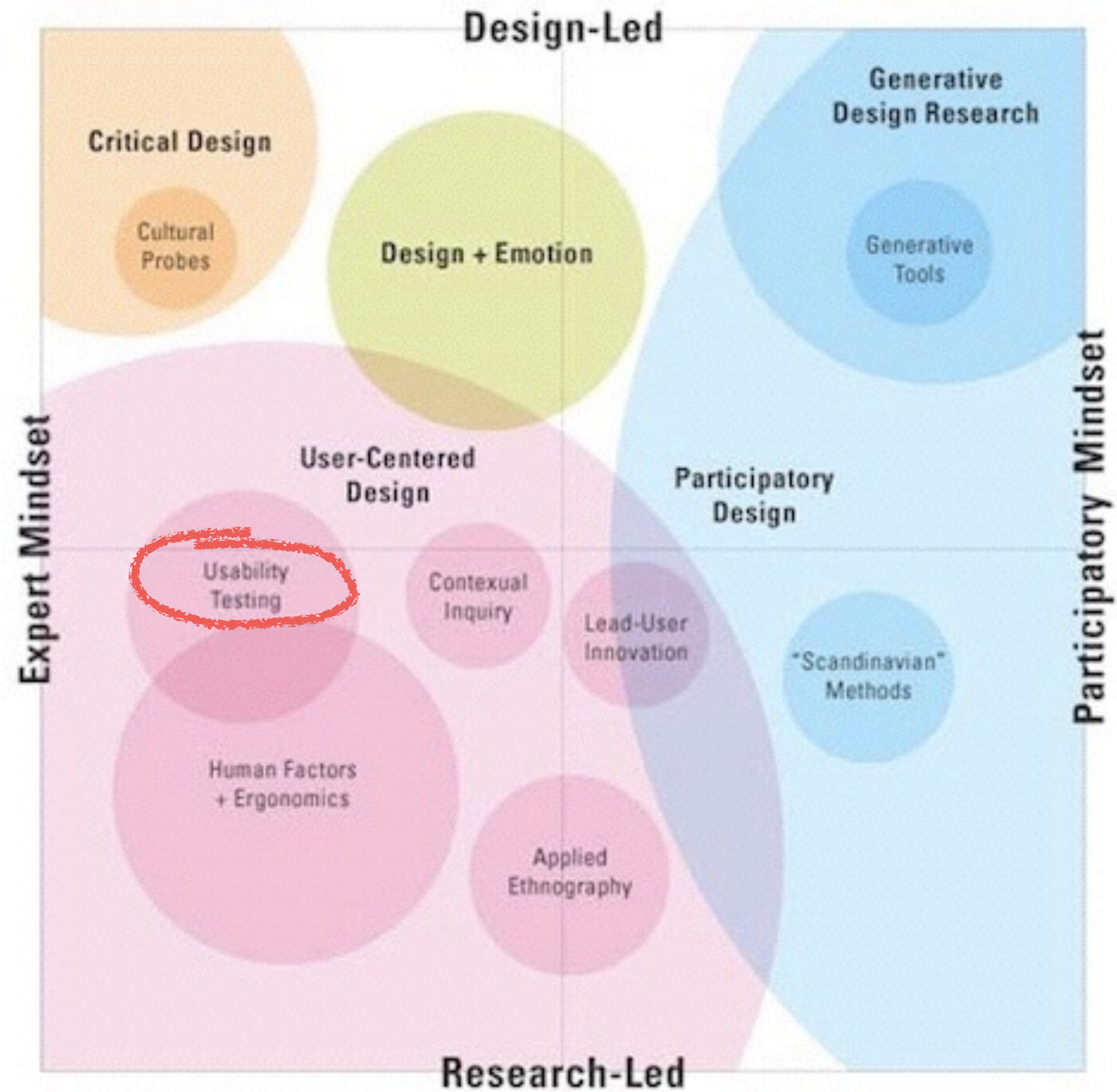
- Understand behaviours/needs/expectations around the product
- Make recommendations accordingly
- See those recommendations through
- Ask questions, find answers, share knowledge
- Encourage empathy across all practices

The role of UX research



USER RESEARCH \neq USABILITY TESTING





WE'RE ALWAYS LOOKING
TO TRY OUT NEW THINGS







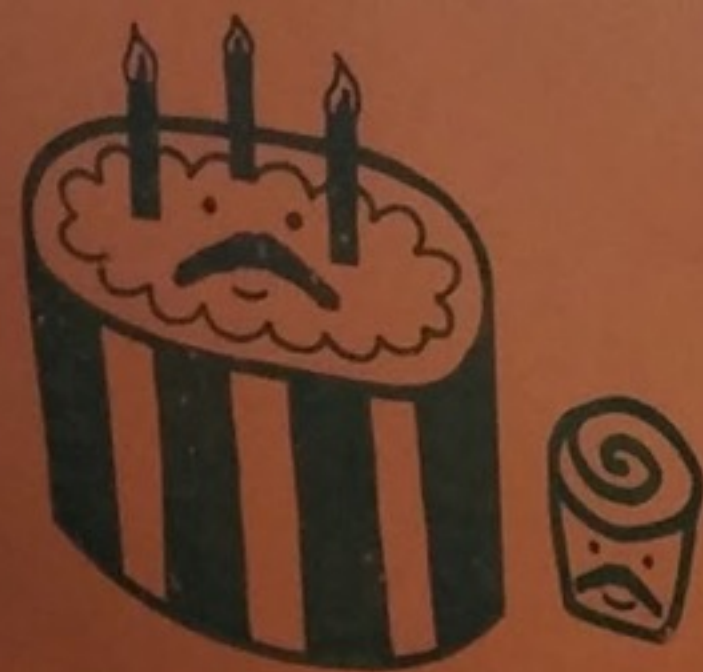


- Payment Gateway ✓
- Checkout Flow
- Additional Checkout buttons
- Credentials

DIVERGENT	CONVERGENT
-Generate ALTERNATIVES	-Evaluate ALTERNATIVES
-OPEN DISCUSSION	-Summarize key points
-DIVERSE VIEWPOINTS	-GROUP IDEAS AND "BUBBLES"
-Devil's Advocate	-ARRIVE AT CONSENSUS
-UNFOLD CHALLENGE	



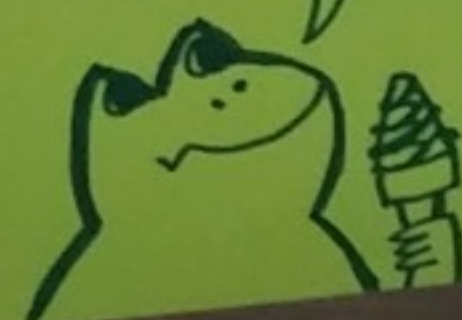
Sweet
Delights



There Will Be Cake

also
a story!

CONGRATS,
DR. EL-SHIMY!!



William
owns me
a story

Red Velvet
Cupcake



\$2.75

Sweet
Delights

Cotton Shirt



\$15

Dapper
Gents

STORE

SO HOW DO WE CHOOSE
THE RIGHT TECHNIQUE?



Getting shit done



Idea



Think



Explore



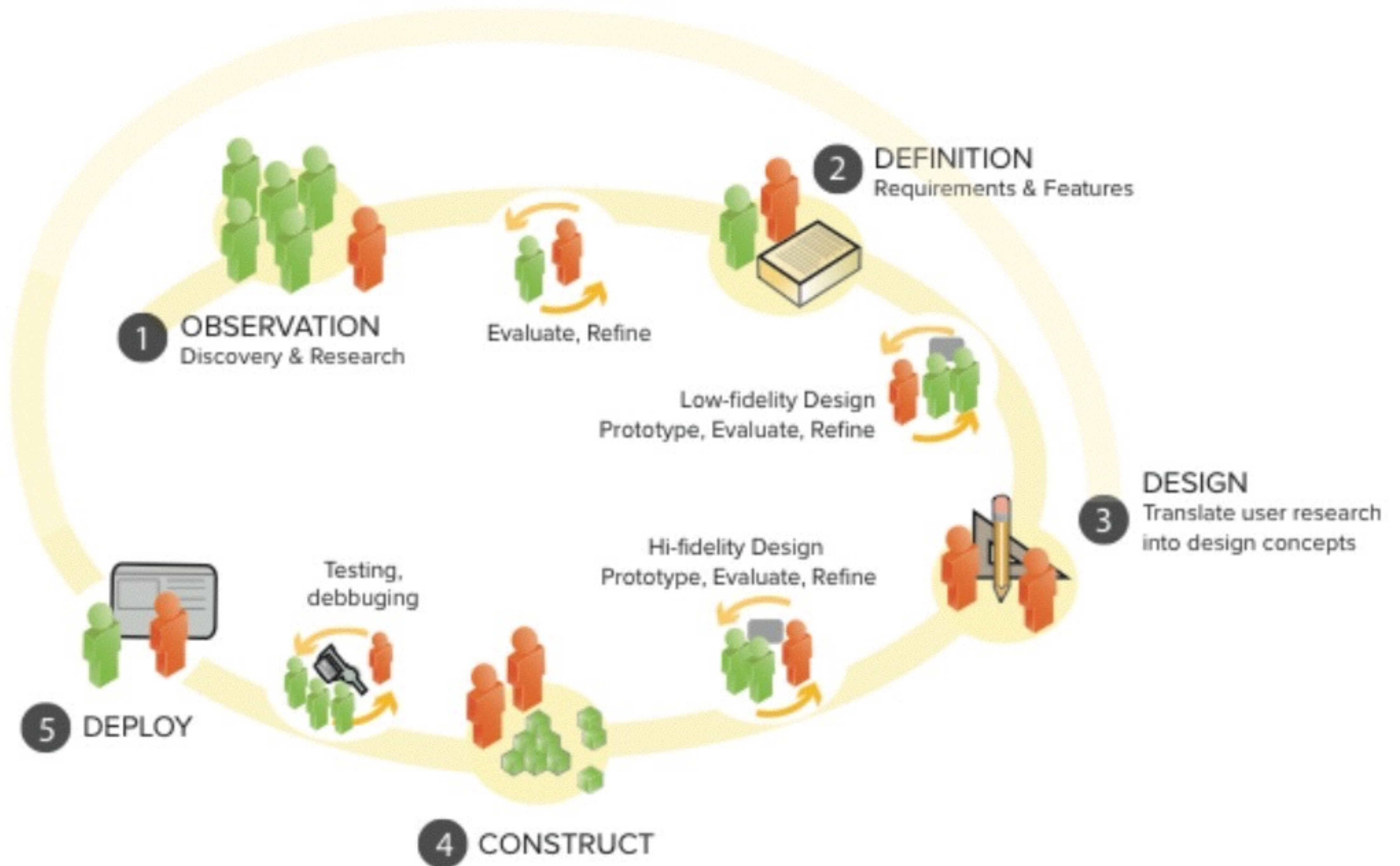
Build



Launch



Tweak



Getting shit done

Questions:

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



Idea



Think



Explore



Build



Launch



Tweak

Research methods:

- Existing research and data
- Observations, interviews, diaries, internal workshops

Getting shit done

Questions:

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



Idea



Think



Explore



Build



Launch



Tweak

Research methods:

- Profiles/segments/personas
- Interviews, co-design/participatory workshops

Getting shit done

Questions:

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



Idea



Think



Explore



Build



Launch



Tweak

Research methods:

- Lo-fi prototype testing
- Clickable mockups

Getting shit done

Questions:

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



Idea



Think



Explore



Build



Launch



Tweak

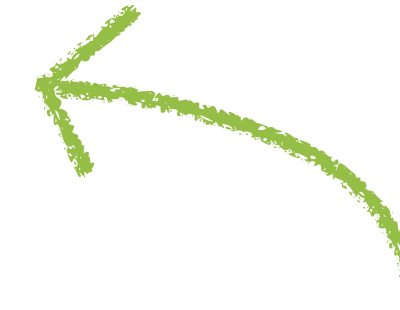
Research methods:

- High-fidelity usability tests
- Diary studies
- Beta testing

Getting shit done

Questions:

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



Idea



Think



Explore



Build



Launch



Tweak

Research methods:

- Forums/social media monitoring
- Open-form feedback forms



Getting shit done

Questions:

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



Idea



Think



Explore



Build



Launch



Tweak

Research methods:

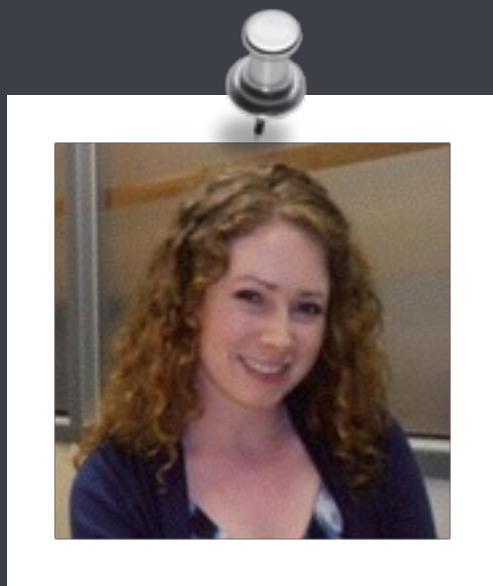
- Retrospectives
- Post-mortem
- Analysis of support tickets



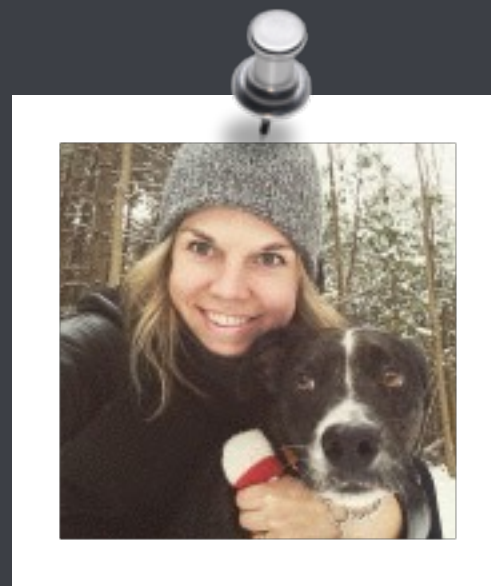
SO WHAT DO YOU DO WHEN YOU DON'T HAVE
DEDICATED RESEARCHERS?



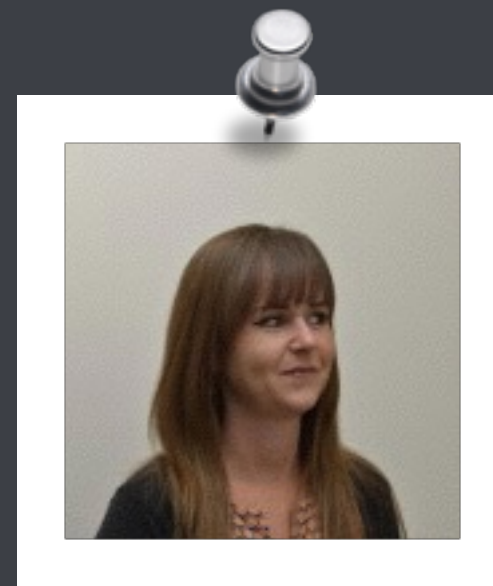
The UX research team



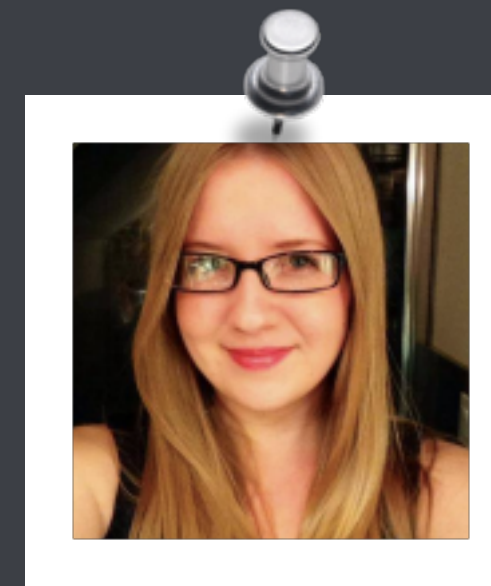
Design/MBA



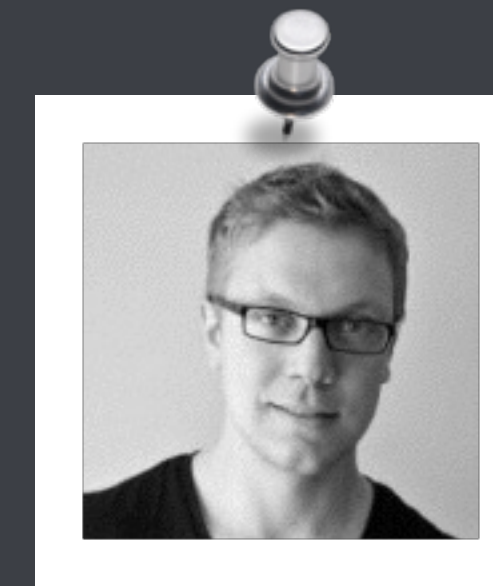
Graphic
design



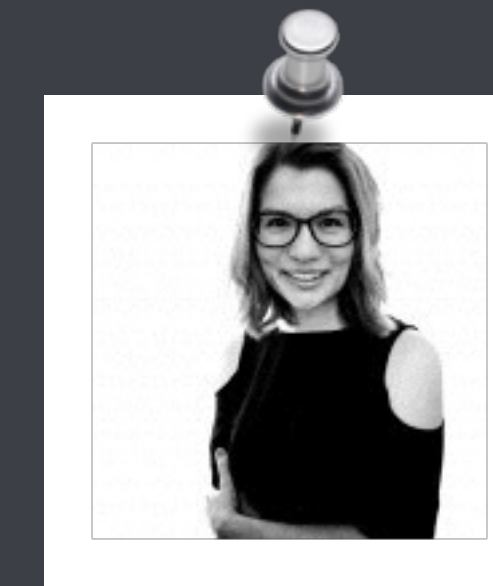
Psychology



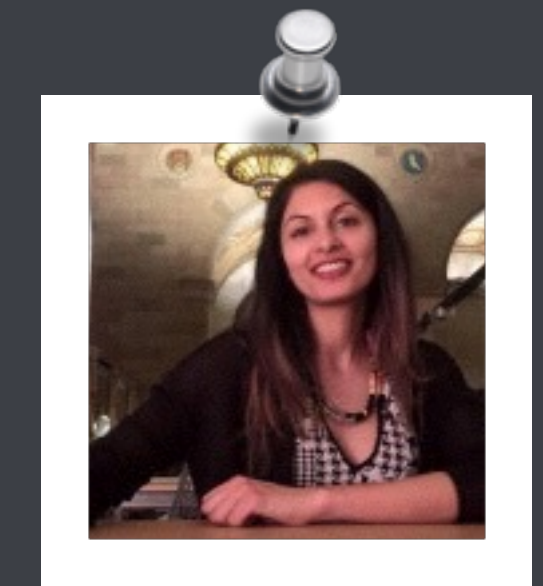
Psychology



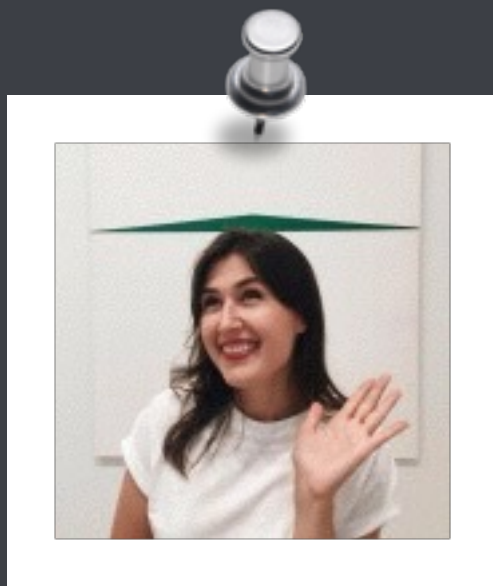
Industrial
Design



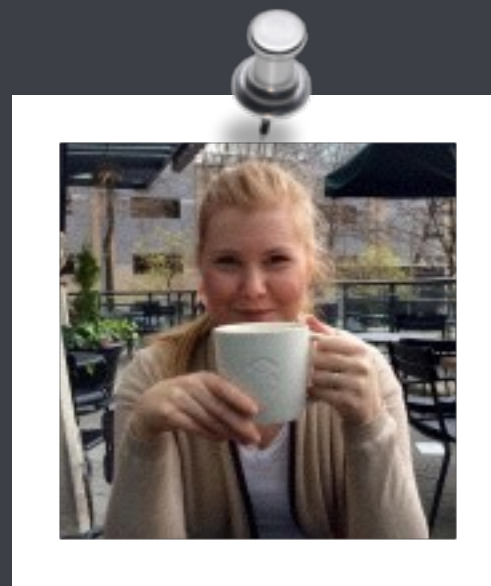
Industrial
Design



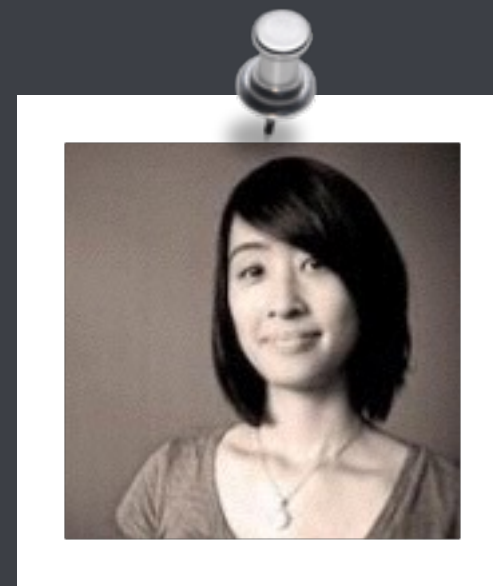
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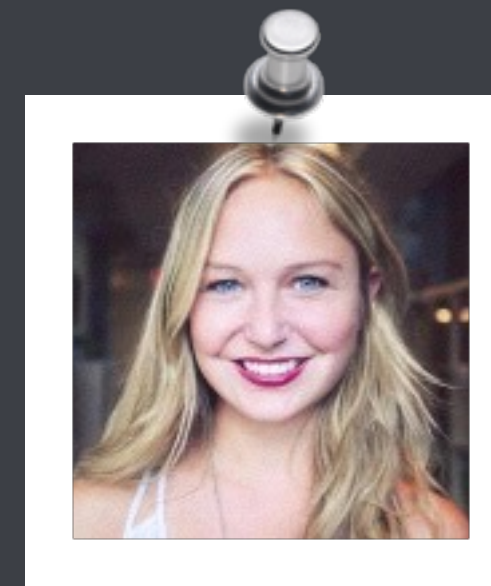
Art History



Public
Relations



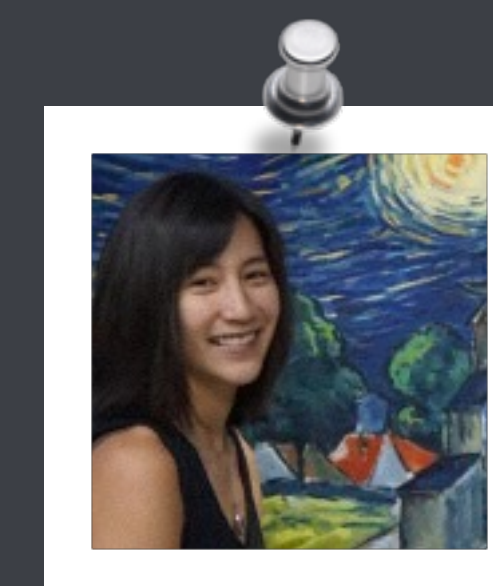
Accounting



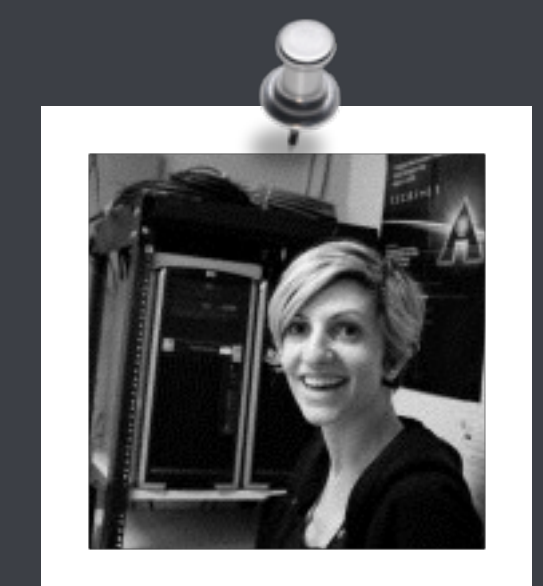
Commerce/
Marketing



Commerce/
Marketing



Computer
Science



Electrical
Engineering

WE'RE ALL DRAWN BY A SENSE OF CURIOSITY...
AND A COMPULSION TO ASK QUESTIONS.



$$\frac{dN}{dt} = \frac{1}{qV_{act}} - q_0(N-N_0)(1-\epsilon S)S + \frac{N_e}{\tau_n} - \frac{N}{\tau_p}$$

$$\frac{dS}{dt} = T_0 q_0(N-N_0)(1-\epsilon S)S + \frac{q_0 N}{\tau_n} - \frac{S}{\tau_p}$$

$$\frac{S}{P_c} = \frac{\tau_p \chi_0}{V_{act} n_{ph}} = \odot$$

$$S \leq \frac{1}{\epsilon}$$

$$N = 1$$

$$P_t = (m$$



WHY GOOD ENGINEERS (SOMETIMES) CREATE BAD INTERFACES

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ABSTRACT

This paper presents a view of system design that shows how good engineering practice can lead to poor user interfaces. From the engineer's perspective, the ideal interface reflects the underlying mechanism and affords direct access to the control points of the mechanism. The designer of the user interface is often also the designer of the mechanism (or at least is very familiar with the mechanism), and thus has a strong bias toward basing the interface on the engineering model. The user, however, wants to complete a task, and an interface that is based on the task is often more appropriate than one based on the system mechanism. We discuss these issues, and also discuss where to position the user interface between the poles of the engineering model and the task model.

KEYWORDS: User interface, design, engineering, task model.

ENGINEERING MODELS AND TASK MODELS

For our discussion, we will use a very simple model of a system. A *system* consists of an underlying *mechanism* that produces the desired *behavior*. Of course, we don't always want exactly the same behavior, so the mechanism has several *control points* that alter its workings and change the behavior. The control points in a mechanical system might be valves or levers, while the control points in a computer software system might be variables or procedure arguments.

The main thesis of this paper is that a good engineer's model of the system is based on knowledge of the underlying mechanism, and therefore the interface most natural to the engineer is one that provides direct access to the control points in the mechanism. The user, however, is primarily concerned with the task to be accomplished, and a problem arises if the user's model of the task does not map cleanly onto the system mechanism. The user may not need to access control points directly or may wish to access a set of control points in systematically constrained ways. In that case, the engineer's ideal interface will not be a good interface for the user. It may be advantageous to base the user interface on a task model instead. This paper explores some of the factors involved in making this decision.

ADVANTAGES OF BASING THE INTERFACE ON A TASK MODEL

An example: The carburetor

We can illustrate these points by examining the carburetor on an automobile engine.¹ As shown in cross-section in Figure 1, a carburetor has two main valves. The choke valve, in the upper portion of the carburetor, controls the amount of air entering the carburetor and hence the proportion of air in the gas-air mixture. The throttle valve below controls the total amount of gas-air mixture passing through to the engine. These two valves are major control points for the engine, and it is not surprising that the interfaces for early automobiles provided the driver with levers and knobs directly connected to the choke and throttle valves. But as automobile interfaces evolved over the next 100 years, only the fittest portions survived because most

¹This discussion refers to the mechanical carburetors common before the 1980's. We have little idea how modern computerized carburetors operate.

The point of these examples is to show that engineers sometimes are so involved in the mechanism of their systems that they are blinded to the probability that the user is more interested in accomplishing a task than in manipulating the mechanism. At CHI+GI'87, Tom Landauer [9] noted that once designers understand the underlying system mechanism, they cannot help being influenced by their knowledge. He used the analogy of a hidden figure in a picture – once the figure is pointed out, you will always see it. You cannot return to your initial naive state.

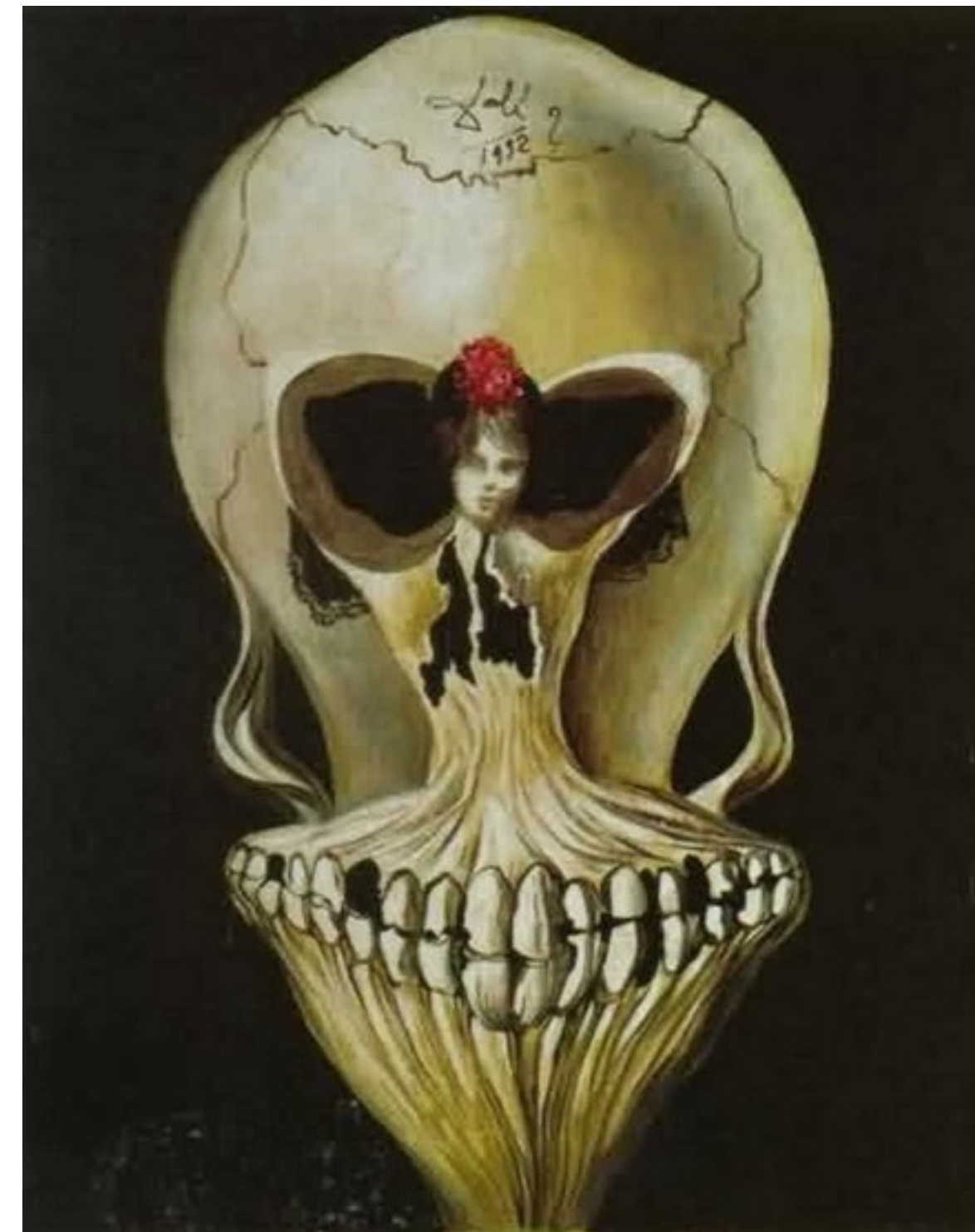






Photo by Bob Mazzer

ANYONE CAN ADOPT A RESEARCH MINDSET



IT'S A MATTER OF
ASKING QUESTIONS,
FINDING ANSWERS,
SHARING KNOWLEDGE,
AND ENCOURAGING EMPATHY.



Tip #1:

ACCEPT THAT THERE IS NO “ONE-SIZE-FITS-ALL”
METHOD



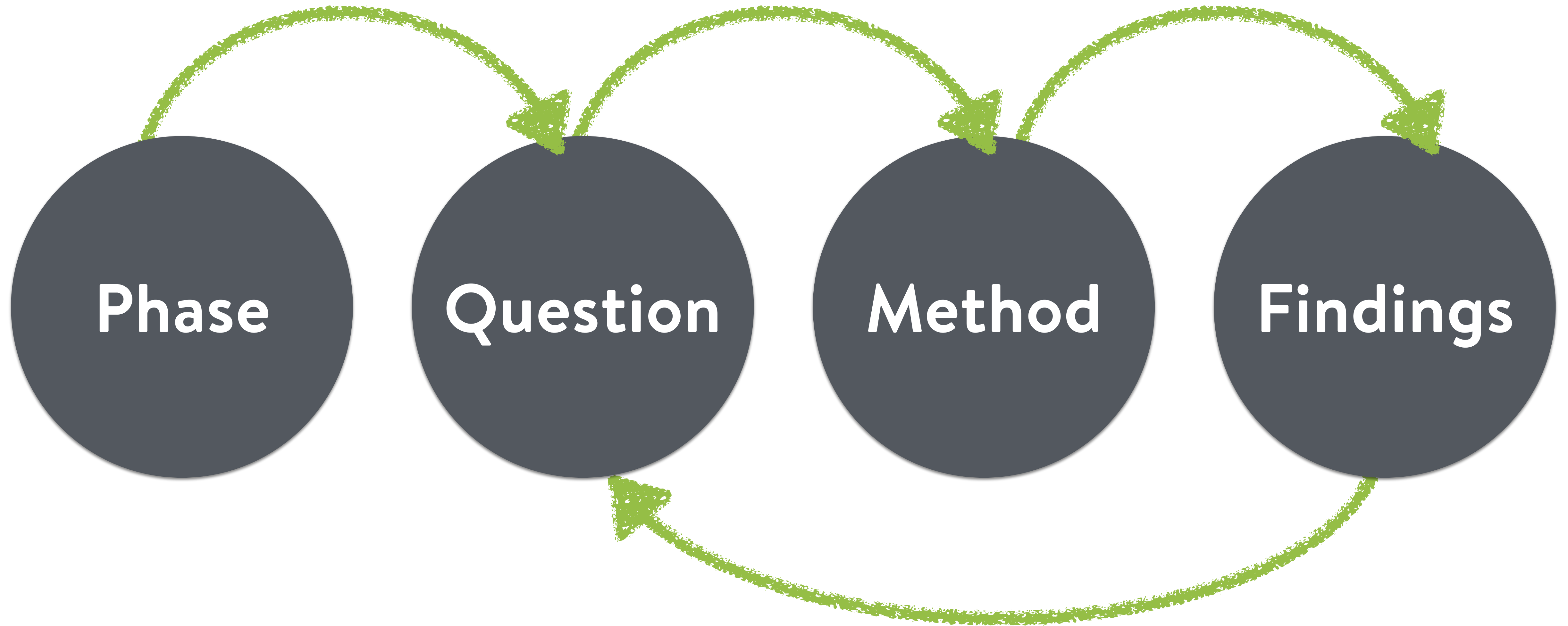


~~We need to run
a usability study
to...~~



**We'd like to learn
more about...**

GSD phase	Research question	Research method
Idea	What potential problems might we solve?	Existing research and data
Think	What are the root problems?	Interviews, co-design/participatory workshops
Explore	How might we test assumptions and hypotheses?	Lo-fi prototype/mockup testing
Build	Can people use what we're building?	High-fidelity usability tests, diary studies, beta tests
Launch	Are people using it in the way we thought they would?	Forums/social media monitoring
Tweak	What improvements might be worthwhile?	Analysis of support tickets, retrospective

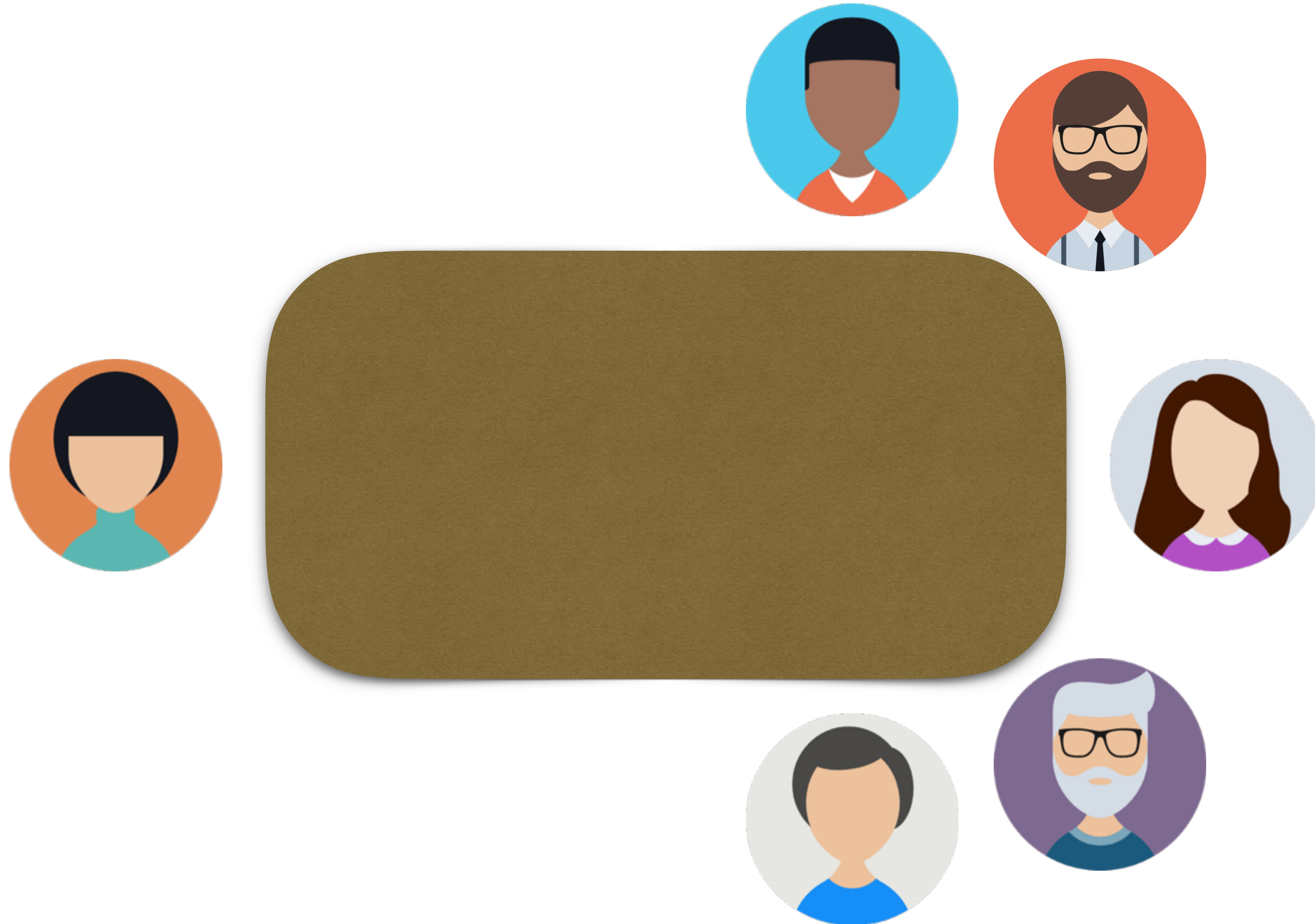


Tip #2:

ALLOW THE USER'S ROLE TO BE FLUID



Having a one-way conversation



Having a two-way conversation



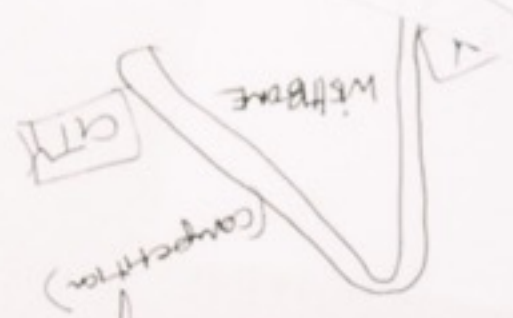
Co-designing



Tip #3:

CHOOSE TO BE PROBLEM-ORIENTED





giving, cities put their tweet up

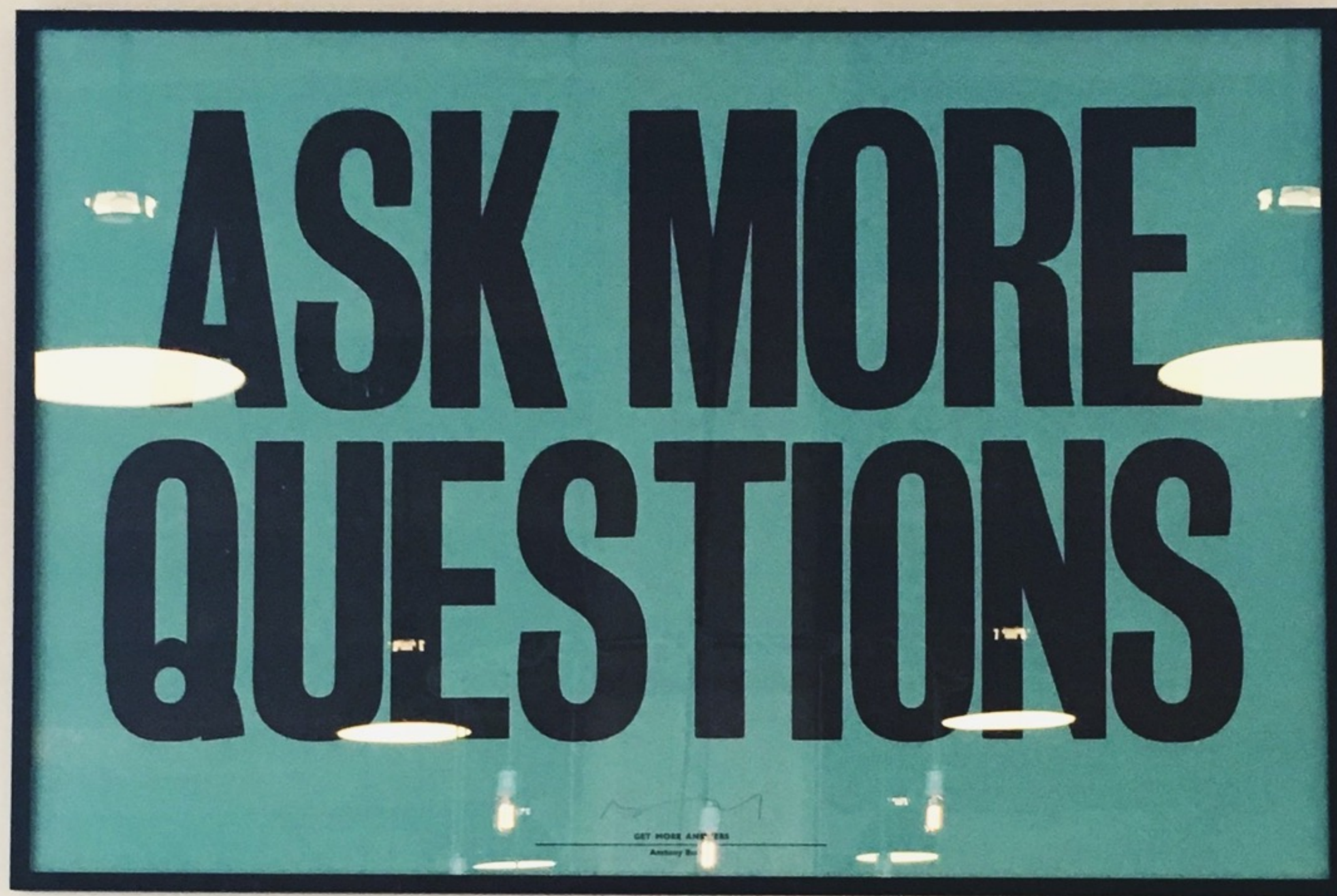


ADD ACTION



InfoGRAPHIC
↳ Mind/Graphic
↳ Inside
↳ Desk/Life
↳ objects
↳ important
↳ Mainly as a
↳ photo-graphed thing
↳ like tea, shoes, hair, etc.
↳ (cup of tea, car, pencil, infographic)



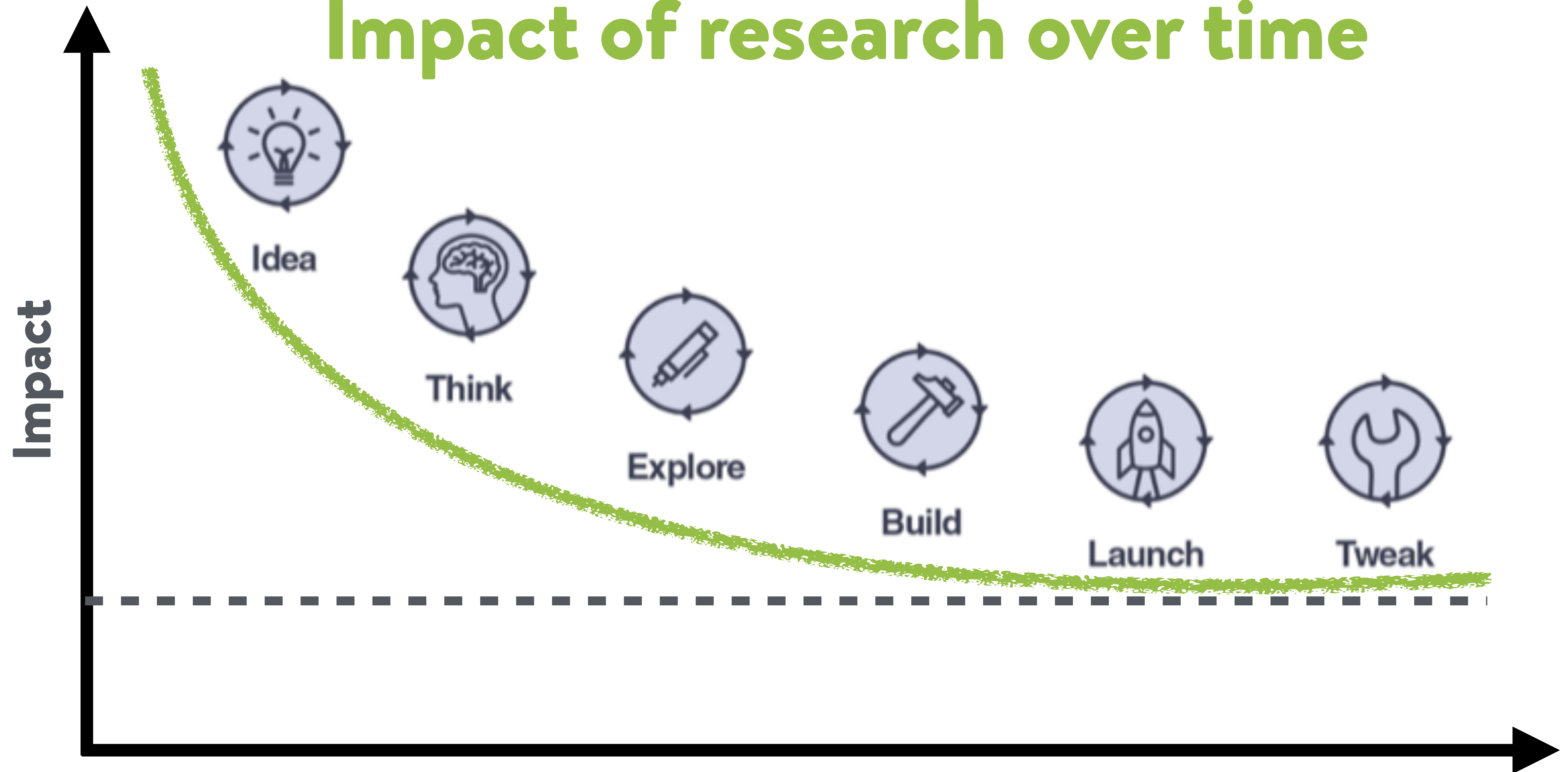


Tip #4:

ASK EARLY, AND ASK OFTEN



Impact of research over time



Tip #5:

FIND INFORMATION ALL AROUND YOU



Analytics



Support





TOPIC



Jane
Member

Posts: 36

Discount code - Limit to 1 time per customer

September 20, 2013

125

Hi,

This post is outdated

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

There's only an option How many times can this discount be used? Does this apply to 1 customer or overall?

Thanks.




REPLIES

Discussion Forums

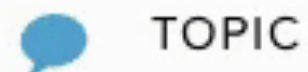


Home > Discussion Forums > Ecommerce Marketing > Discount code - Limit to 1 time per customer


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

Hi,

This post is outdated

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



rickydazla

Shopify Expert

experts.shopify.com/tricky3

Posts: 648

Last edited 7 months ago

A small, exciting update to share: Merchants can now create discount codes that have a usage limit of one per customer.

That means that instead of creating one discount code per customer (possibly creating hundreds of thousands), merchants now only need to create one discount code and mark it as "once per customer," so that each customer can only use it once.

Thread Closed!

I'm a million different people

Reply



shopify sections

Top Latest Accounts Photos Videos More options

Who to follow · Refresh · View all



Gordon Hatusupy @gordon...
Followed by [Dylan Blanchar](#)...

Follow



LizardBats Allen @elizall...
Followed by [Jen Chow](#) and ...

Follow



Lifehacker @lifehacker

Follow

Find friends

Trends · Change

#ouaxc

#WASvsCIN
37.1K Tweets

#Diwali 🪔
118K Tweets

#SundayFunday
10K Tweets

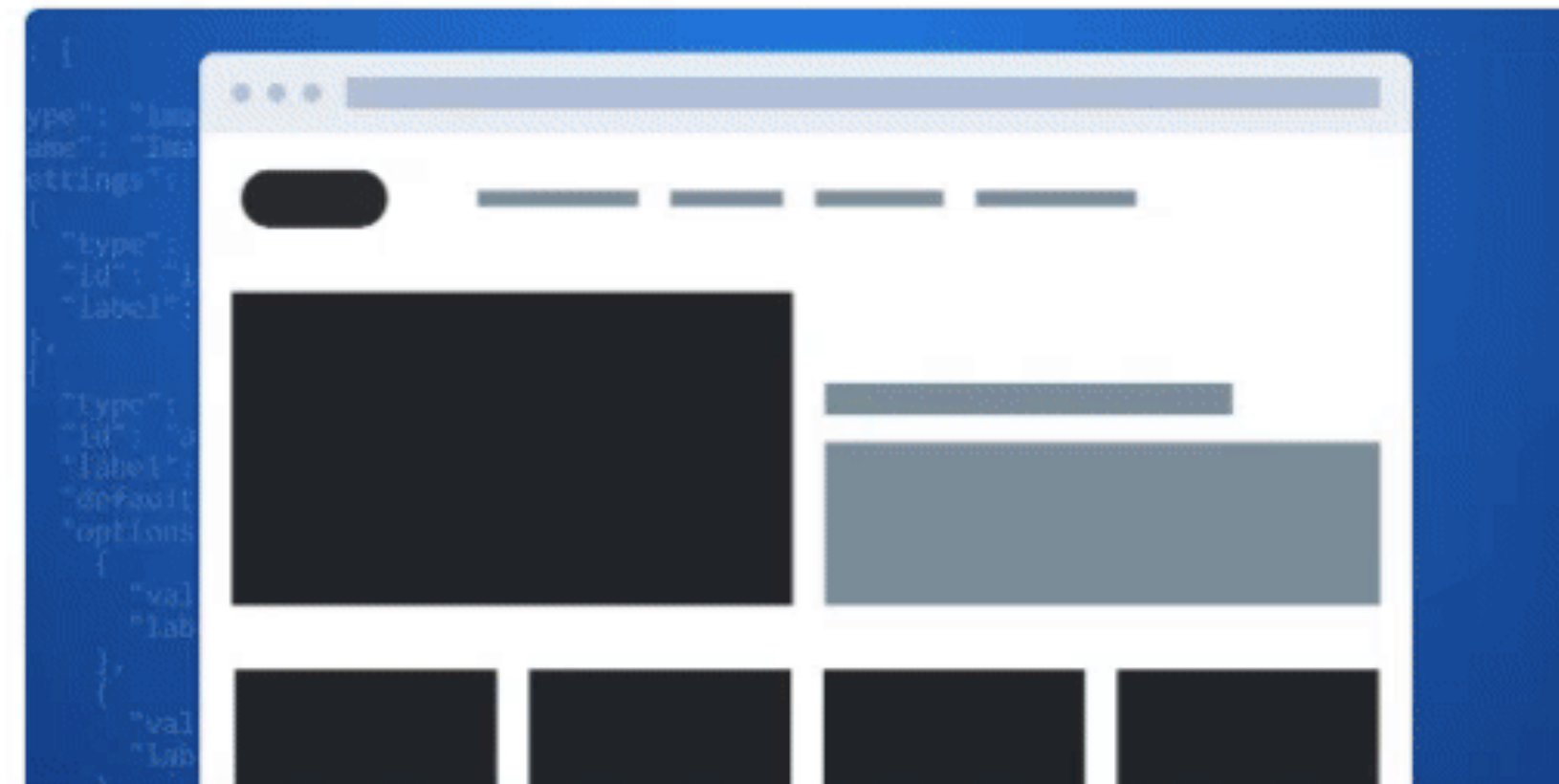
#Patriots 🇺🇸
18.5K Tweets

#howshehustles



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](#)

Retweet 1 Like 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

SHOPIFY ENTREPRENEURS


Carson

Shopify Entrepreneurs

Secret crew

Boarded

Blabber t' yer mates

Hail-shots

Main Deck

Crew

Grog Fests

Bewitched Portraits

More


Scour the crew!!

Scrawl Message

Portrait or Bewitched Portrait


Poll

More



Scrawl somethin'

PINNED POST



Jonathan Kennedy

Month o' May 9 · Port Montreal in the whereabouts o' QC

Please read before posting! Thank you.

This is a private community for intermediate and advanced Shopify sellers and customers of www.HeyCarson.com, a leading Shopify expert company.

Get 1 on 1 support from expert developers for only \$199/month. >
<https://heycarson.com/pages/pricing> (Sign up and send me a PM to set up a free growth call - only requirement is a live Shopify store)...(tharr be more)

Continue further down this 'ere scroll




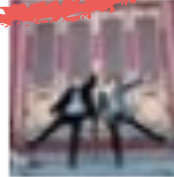
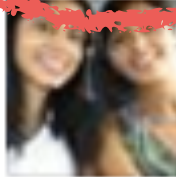

ADD SCALLYWAGS

+ Enter name or email address...

CREW 18,834 Members

416 scallywags be boardin')

MATES



WHAT IT BE ARRRBOUT

Shopify Entrepreneurs is a group of Shopify store owners, store ...(tharr be more) [Peer into the depths](#)

GROUP TYPE

Support

TAGS

[Shopify](#) · [E-Commerce](#) · [Entrepreneurship](#) · [More](#)

GATHER YE'SELF A NEW CREW

Tip #6:

TIGHTEN YOUR FEEDBACK LOOP



Qualitative

e.g. Forums, Support,
Social media, User research



Uncover
hypotheses

Uncover
patterns

Quantitative

e.g. Analytics



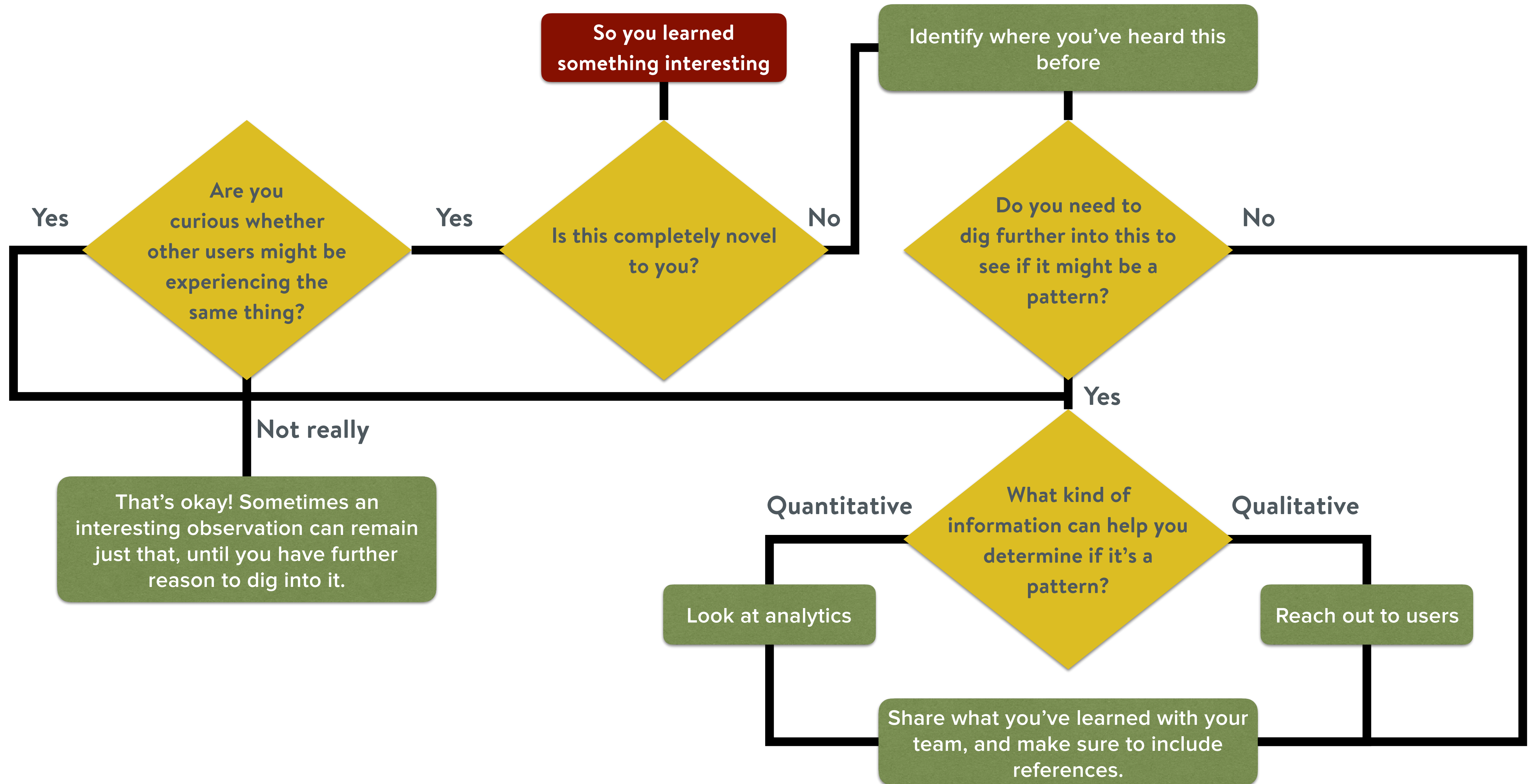
Tip #7:

SHARE THE INSIGHTS, NOT THE ANECDOTES





What happens after a store visit?



Tip #8:

CONSIDER THE IMPACT OF SMALL CHANGES



Consider the impact of quick wins vs. full releases

*“Now there is a **constant tweaking** of formats and systems. For the 'creatives' who work behind the scenes this might seem easy and inconsequential - **little incremental changes** in a constant quest for better efficiencies, or striving to make an interface seem cleaner or more intuitive blah blah - 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**, and some of them had been done away with and new ones added. Some things might work better, and some might not, and it might only take you a day or two to get used to the new system - and **you do get used to it**. Then in a couple of weeks it **all changes again** and on and on.”*

What's the tradeoff?

Tip #9:

DEVELOP EMPATHY FOR YOUR AUDIENCE TOO



ORDER STATUS RESEARCH ACTIVITY

CUSTOMER JOURNEY

Source: User 29 and User 32, 2023, when members of the Research Institute participated in a research activity. During this activity, participants documented their post-purchase journey. How the "Thank you" page for package delivery and receipt. The following stages were derived from their stories.

LEGEND

- Emotion
- Necessary step
- Ancillary step
- Content-related
- Layout/presentation-related
- Things to consider
- Things to avoid

STAGE 1: 'Thank you' page

- Positive information
 - e.g. delivery date, suggested products, order summary
- Confused reaction
 - e.g. 'The' and 'us'
- Receptive information
 - e.g. nothing offered beyond order summary
- Misplaced emphasis
 - e.g. additional email (photographical) calls to action

STAGE 2: Receipt in the process

- Happy
 - e.g. customer aware of their role in getting to the point (own parcel)
- Effective subject line
 - Facilitates future searches
- Useful actions
 - e.g. ability to download receipt
- Content and presentation
 - e.g. estimated delivery date was most prominent
- Receptive information
 - e.g. nothing beyond information provided during checkout process
- Unimpressed time
 - e.g. too long, overly friendly
- Basic content
 - e.g. too wordy, difficult to parse

STAGE 3: Content status

- Unimpressed information
 - e.g. additional delivery date easier to digest if you will receive your parcel in 3 days
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 4: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 5: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 6: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 7: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 8: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 9: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 10: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 11: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 12: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 13: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 14: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 15: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 16: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 17: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 18: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 19: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 20: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 21: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate

STAGE 22: Content status

- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g. order status, delivery date with time estimate
- Unimpressed information
 - e.g. order status, delivery date with time estimate
- Content status
 - e.g.

Why
“

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

Shopify Mobile survey

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

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



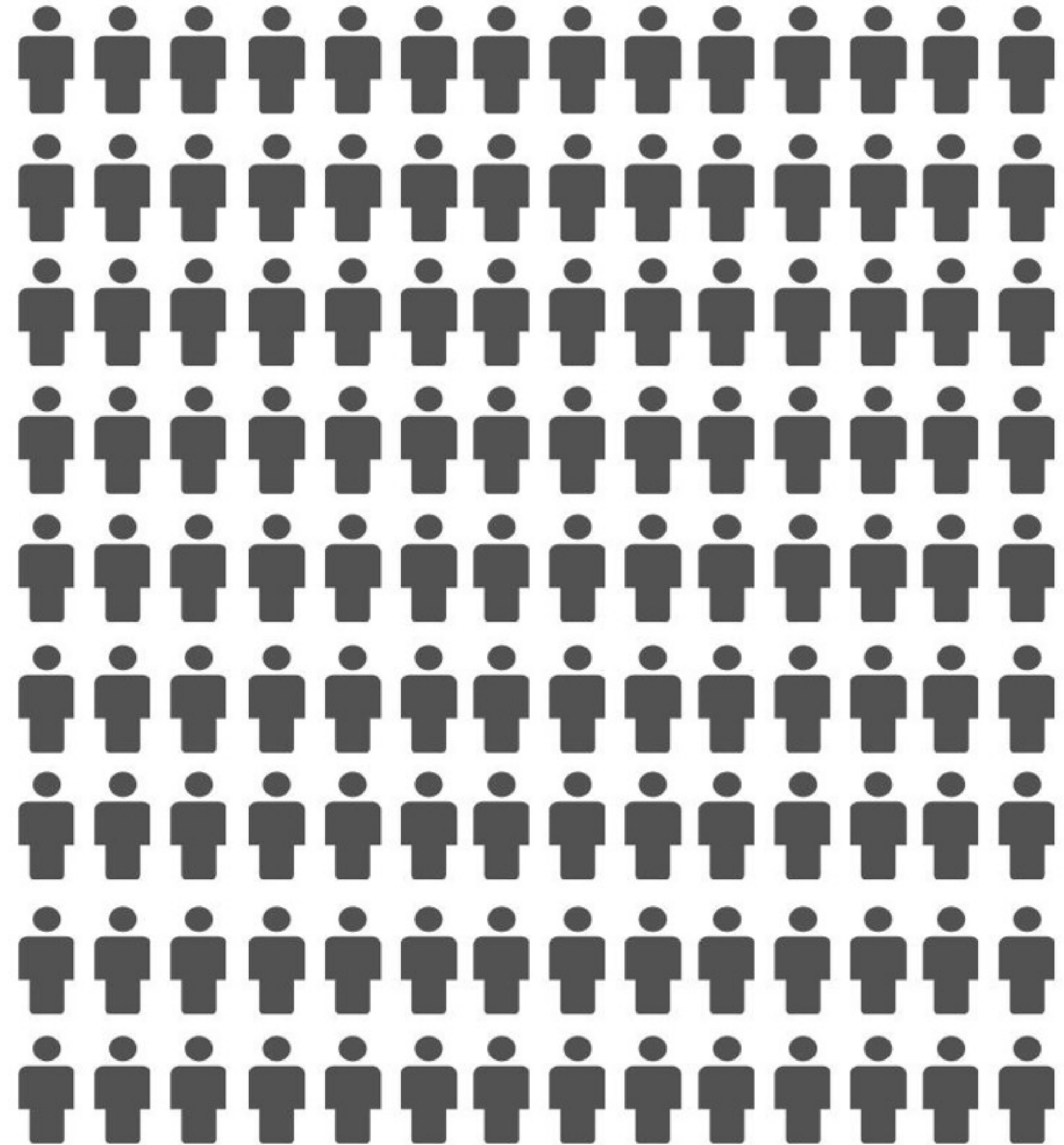


Tip #10:

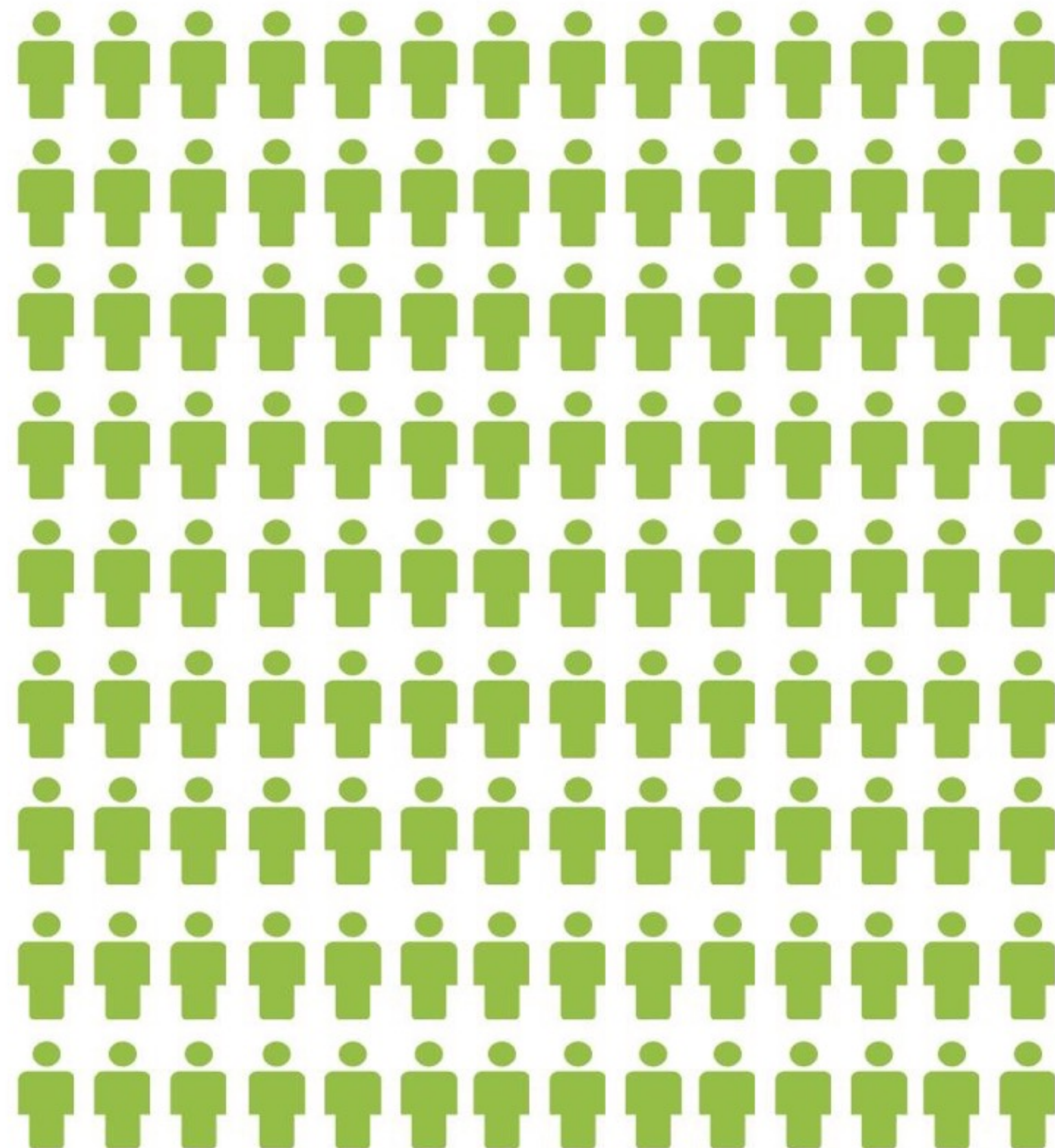
BE CONTAGIOUS



With one researcher
for every
140 employees...



**... we need everyone
to think like
a researcher.**



10 tips for adopting a research mindset

- #1: Accept that there is no “one-size-fits-all” method
- #2: Allow the user’s role to be fluid
- #3: Choose to be problem-oriented
- #4: Ask early, and ask often
- #5: Find information all around you
- #6: Tighten your feedback loop
- #7: Share the insights, not the anecdotes
- #8: Consider the impact of small changes
- #9: Develop empathy for your audience too
- #10: Be contagious



BEING A RESEARCHER 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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