

Leveraging context into resources:

How to take ownership of the UX problems we observe

Dalia El-Shimy

UX Research Lead at Shopify







Flashback to almost four
years ago...







[Cart](#) > [Customer information](#) > [Shipping method](#) > [Payment method](#) > [Review order](#)

Contact information

Already have an account? [Log in](#)

Email

☐ Keep me up to date on news and exclusive offers

Shipping address

First name

Last name

Address

Apt, PO Box, etc. (optional)

City

Country
Canada

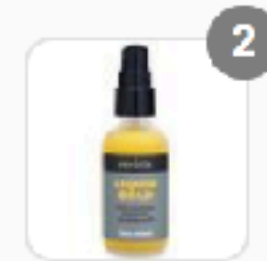
Province
Quebec

Postal code

Phone (optional)

[Return to cart](#)

[Continue to shipping method](#)



2

Liquid Gold

\$48.00

Gift card or discount code

Apply

Subtotal

\$48.00

Shipping

—

Total

USD **\$48.00**

Discussion Forums

I'm looking for...



Home > Discussion Forums > Shopify Discussion > New Feature Requests



TOPIC



New Feature Requests



[Cart](#) > [Customer information](#) > [Shipping method](#) > [Payment method](#) > [Review order](#)

Contact information

Already have an account? [Log in](#)

Email

☐ Keep me up to date on news and exclusive offers

Shipping address

First name

Last name

Address

Apt, PO Box, etc. (optional)

City

Country
Canada

Province
Quebec

Postal code

Phone (optional)

[Return to cart](#)

[Continue to shipping method](#)



2

Liquid Gold

\$48.00

Gift card or discount code

Apply

Subtotal

\$48.00

Shipping

—

Total

USD **\$48.00**



[Discounts] List of discount requests



File Edit View Insert Format Data Tools Add-ons Help

All changes saved in Drive



SHARE



100%

\$

%

.0

.00

123

Arial

10

B

I

~~S~~

A



fx

Source

	D	E	F	H	I	J	K	L
1	Source	Request	Code					
2	Feature Request Forum	Automatic discounts based on total spend in the cart	Automated discount for purchase above threshold					
3	Email response to recruitment	automated discounts	Automated discounts					
4	Nick Looijmans	Automatically generating one-time use discount codes	BOGO					
5	Email response to recruitment	BOGO	Buy X, get Y					
6	Nick Looijmans	better logic options (e.g. buy 4 tshirts, get the 5th free)	Buy X, get Y					
7	Feature Request Forum	Quantity Based Coupons: Would be also great to offer quantity based discounts such as Buy one get one free. Or buy one get one 50% off.	Buy X, get Y					
8	Alena Louguina	Custom promotions in abandoned cart emails based on the content	Custom promotion in abandoned cart					
9	Feature Request Forum	Discounts for product variants	Discount off specific product variants					
10	Feature Request Forum	setting up a discount code by sku, so on a product with multiple variants, you could select which variant you want to offer the discount code for.	Discount off specific variants					
11	Shopify Scripts Slack	discounting shipping rates (e.g. across-the-board \$X off)	Dollar amount off on shipping					
12	Nick Looijmans	Editing discount codes without having to delete them	Editing discount codes					
13	Feature Request Forum	- Ability to edit existing discount codes	Editing discount codes					
14	Feature Request Forum	Edit Discount: At this time, If I am not missing anything, we are unable to edit discount codes. So if we want to change anything or entered something wrong, we have to delete it and create another one.	Editing discount codes					
15	Feature Request Forum	Excluding sale items from discount codes	Excluding products					
16	Feature Request Forum	Excluding items from discount	Excluding products					
17	Feature Request Forum	Discount with X% Off on Orders Over \$Y, but excluding certain products	Excluding products					
18	Feature Request Forum	Excluding Selections: Excluding a brand or product. It would be very useful especially a lot of brands have MAP policy and they don't allow discounts.	Excluding products					



A team of 30+ people



But how?



Why do UX folks pick up
on this stuff?

We see things differently

- We spend more time with users
- We bridge the distance to the frontline
- We connect with humans, and not 'users'
- We examine the whole, not the silos
- We accumulate more knowledge than we intend to



Organizations are often
structured based on
products and teams...



... but people's
experiences are not.



So what happens then?



Let's talk about 'loose threads'.

This is Dylan.

He worries about
loose threads.



Loose threads


- Suppose you have a sweater that looks great... from afar.
- When you get up close though, you see it has some loose threads.
- You want to tug at a thread to see how far it goes.
- Maybe it's nothing...
- ... but maybe the whole thing might unravel when you tug.

If you want to destroy my sweater...



... pull this thread as I walk away.

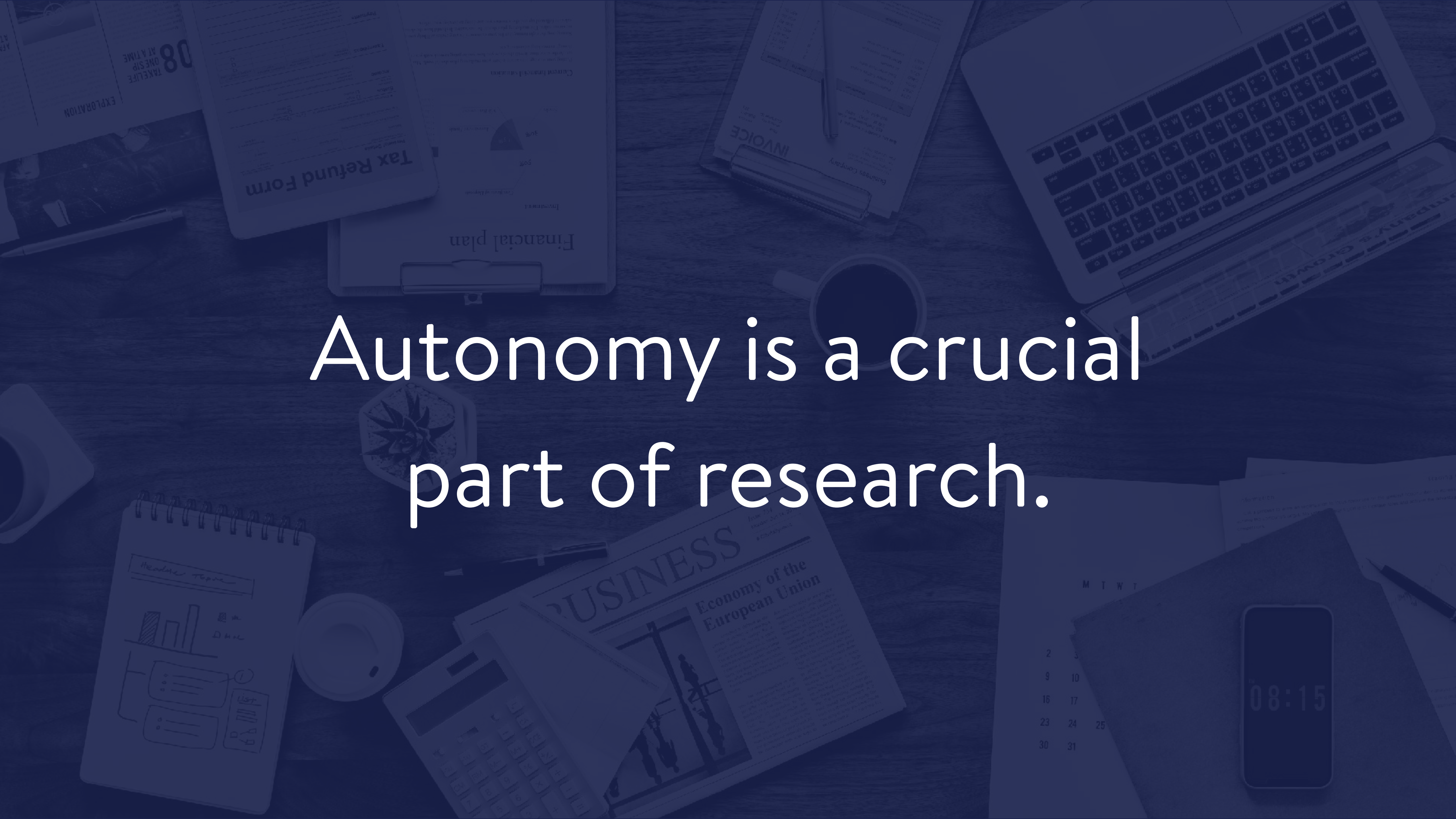




Why should we tug at loose threads?



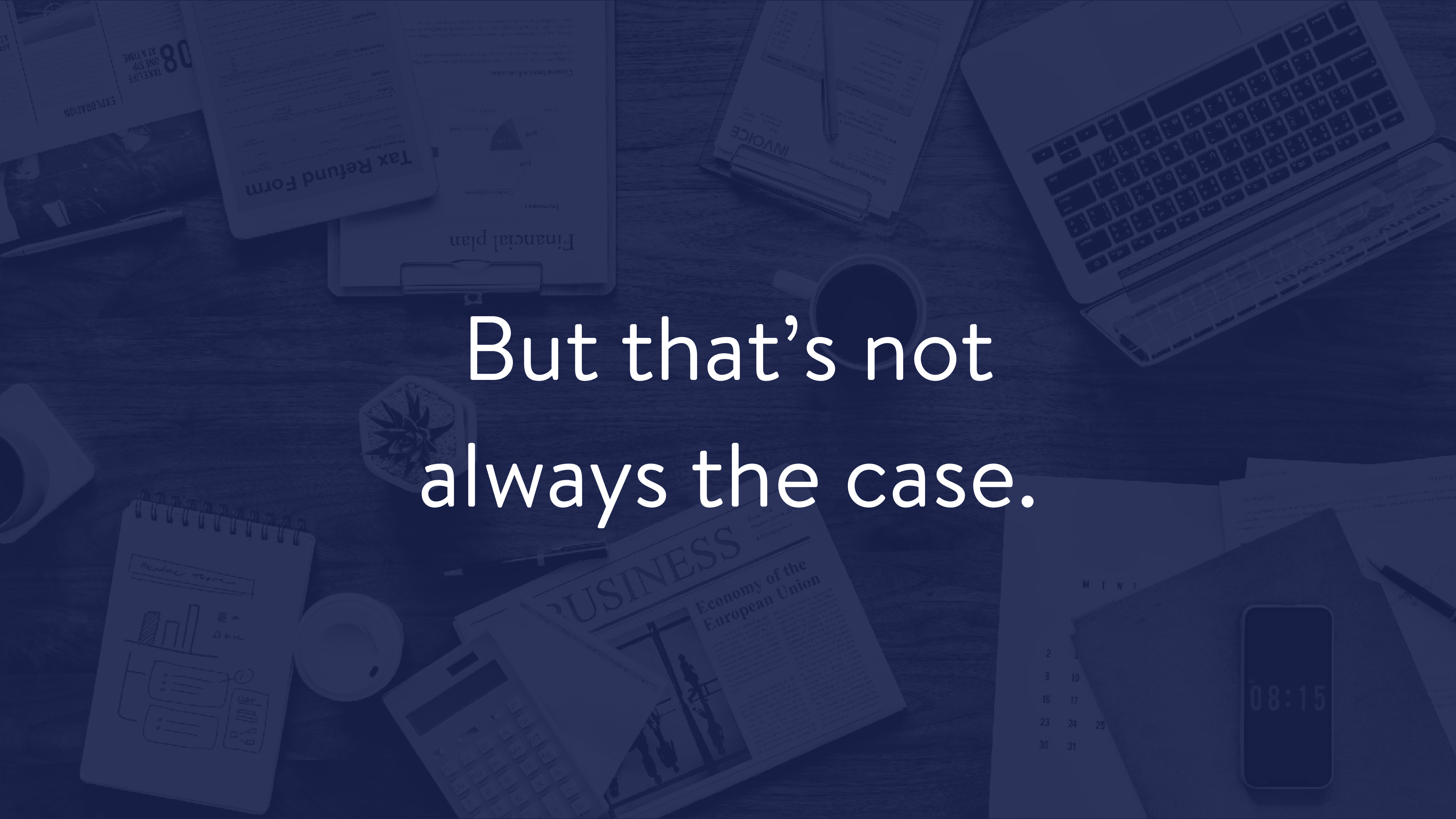
And who's most likely to
tug at them?



Autonomy is a crucial
part of research.

Think of it like academic tenure


- Researchers try to be one step ahead of the rest of the team
- Researchers try to identify the questions no one's thinking about yet
- Researchers should have the space and freedom to do so
- Researchers should feel comfortable tugging at loose threads



But that's not
always the case.

Why not?

- Sometimes, it's the team or organization... but it's also the researcher
- There's a fear of uncertainty
- There's a fear of failure
- There's a fear of detaching from the team
- And, we're not well-trained in recognizing the impact of that work



How can we become
comfortable with that
ambiguity?

Getting comfortable with loose threads

- There's always *something* to be learned
- Look for similar examples and identify their impact
- Find support in others
- Help the rest of your team understand why you're doing this



So you're ready to tug on
the thread. Now what?



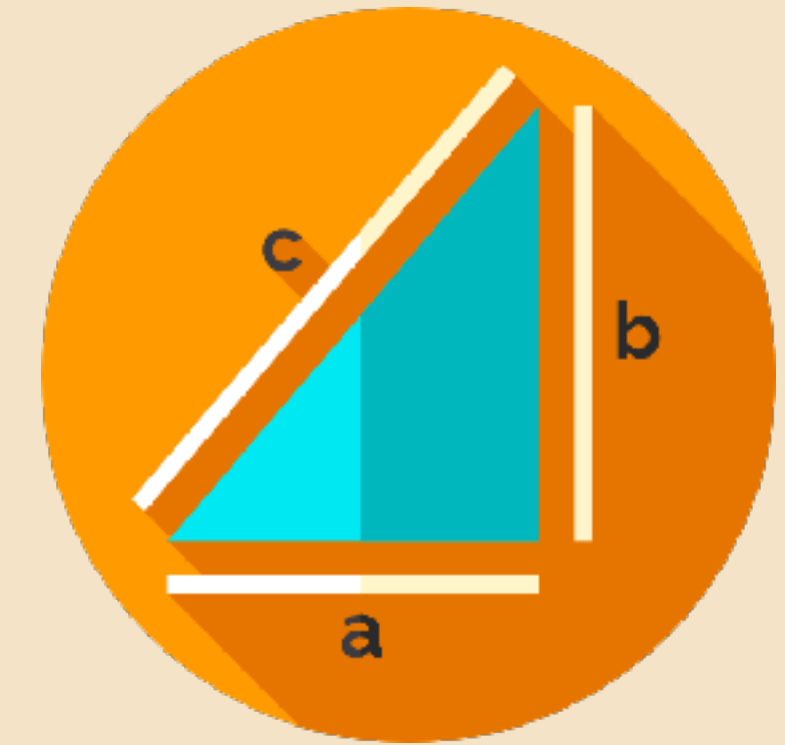
You need a strategy.



**Identify your
true scope**



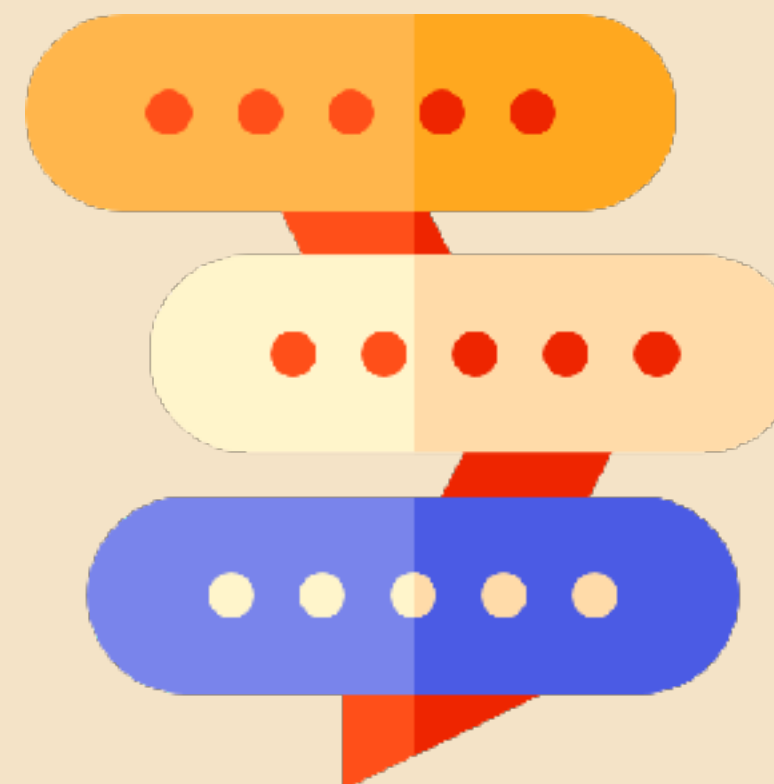
**Note what
stands out**



**Triangulate
your sources**



**Understand
the metrics**



**Build your
argument**

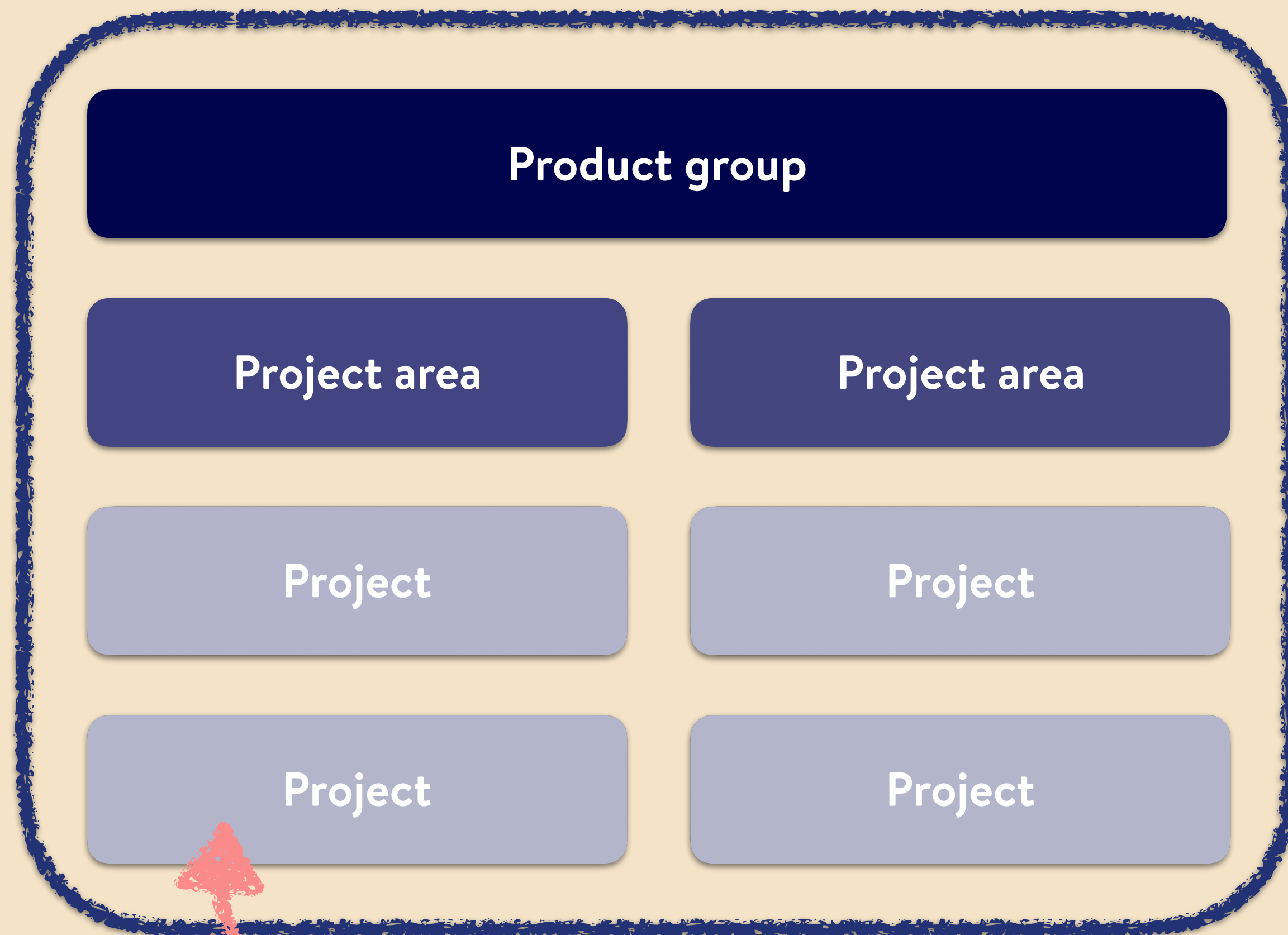


**Target your
audience**

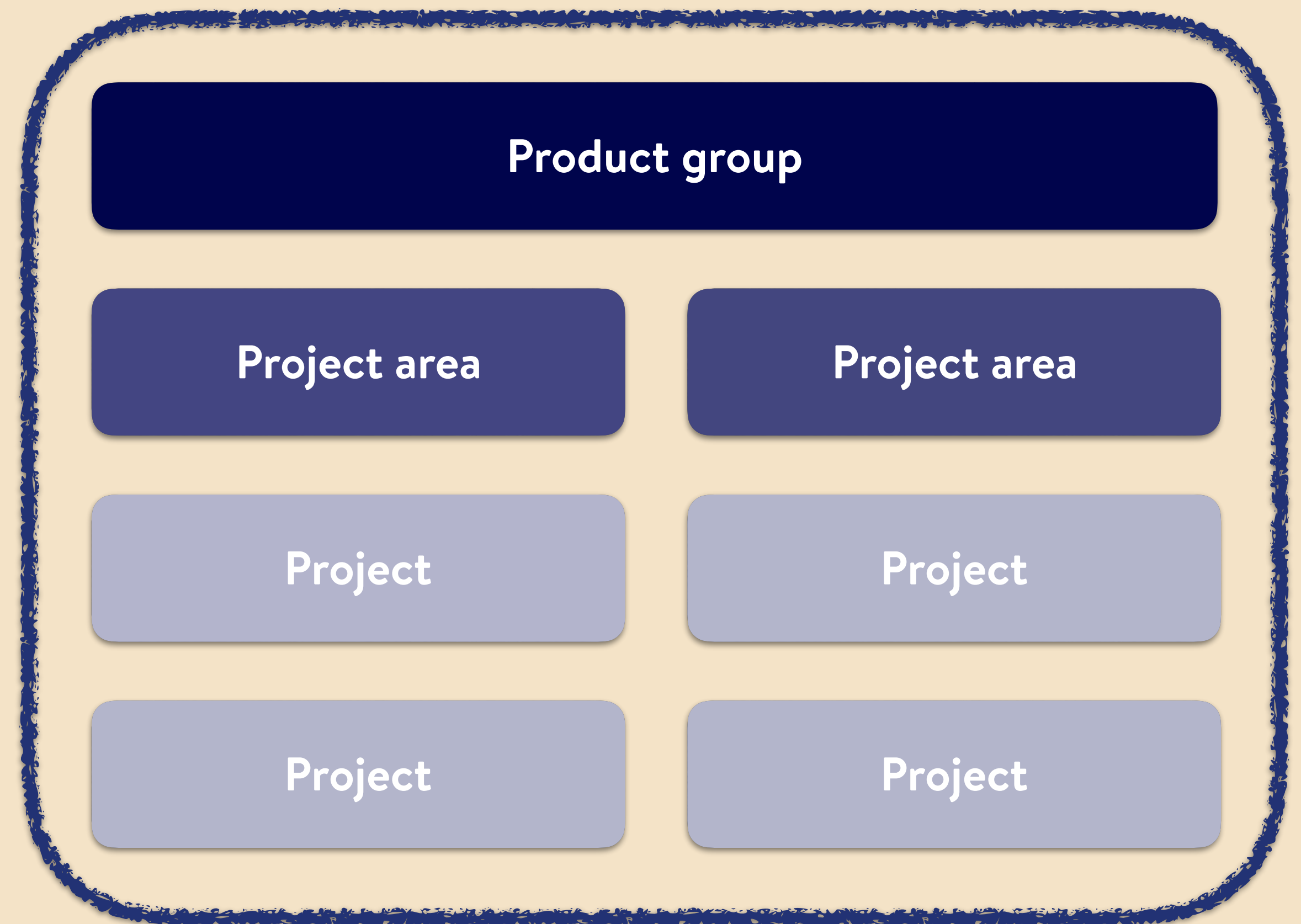


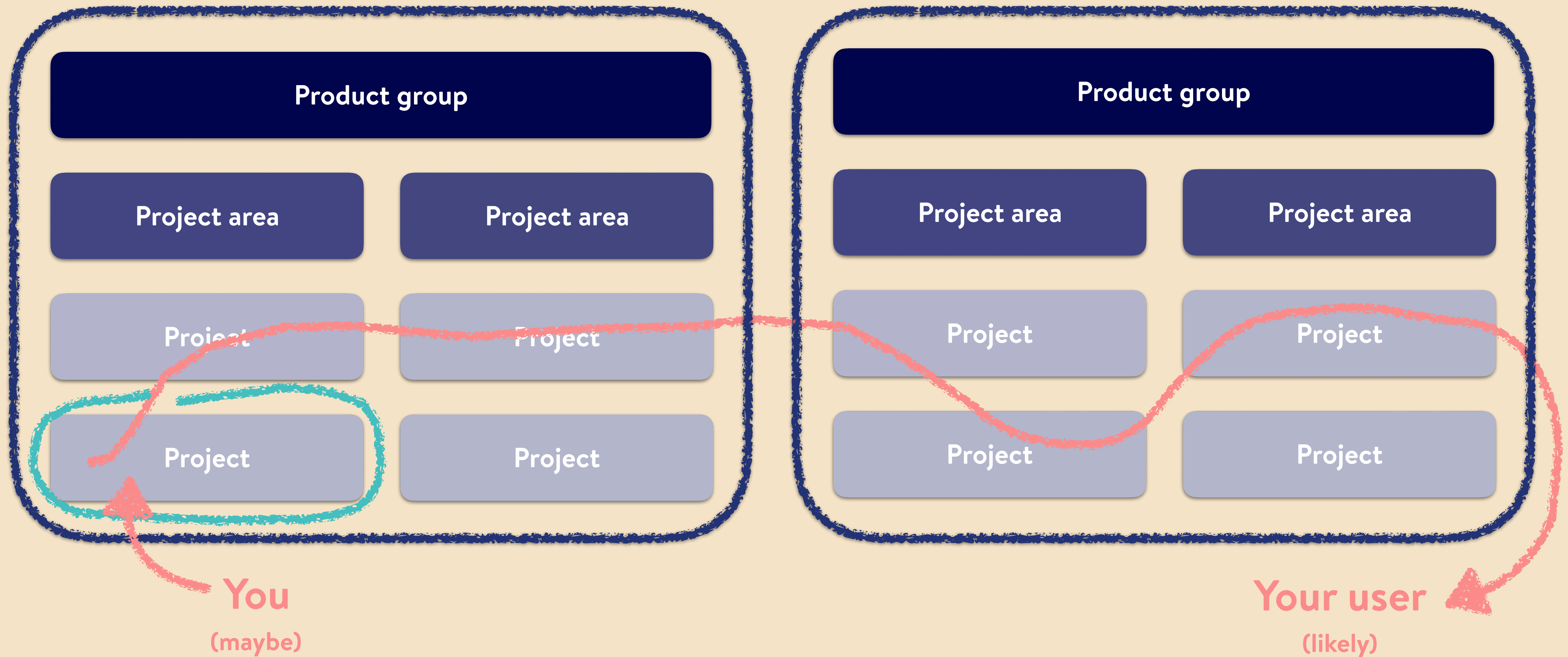
STEP 1:

Identify your true scope



You
(maybe)





What's *your true scope*?

- Look at the broader journey
- Reframe questions to reflect that
- Expand outline of ownership



STEP 2:

Note what stands out


Research comes in many forms

- There's primary research...
- ... then there's all the information at our fingertips.

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

This post is outdated

Hi,

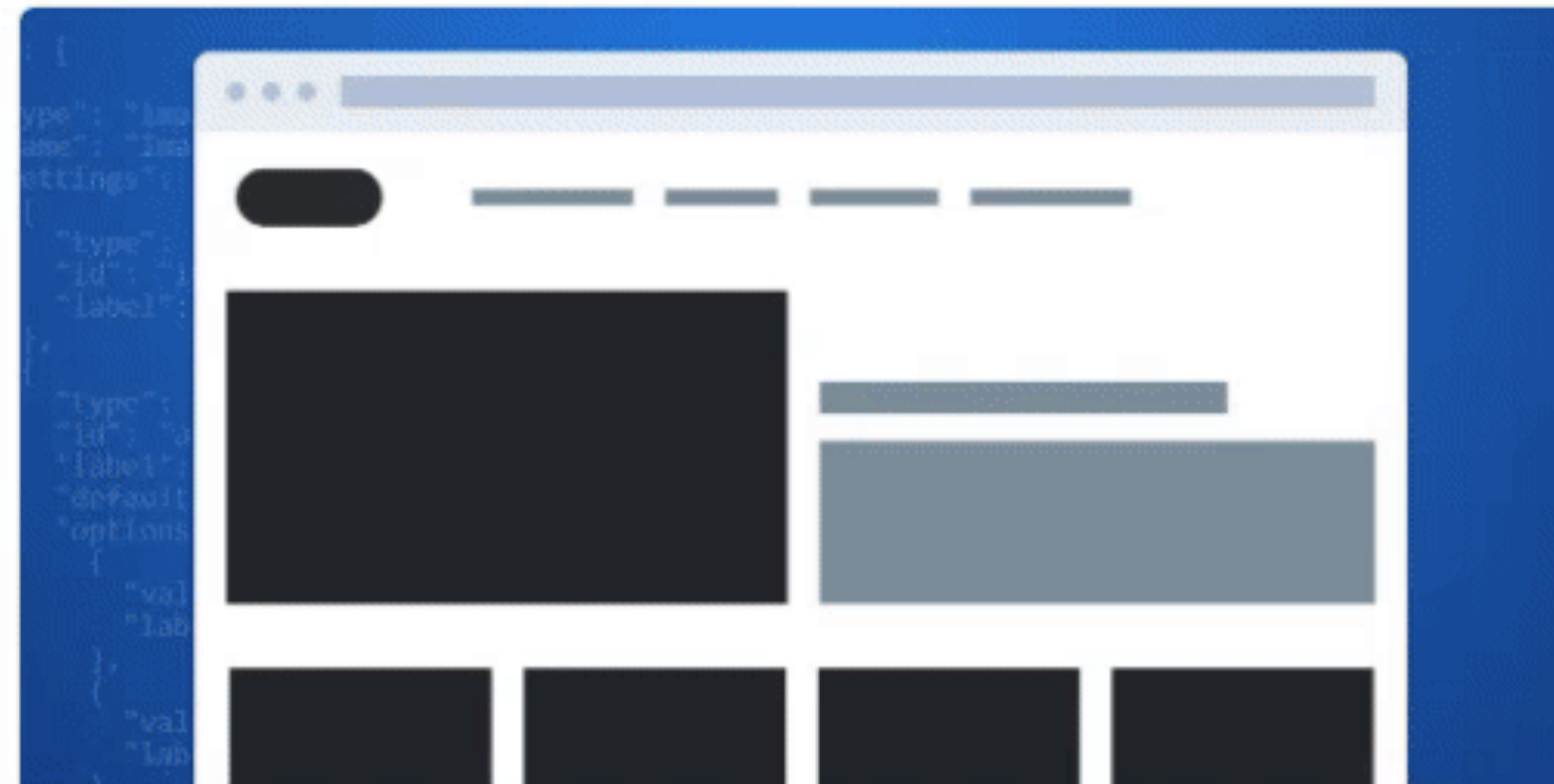
I want to limit this particular discount for 1 time use per customer. Can this be done?

shopify sections

[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



storetasker

The #1 Shopify Seller Community

since 2015

in collaboration with

OUT
OF THE
SANDBOX



Pixel Union

Boarded ▾

✓ Hail-shots

➔ Blabber t' yer mates

... More

Scrawl Message | Photo/Video | Live Video | More



Scrawl somethin'



Portrait/Bewi...



Get Together



Be feelin' or ...



Get started on units

1 Unit · 1 Post · 11 Comments See units



Admins can see your progress on units and posts in this group



GROUP BY



Storetasker - Shopify Experts

37,213 like this

Use a contraption on yer pocket

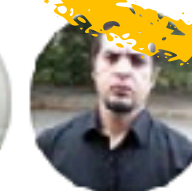
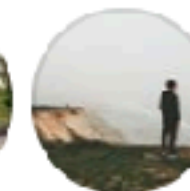
ADD SCALLYWAGS

+ e-bottle



CREWMATES

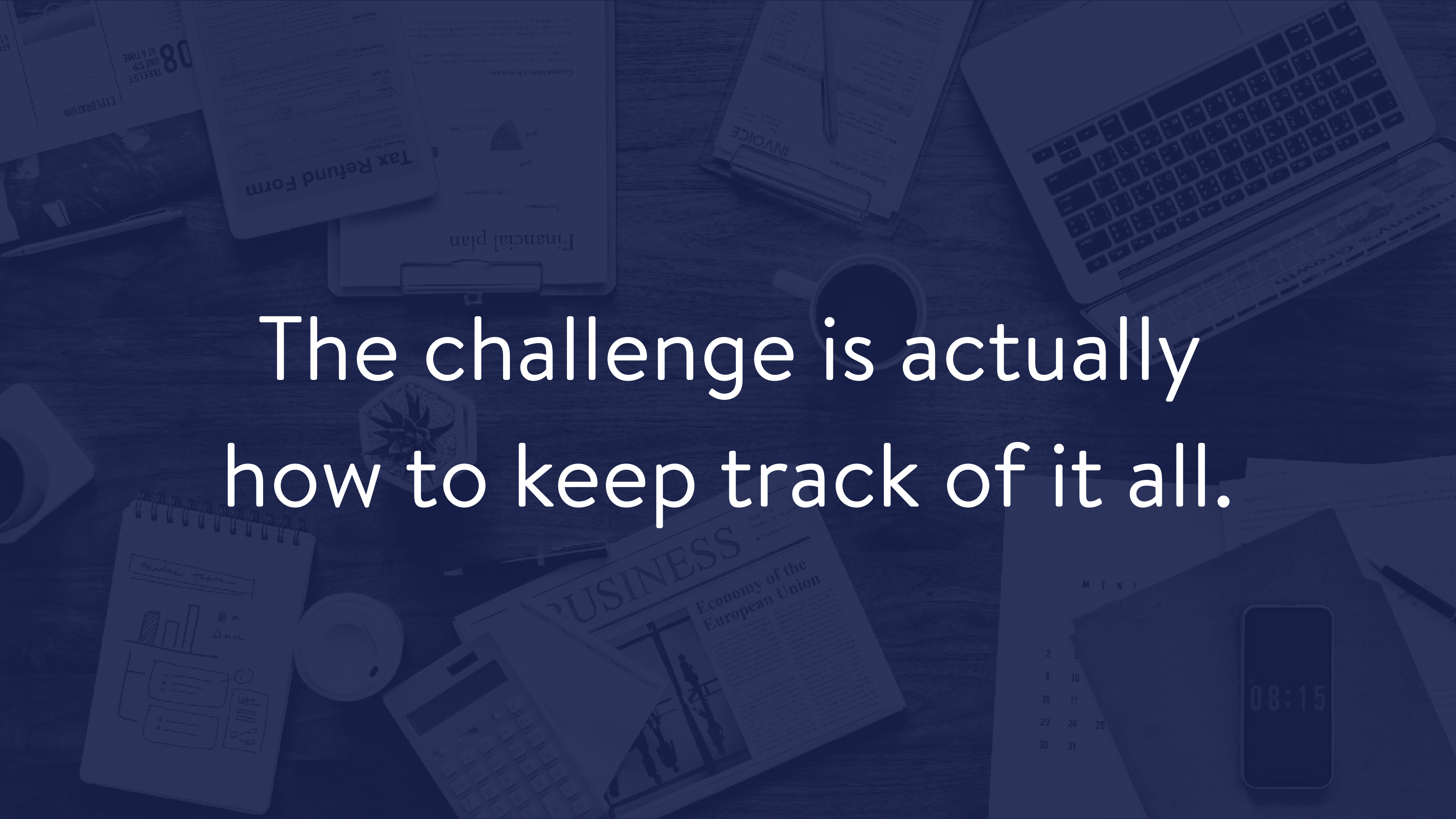
82,444 Members



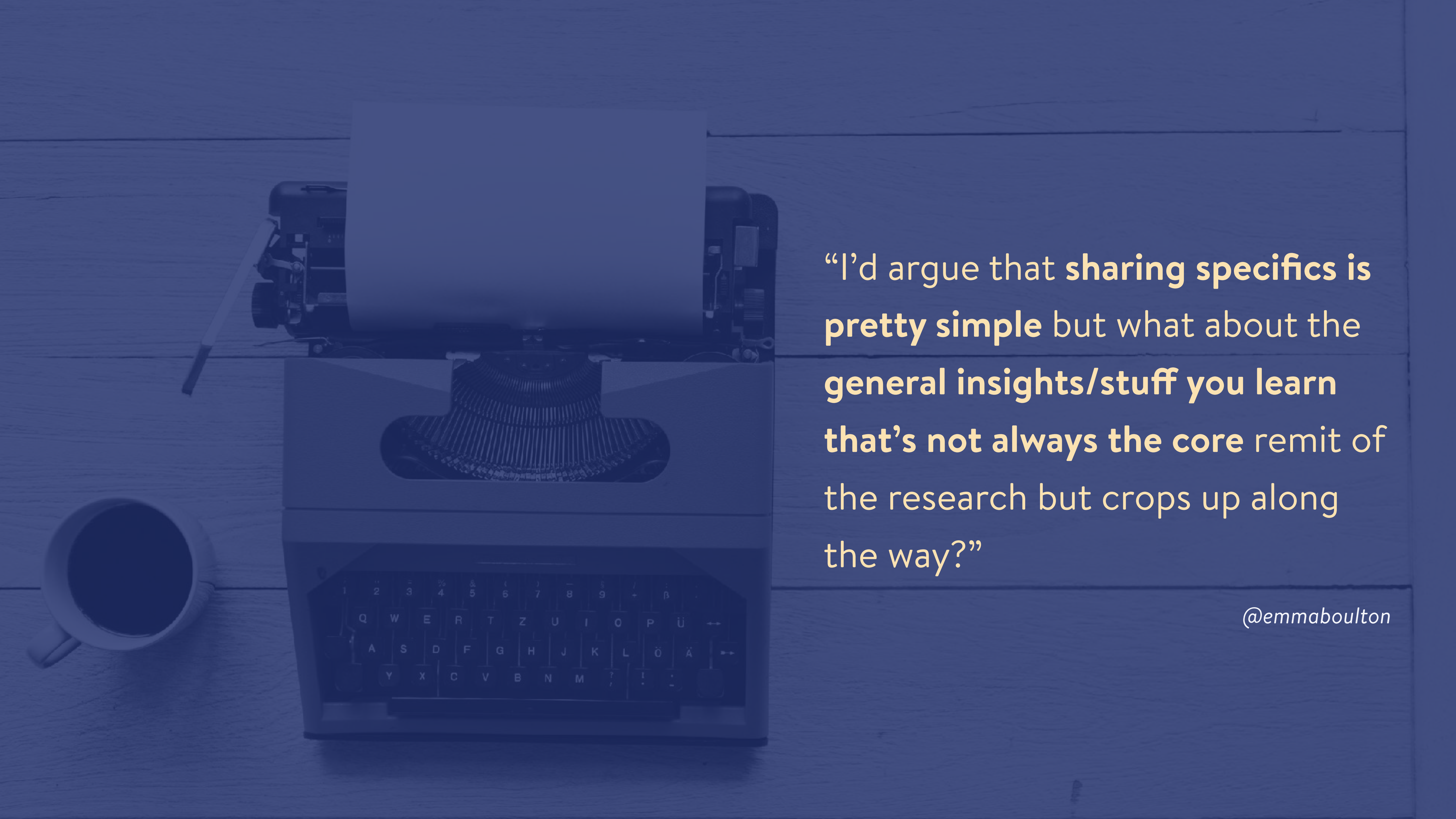
SUGGESTED MEMBERS

Hide



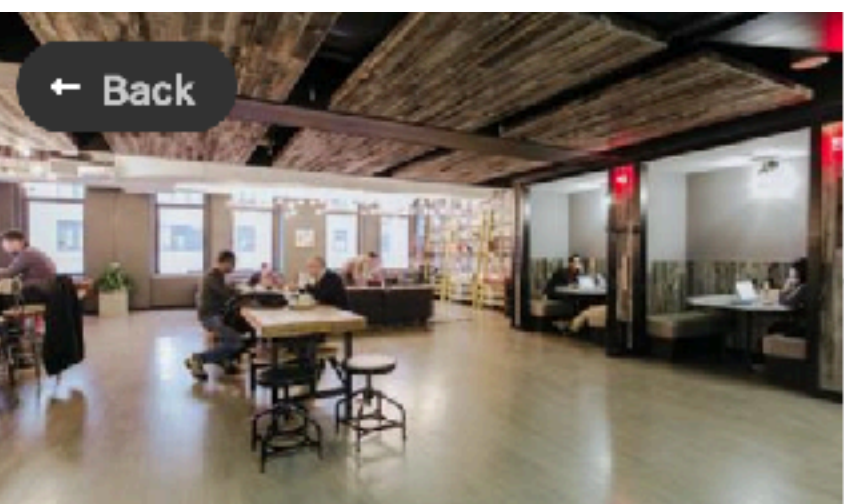


The challenge is actually
how to keep track of it all.



“I’d argue that **sharing specifics is pretty simple** but what about the **general insights/stuff you learn that’s not always the core** remit of the research but crops up along the way?”

@emmaboulton



Polaris UX Nuggets

Nuggets

By Vector/Magnitude

Main View

Samples

Main View

Insights

Main View

Provocations

Gallery

Main View

Journeys

Copy base

<div>Hide fieldsFilterGrouped by 2 fieldsSort...</div>					
Observation	Observation directory	Timestamp	Experience vector	Magn	
EXPERIENCE VECTOR					
Positive	Count 4				
MAGNITUDE					
High	2				
1	Enjoys extra hour in day, b/c increased productivity vs. Terran workers	https://www.youtube.com/watch?v=LOLB87t&...	00:07:27-00:08:25	Positive	High
2	Mars is actually a fine place to raise kids (contrary to Elton John)	https://soundcloud.com/weworkmars-ux-inter...	00:03:15-00:03:50	Positive	High
MAGNITUDE					
Medium	2				
3	View of Elysium Mons from conference room 8 is stunning	https://www.youtube.com/watch?v=HFDS74h...	00:03:48-00:05:12	Positive	Med
4	Can jump to second floor without using stairs b/c of low gravity	https://www.youtube.com/watch?v=LOLB87t&...	00:08:26-00:09:00	Positive	Med
EXPERIENCE VECTOR					
Neutral	Count 2				
MAGNITUDE					
High	1				
5	Member moving to Europa because "Mars is old news now"	https://www.youtube.com/watch?v=HFDS74h...	00:04:53-00:06:43	Neutral	High
MAGNITUDE					
Low	1				
6	Kombucha on tap made with hydroponic tea tastes funny	https://mail.google.com/mail/u/1/157e4221e31...	00:02:11-00:02:56	Neutral	Low
EXPERIENCE VECTOR					
Negative	Count 5				
11 records					

Create frustration

Title

Summarize problem, using important keywords

Problem

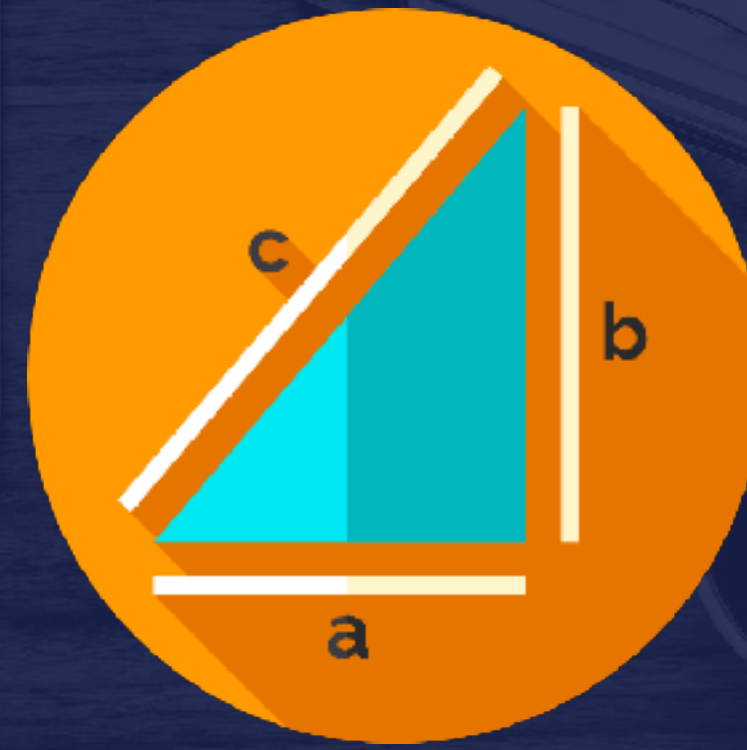
Describe the underlying problem and how it impacts merchants

Use cases

e.g. type(s) of merchants affected, and how they'd use or benefit from a solution


Workaround(s)

Anything merchants can do now to avoid or lessen the problem




STEP 3:

Triangulate your sources

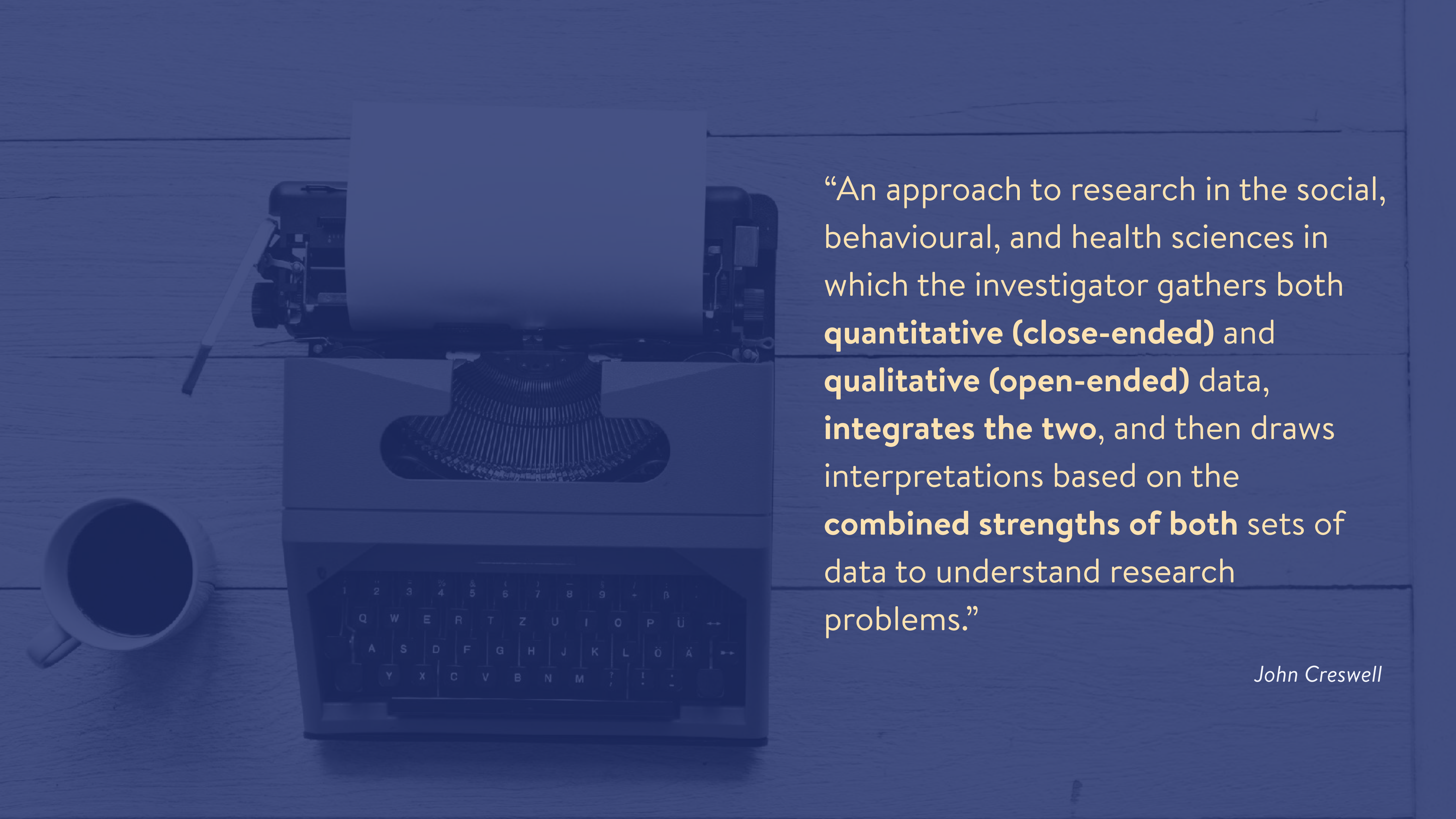
A vintage typewriter with a sheet of paper and a cup of coffee on a wooden desk. The typewriter is a light-colored, possibly white or cream, with a dark keyboard. A sheet of paper is fed into the carriage. To the left of the typewriter is a white cup filled with a dark liquid, likely coffee. The background is a wooden surface with horizontal planks.

“When approaching any problem,
you benefit from **multiple
perspectives**, and where possible,
we try to combine **different
research methods** to learn from
different viewpoints.”

@Fjord

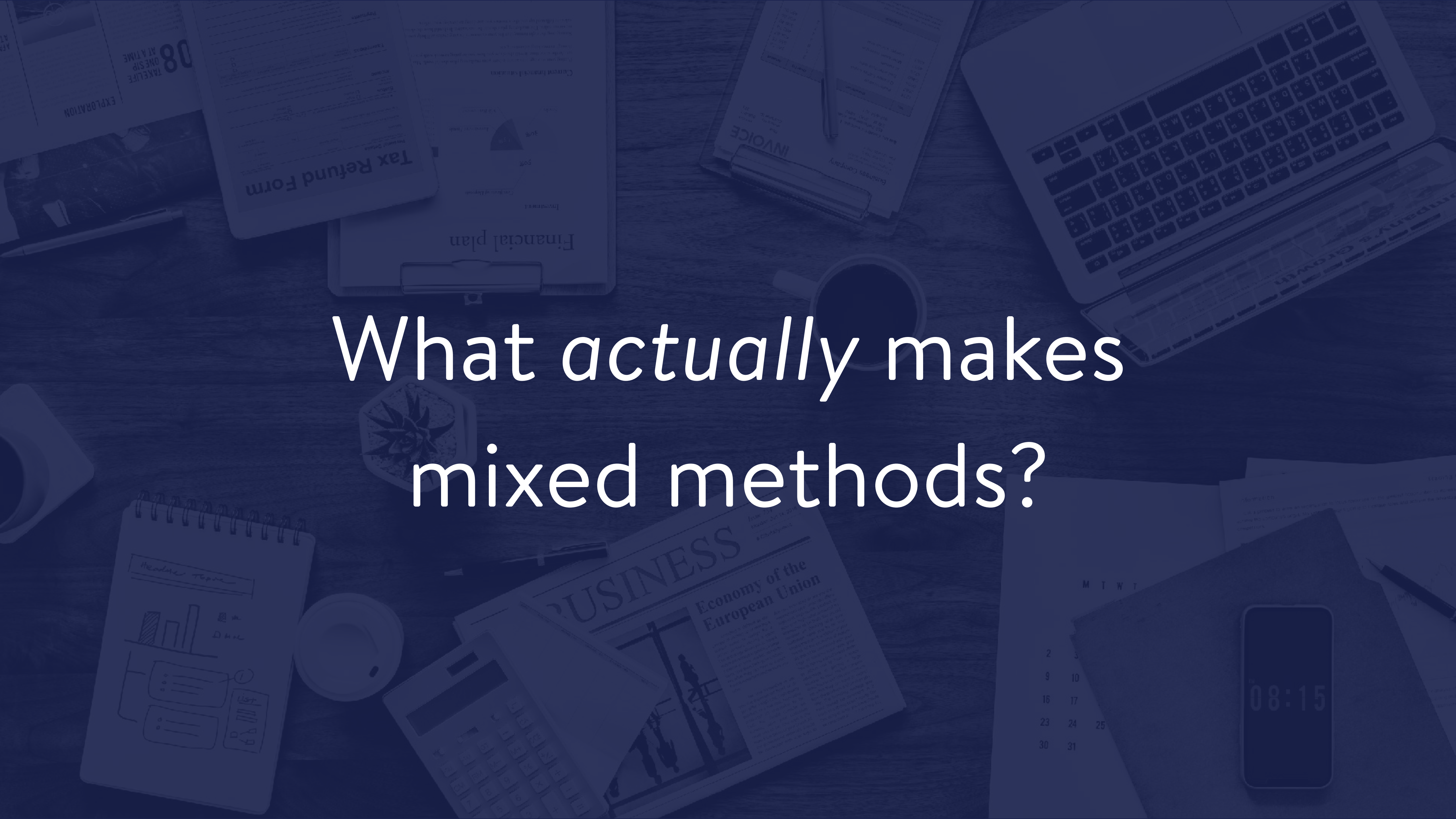


This is where mixed
methods research comes
in handy.




“An approach to research in the social, behavioural, and health sciences in which the investigator gathers both **quantitative (close-ended)** 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



What *actually* makes mixed methods?

A vintage typewriter with a sheet of paper in the carriage and a white mug filled with coffee on a wooden desk.

“An approach to research in the social, behavioural, and health sciences in which the investigator gathers both **quantitative (close-ended)** 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

Strengths

Weaknesses

Qualitative

Provides detailed perspectives
Captures the voices of the participants
Captures complex phenomena
Adapts to context
Is based on the views of the participants,
not the researcher
Appeals to people's enjoyment of stories

Is time-intensive when it comes to data
collection and analysis
Studies few people
Has limited generalizability
Is subject to the researcher's biases

Quantitative

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
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

Discover patterns
for large numbers
of people

Enrich them with
details and context



Exploratory sequential design

Capture the stories
of few

Draw conclusions
for large samples



So leverage the strengths of each method...



Voices, stories,
complex phenomena,
details



Objectivity, efficiency
statistical trends,
relationships between data


... to go from anecdote to an insight





STEP 4:

Understand the metrics

A vintage typewriter with a sheet of paper in the carriage and a cup of coffee on a wooden desk. The typewriter is dark-colored with a light-colored keyboard. The cup is white with a dark rim. The background is a light-colored wooden surface.

“Uncover the **important business metrics**. Hint: “important business metrics” usually include a currency sign, whether it's about making more money or reducing costs.”

userfocus.co.uk: “How to spend your first month in a UX research role”

What is important to your company?



Gross merchandising value
Average order value
Monthly recurring revenue
Lifetime value



Daily/monthly active users
Churn
~~Net promoter score~~



STEP 4b:

Quantify the impact

A few things to consider

- Does this problem impact support?
- Does this problem impact conversion?
- Does this problem impact retention?



STEP 5:

Build your argument



Dylan Blanchard

I like pizza 🍕 and I try to understand humans. UX Researcher @Shopify.

Mar 27 · 5 min read

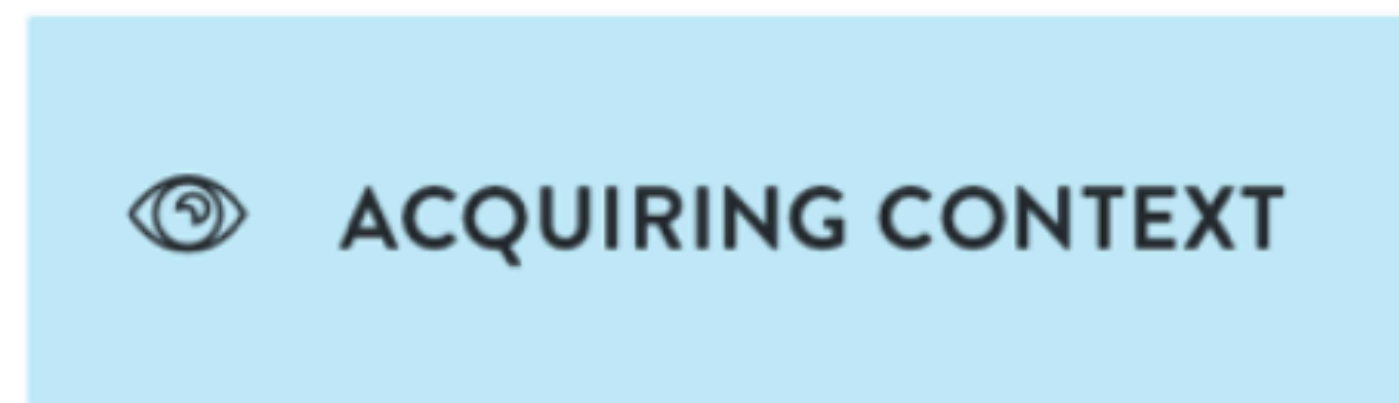
The Two Sides of Research

SHARE

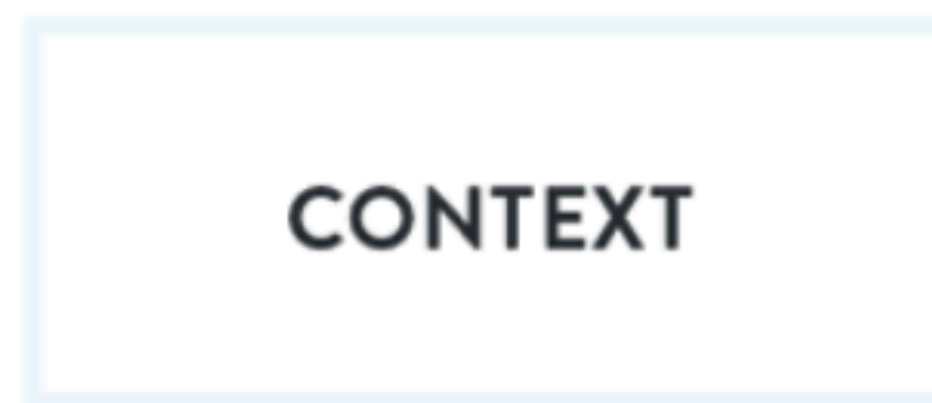


36





UNDERSTANDING PROBLEMS




GETTING OTHERS TO CARE AND FOLLOW
THROUGH WITH ACTION








This requires convincing,
and convincing requires
building valid arguments.

So what's an argument?



logic



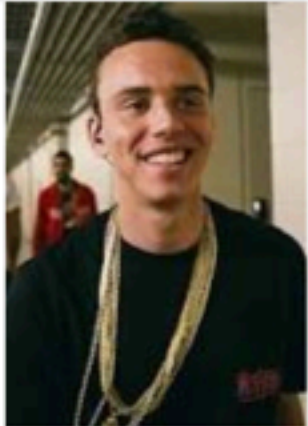



All Images Videos News Maps More Settings Tools

About 461,000,000 results (0.62 seconds)

Logic (musician) - Wikipedia
[https://en.wikipedia.org/wiki/Logic_\(musician\)](https://en.wikipedia.org/wiki/Logic_(musician)) ▼
Sir Robert Bryson Hall II (born January 22, 1990), known by his stage name **Logic**, is an American rapper, singer, songwriter, and record producer. Raised in ...
Other names: Young Sinatra **Labels:** Visionary Music; Def Jam; Elysium;
Origin: Gaithersburg, Maryland, U.S **Years active:** 2009–present
Logic discography · Everybody (Logic album) · Bobby Tarantino II · Under Pressure

Logic
American rapper

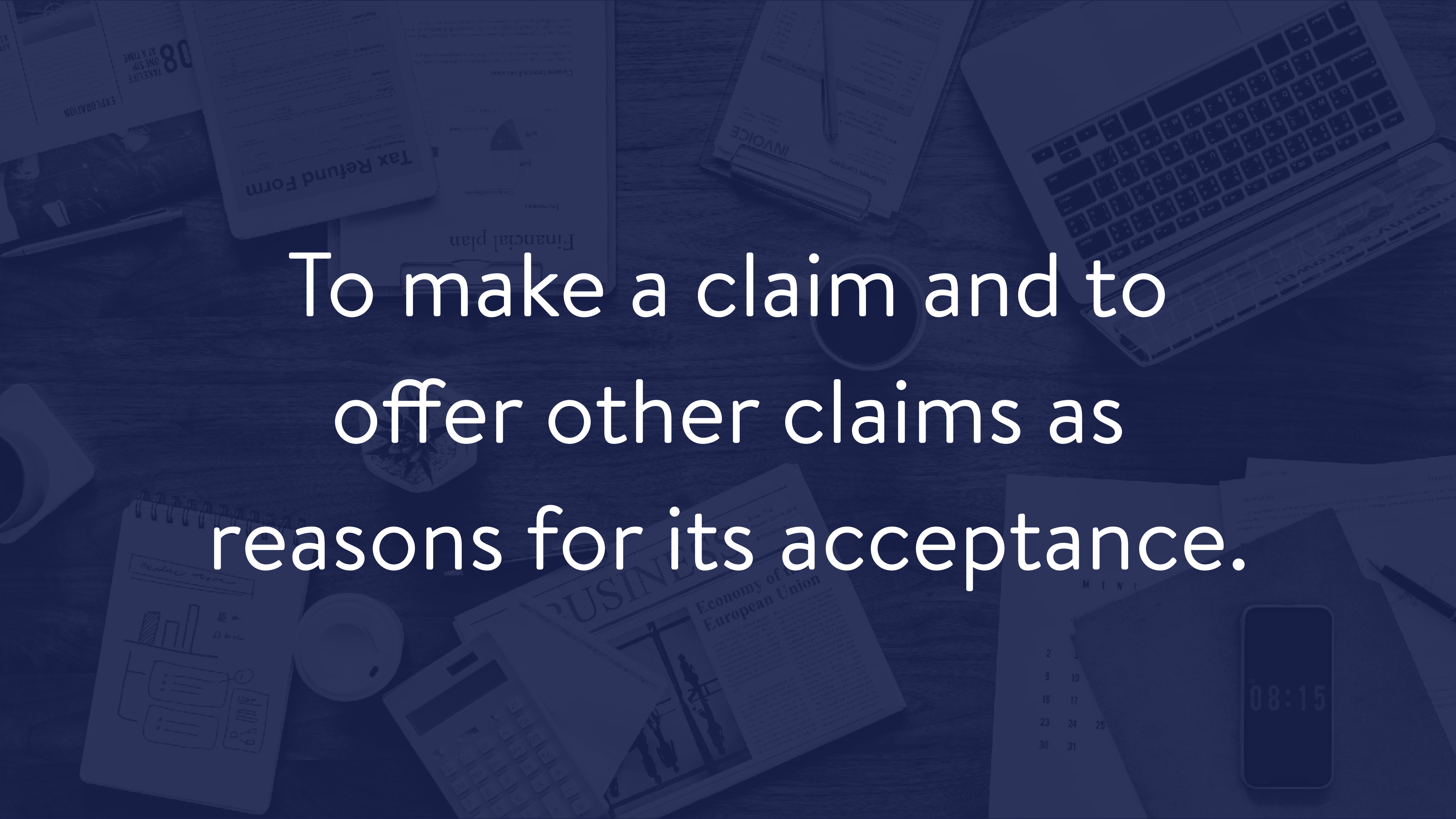


An argument

“Being able to offer a variety of discounts and promotions is an important aspect of running a commerce business. If we don’t offer features that can support this adequately, our merchants will leave our platform and go to our competitors. We should therefore support more robust discount functionality on our platform.”

Not an argument

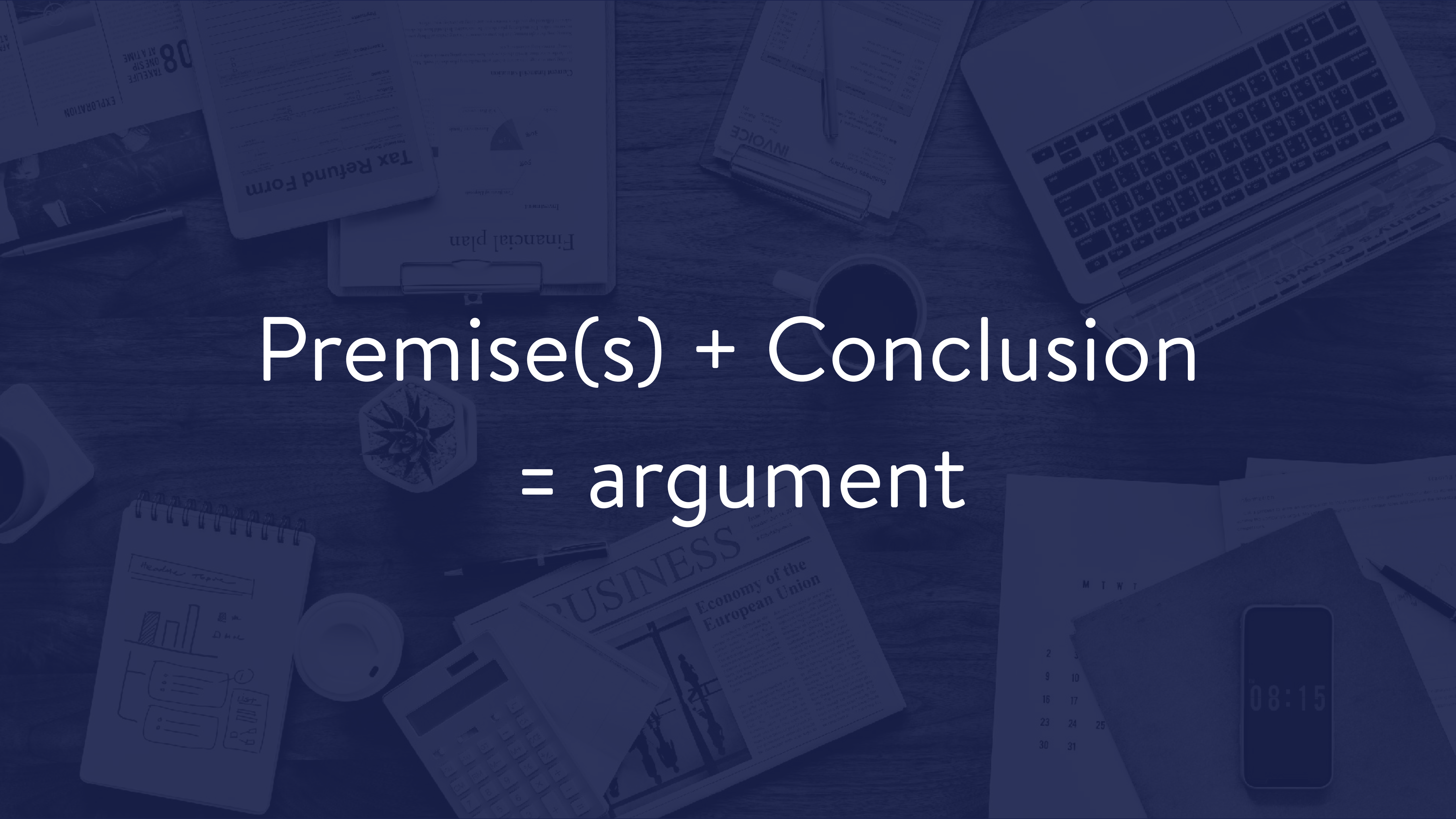
“Some people start a business because they’re looking for independence, while others might want to make a bit of money on the side. Others yet do it because they have ideas they really believe in. It can be a wonderful journey of growth and inspiration.”



To make a claim and to
offer other claims as
reasons for its acceptance.

Some helpful definitions

- **Premise:** A claim you put forward as a reason behind something you want to prove
- **Conclusion:** The claim you're trying to prove through the reasons you're offering



Premise(s) + Conclusion
= argument

Back to our example

Premise 1: Being able to offer a variety of discounts and promotions is an important aspect of running a commerce business.

Premise 2: If we don't offer features that can support this adequately, our merchants will leave our platform and go to our competitors.

Conclusion: We should therefore support more robust discount functionality on our platform.

Inference

Premise 1: Being able to offer a variety of discounts and promotions is an important aspect of running a commerce business.

Premise 2: If we don't offer features that can support this adequately, our merchants will leave our platform and go to our competitors.



Inference is the move
from premise(s) to conclusion

Conclusion: We should therefore support more robust discount functionality on our platform.

About “truth” and “validity”

- The word “valid” has a technical use in logic
- A **valid** argument is one in which there is **no possible way for the premises to be true, and the conclusions to be false at the same time.**
- If all of the premises are true, the conclusion would have to be true.
- An **invalid argument** is one where the **truth of the premises does not guarantee the truth of the conclusions.**



Some valid argument forms

A valid argument

If Dalia eats ice cream, then Dalia is happy.

Dalia ate ice cream.

Dalia is happy.

If P, then Q

P

Q

Another valid argument

If Dalia eats ice cream, then Dalia is happy.

Dalia is not happy.

Dalia did not eat ice cream.

If P, then Q

Not Q

Not P



Some *invalid* argument forms

An invalid argument

If Dalia eats ice cream, then Dalia is happy.

Dalia did not eat ice cream.

Dalia is not happy.

If P, then Q

Not P

Not Q

Another invalid argument

If Dalia eats ice cream, then Dalia is happy.

Dalia is happy.

Dalia ate ice cream.

If P, then Q

Q

P



We talked about validity...
But what about “truth”?



Research and data!

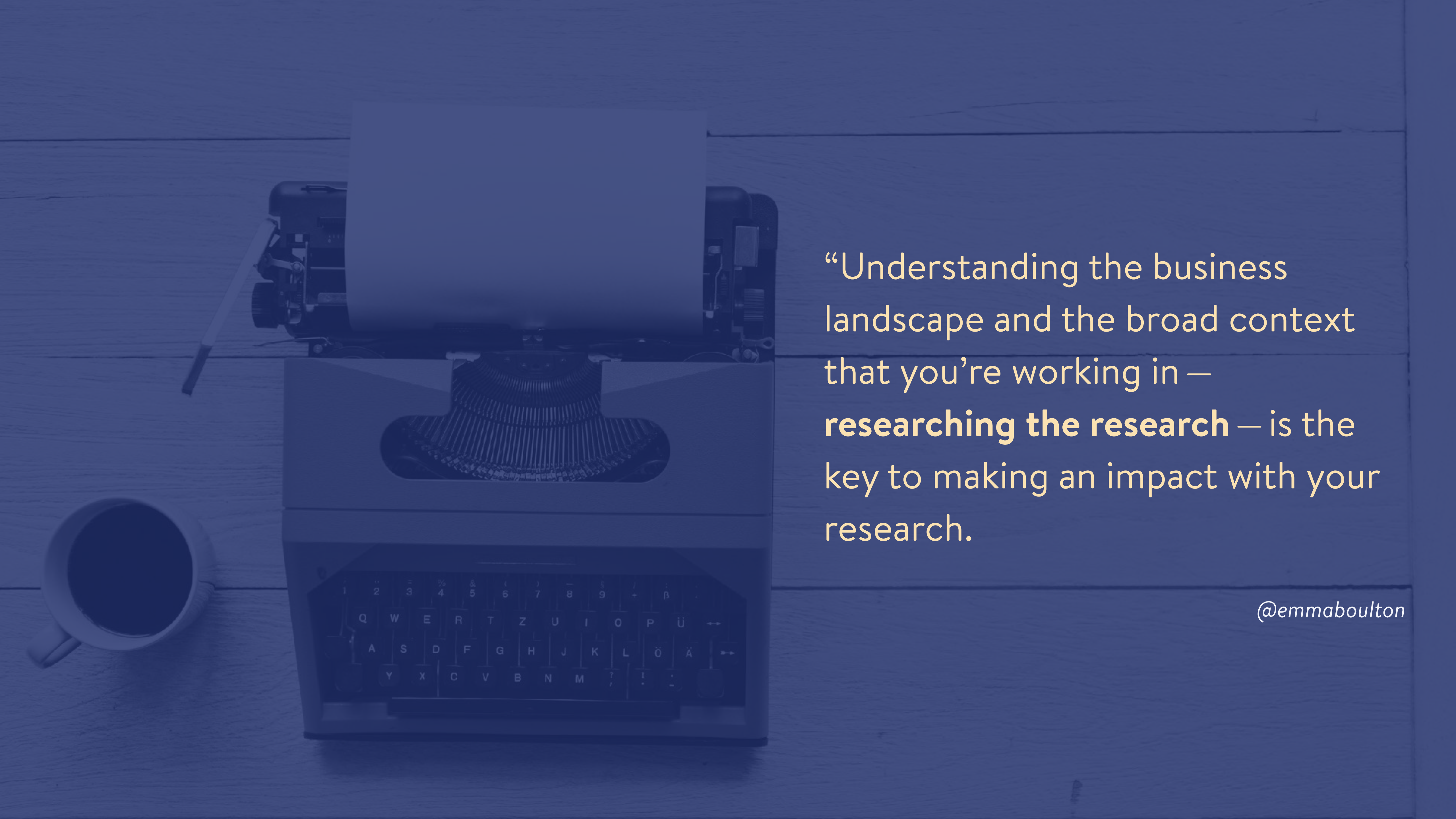
Building arguments is an invaluable skill

- The foundation of philosophy, mathematics, law, programming
- A way of framing your work
- A tool to offer feedback
- **The power to convince people**



STEP 6:

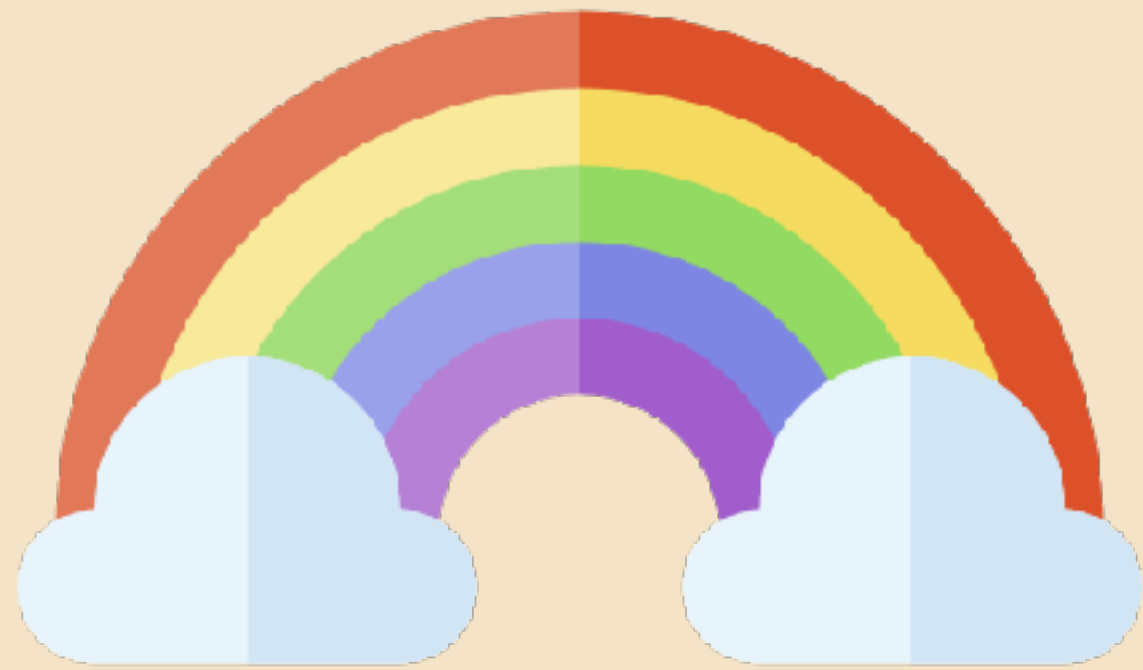
Target your audience



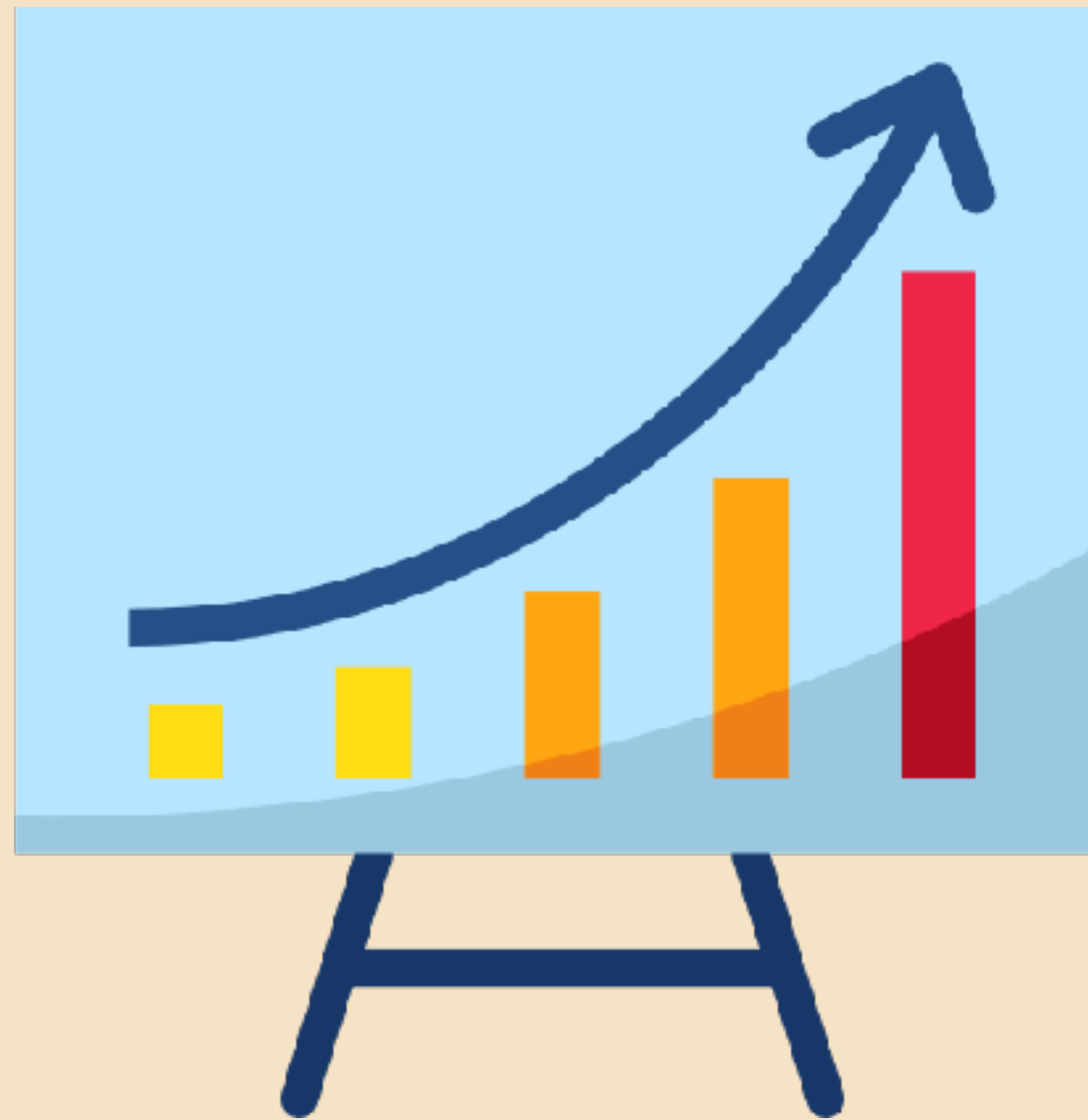
“Understanding the business landscape and the broad context that you’re working in — **researching the research** — is the key to making an impact with your research.

@emmaboulton

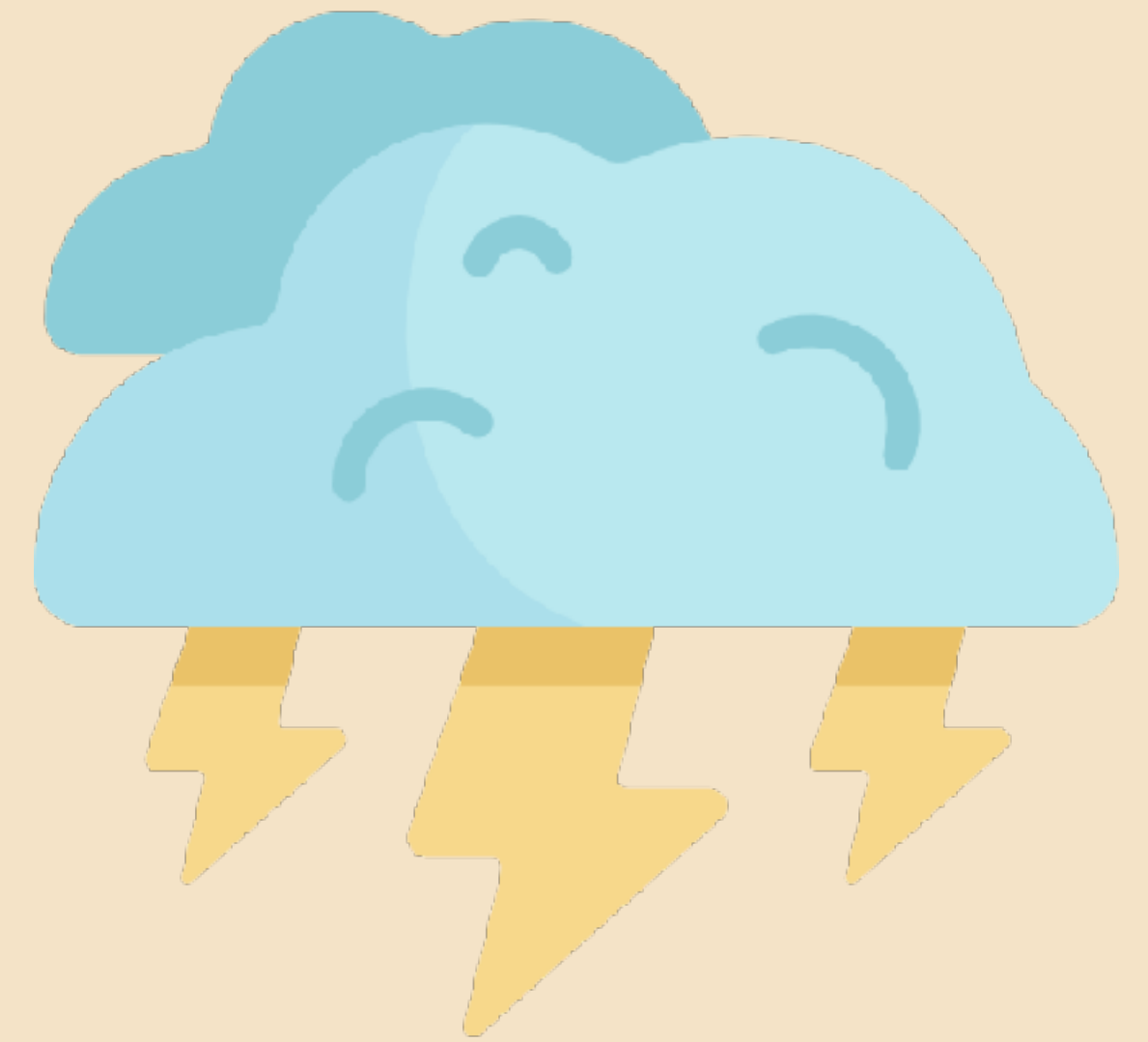
Communication styles



Positive



Fact-based



Intensity-based



Take time to understand
your audience's style.



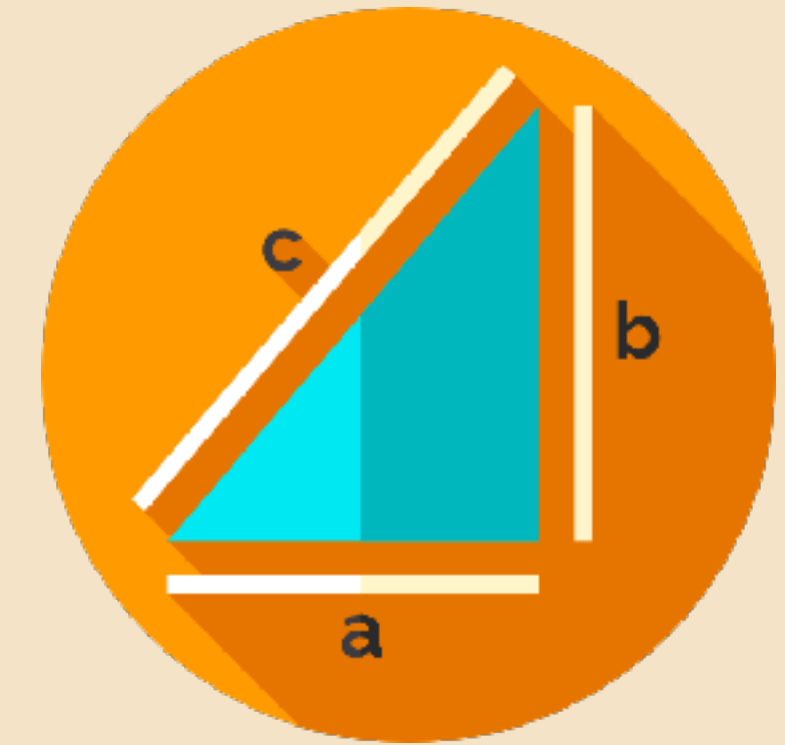
Let's recap!



**Identify your
true scope**



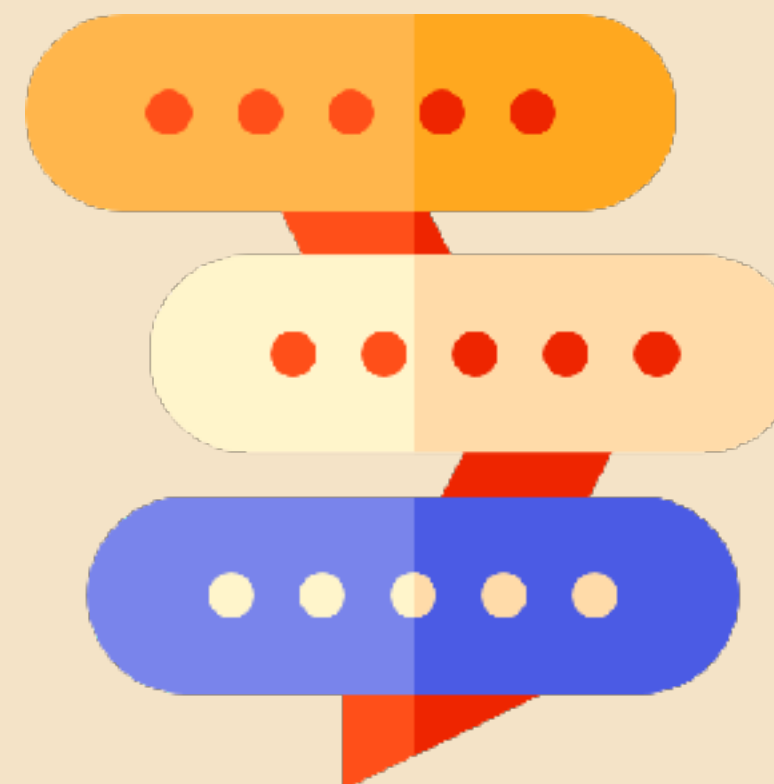
**Note what
stands out**



**Triangulate
your sources**




**Understand
the metrics**



**Build your
argument**



**Target your
audience**



How comfortable are you
with loose threads?



How empowered does your team feel?



Thank you!

dalia@shopify.com