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lead the change

Better Performance through User Research

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Chris Paddock

Cherwell

- Director of Cherwell's inaugural User Experience team
- Chris has over 20 years of experience in UX and digital strategy. He has buildt teams, applications, and processes at startups, not-for-profits, and Fortune 500 companies including Bank of America, Fidelity Investments, Sallie Mae, and Virgin Pulse

Housekeeping items you should know:

- Wifi Network:
- Beverages will be provided throughout the day in the lobby of Broadmoor Hall and Colorado Hall. Breaks will also be in both lobbies from 10-11am and 2:30 – 3pm.
- Lunch will be served in the International Center, next door. [for morning sessions]
- [We will fill in these details for you on your final slides.]
- There will be lab times to reinforce your learning.
- Virtual Machine instructions with unique passwords were handed out at the door.
- Cherwell staff are here to help you with the labs. If you need help, do not hesitate to ask.

Learning Objectives

In this workshop, you will learn:

- Fill out this section using action verbs from Bloom's taxonomy
- https://www.missouristate.edu/assets/fctl/Blooms_Taxonomy_Action_Verbs.pdf
- These key objectives will help you to organize your presentation, labs and knowledge check points.

PART 1

User Research Defined

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What Is User Research?

User research focuses on the "End User."

- Uses the product/feature you're trying to change.
- Uses it *every day*
- *Highly dependent* on it to perform their regular duties.

Cherwell End Users?

Technicians and Customers

How Does It Help?

- Identify what to focus on
- Understand how users use an application
- Discover pain points . . . and opportunities
- How to improve the user experience
- Validate proposed solutions

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Better UX means less time on tickets

Why Is It Important?

- Risk mitigation (measure twice, cut once)
- Cost savings (less time on tickets)
- Improve KPIs
  - First response
  - Rate of resolution
  - Customer resolution

Less risk, more savings

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When Do I Research?

- Pre-launch
    - Identify user goals
    - Understand user workflow
    - Document pain points
    - Validate design solution
- Post-launch
    - Measure effectiveness

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Research early and often

Saving Time & Money

Understand what's important, spend less time on what is not

- Project vs. no project
- Less development work, and rework
- Working from the same page (less noise, more proactivity)
- Less training

PART 2

Methods of User Research

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Research Dimensions

1. Attitudinal: what people say
2. Behavioral: what people do
3. Qualitative: direct observation
4. Quantitative: indirect observation

A mix of dimensions is always best.

Attitudinal vs. Behavioral

Attitudinal Att

- Understand their beliefs, opinions
  - How would you use this product?
  - Does it remind you of other products?

Behavioral Bh

- Observe users using your product
  - Do their actions match their beliefs?

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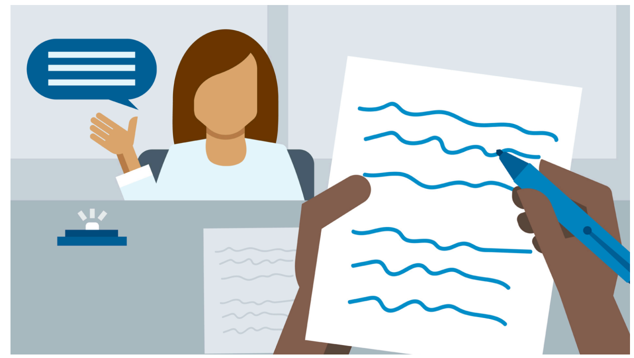
Qualitative vs. Quantitative

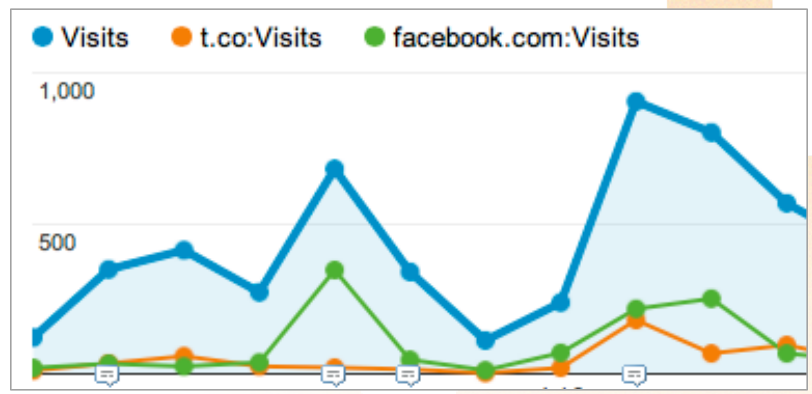
Qualitative Ql

- Often open-ended
- Relies on direct observation



Quantitative Qn

- Analysis is mathematical
- Relies on indirect observation



User Interviews

Att

QI

- Great place to start
- One-on-one discussion
- Knowledge transfer
  - How do you do your job?
  - How do you use this product?
- Likes and dislikes
- Helps set up subsequent research

Surveys

Att

Qn

- Looking for opinions
- Quantity in response is key
- Identify trends and hot spots
- Not definitive answers, helps provide areas of focus

If you want to know if users “like” your design or product, use this tool.

Landscape Analysis

Att Qn

- Evaluate top competitors
- Let users tell you who competitors are
- Analyze based on user needs and workflow
- Identify commonalities across competitors

Att

Qn

Best Practices

- Identify what you are trying to change, i.e. forms
- Find the authorities on the subject
- Find the canonical research on the subject

Card Sorting

Att

QL/Qn

- Helps understand how information should be organized, e.g. site map
- Users organized predefined cards into categories
- Can help define labels, e.g. navigation, fields

Focus Groups

Att QI

- Often confused with user testing
- Seeking early opinions on an idea
- Group discussion
- Written and verbal feedback

Field Studies

Bh

Ql

- Observe end user in their work environment
- Ask questions as they work
- Helps understand user's workflow
- Identify obstacles and opportunities in workflow

Usability Studies

Bh QL/Qn

- Great for validating designs
- One-on-one sessions
- Users perform specific tasks
- Results based on how well they complete tasks
- User opinions may identify areas for follow-up research

Analytics

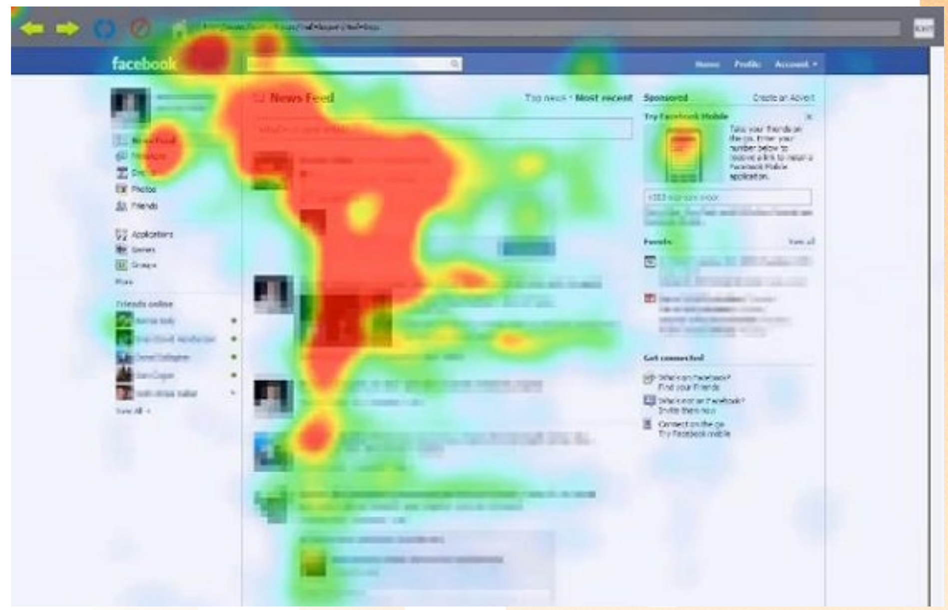
Bh Qn

- Measure exactly how users use your product
- Identify high or low usage of a feature
- Low usage ≠ remove feature
- Good to compare with observed behavior

Eye-Tracking

Bh Qn

- “Visual” analytics
- Heat maps show you where users look while using your product
- Hot spots can help identify workflow of a given feature
- Equipment is unobtrusive and mobile
- Renting can make it affordable



PART 3

Case Study: Research in Practice

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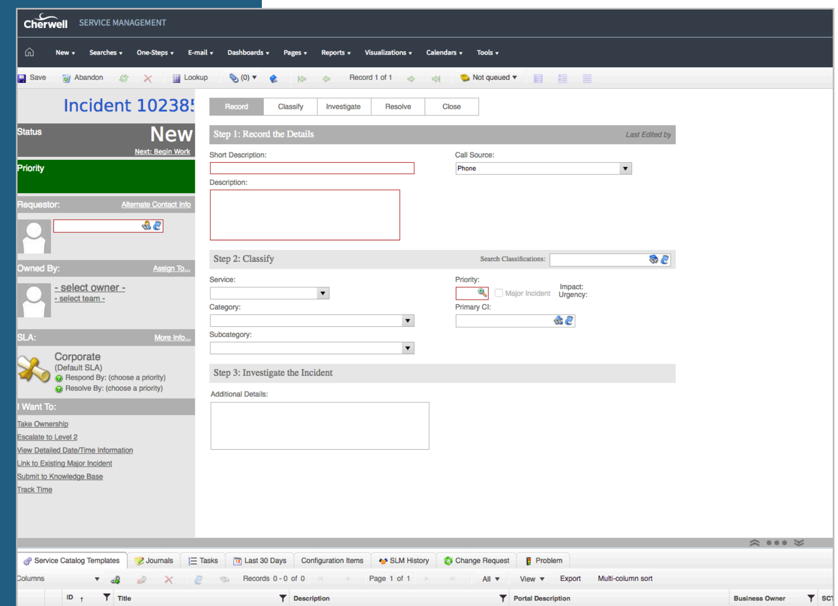
Incident Redesign

- Lots of anecdotal data tells us our design is dated
- New UX team identifies a lack of best practices in the product
- Analytics tells us Journals are most used object by our customers



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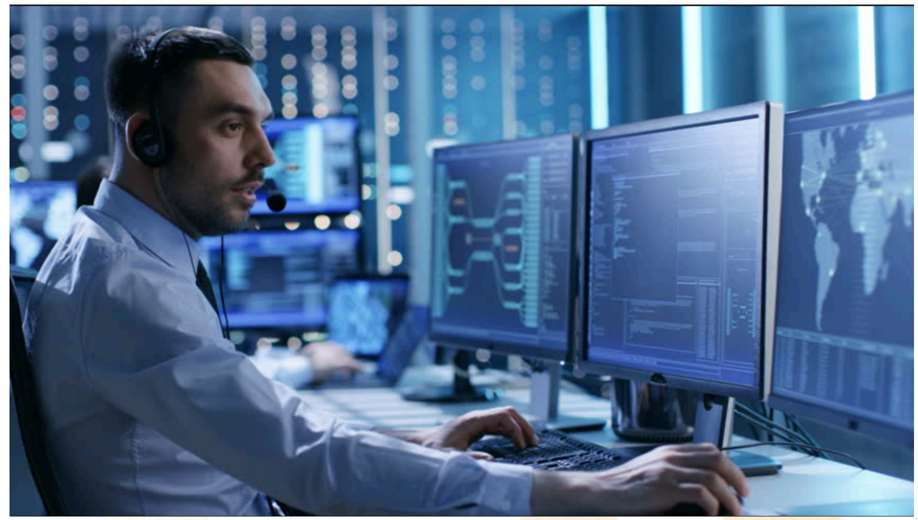
The End User

- Who uses Incident?
  - Technicians
  - Customers
  - Managers

What We Need to Know

- What are technician goals?
- What is their Incident workflow?
- What are competitors doing?
- What best practices do we need to know?



User Interviews

- How do techs use Incident?
  - Tech 2 come in "blind"
  - Can take 60 min to assess a ticket
  - Scan meta info first, then ignore
  - Classification can take time

- Journals are the focus
  - View as a timeline
  - View entries in detail
  - Customer comms often broken out

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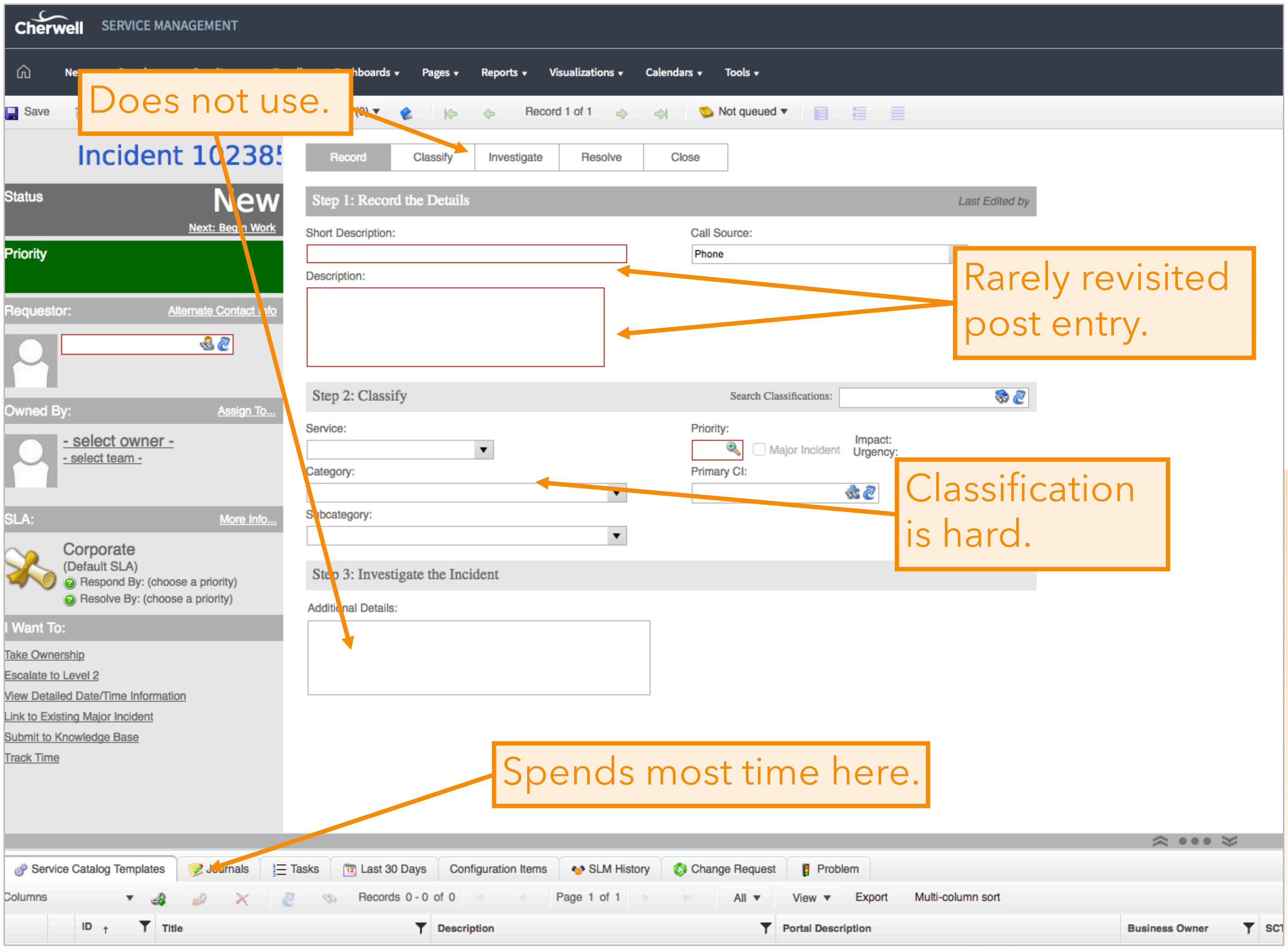
Self-Evaluation



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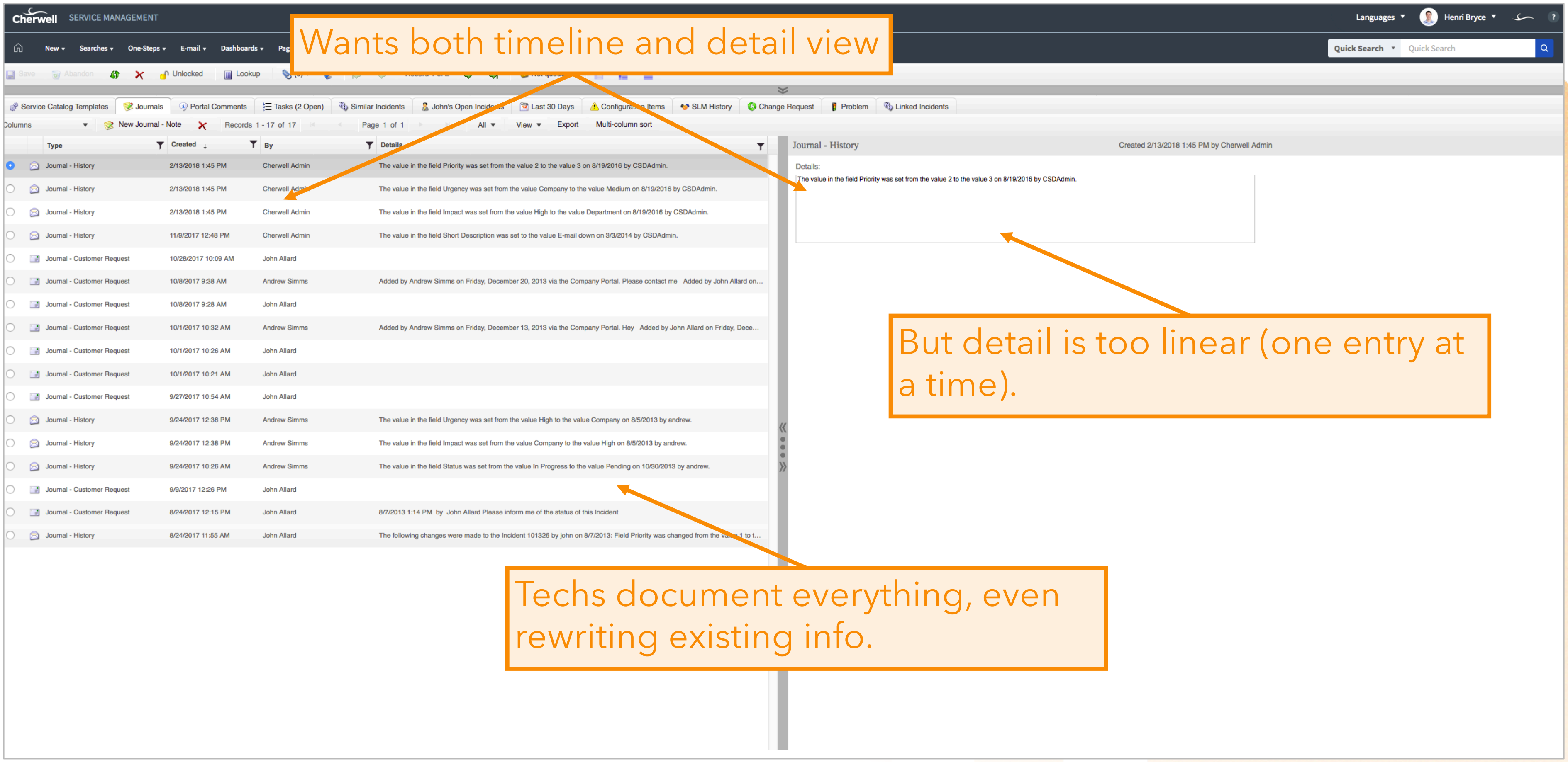
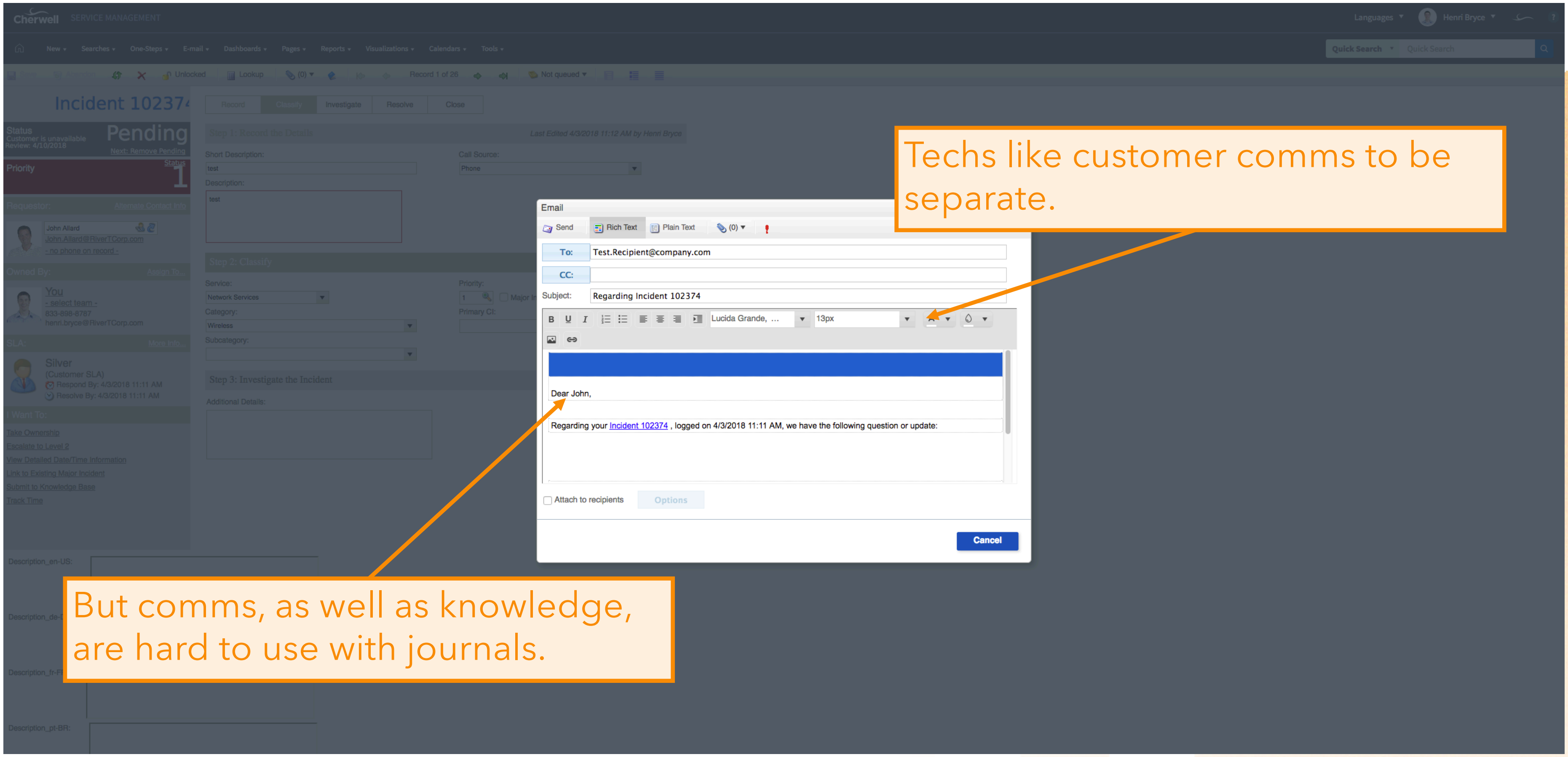
Self Evaluation



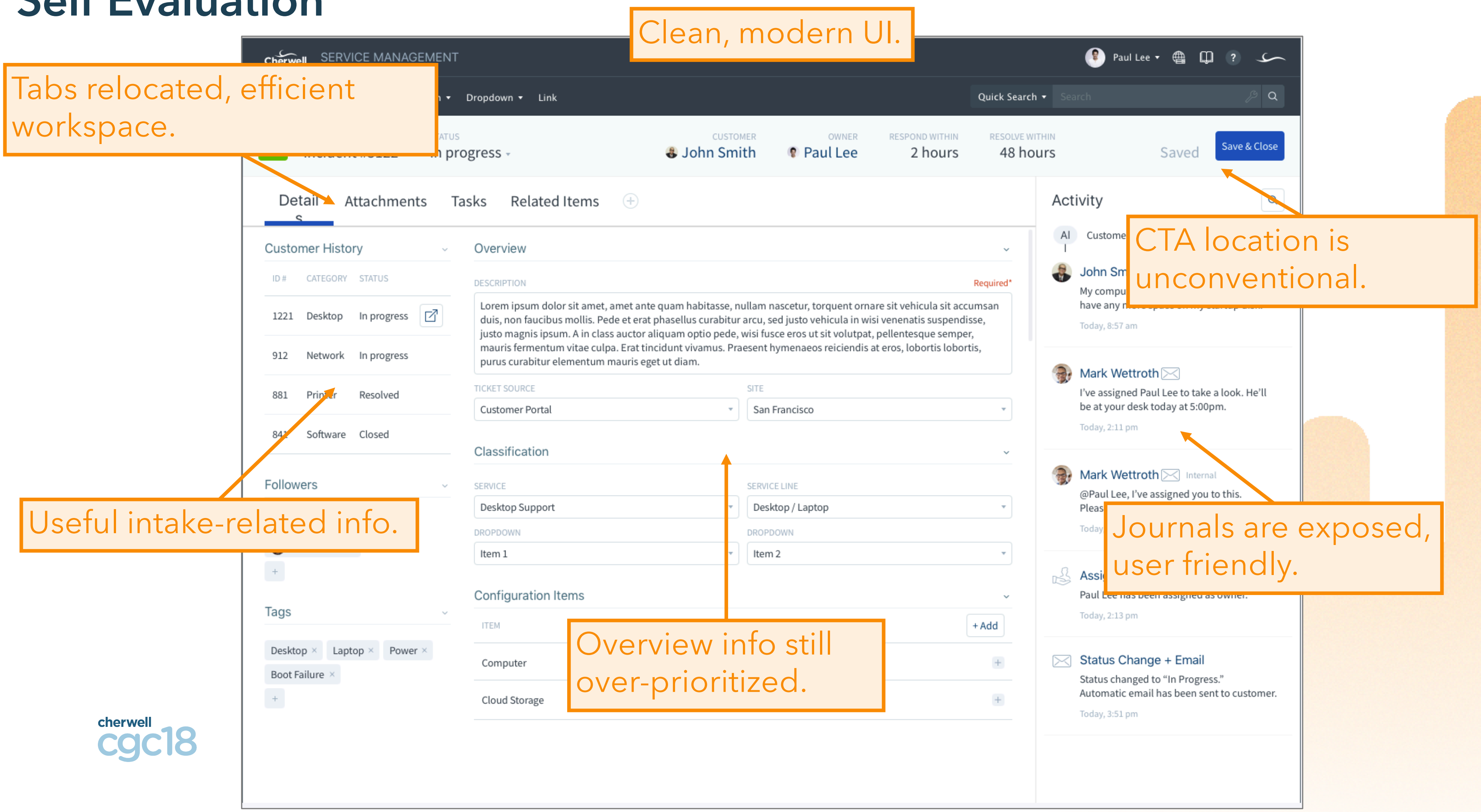
Self Evaluation



Techs like customer comms to be separate.

But comms, as well as knowledge, are hard to use with journals.

Self Evaluation



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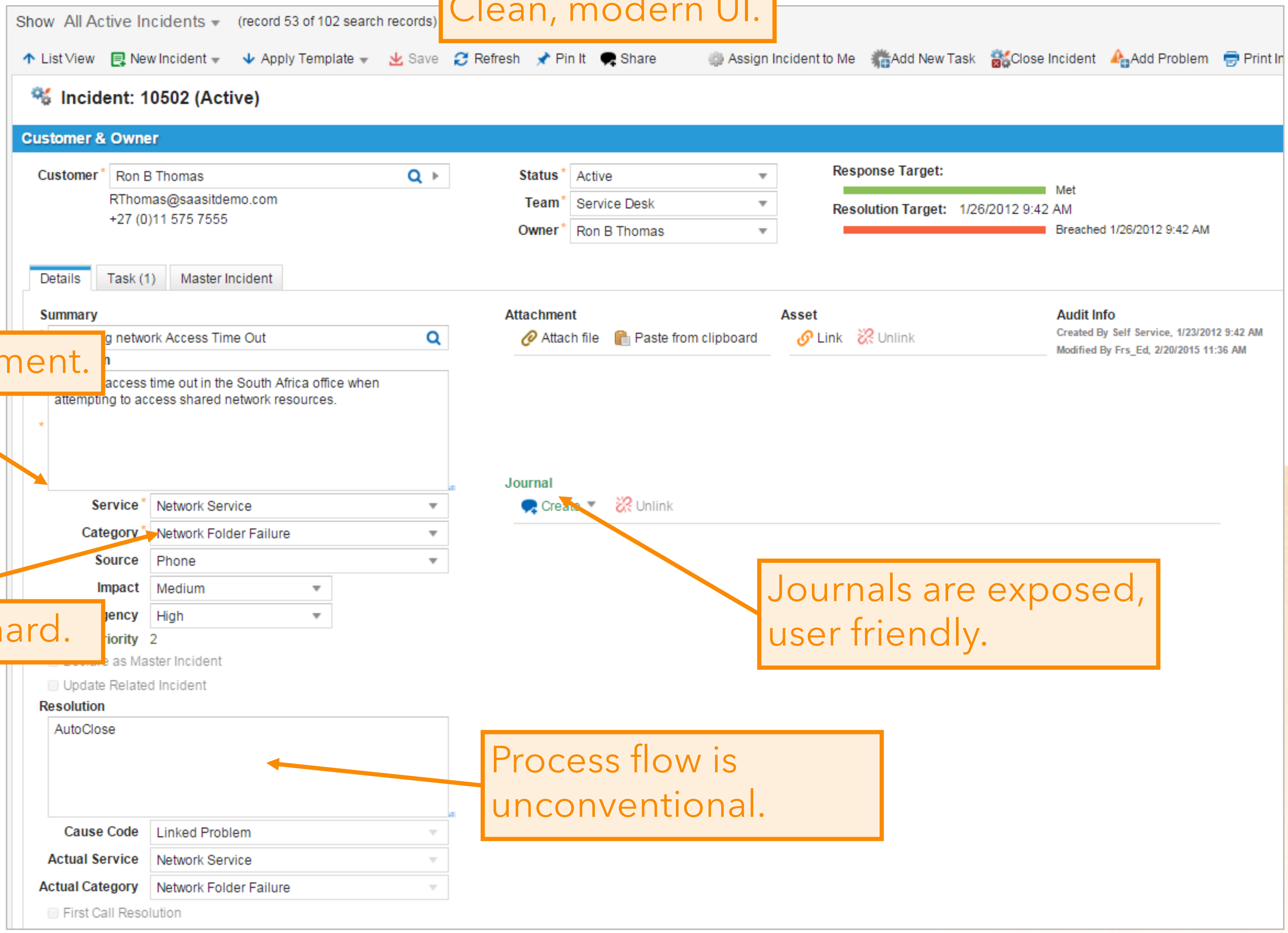
Competitor Research



Clean, modern UI.

Clean field alignment.

Classification is hard.

Journals are exposed, user friendly.

Process flow is unconventional.

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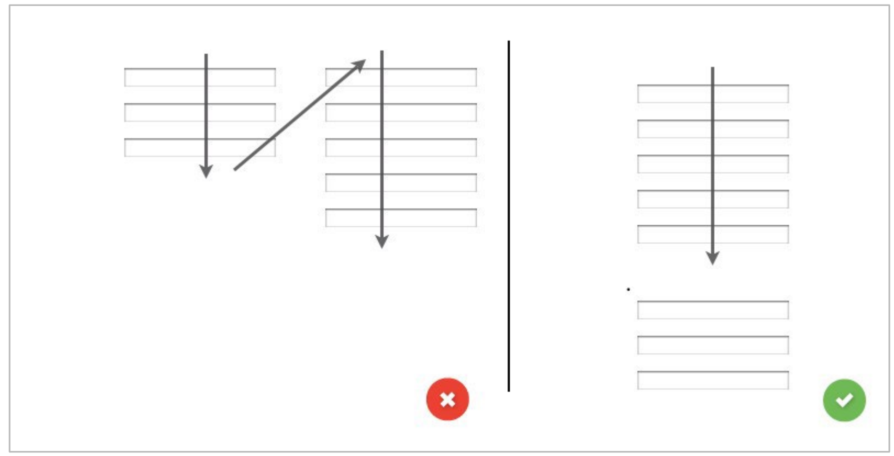
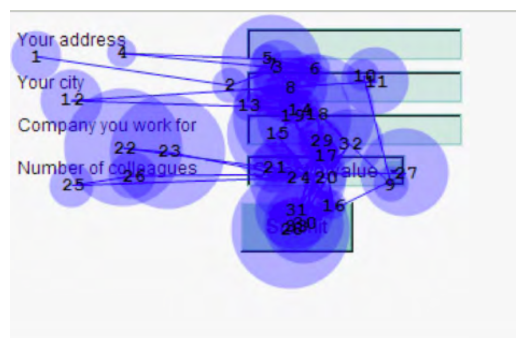
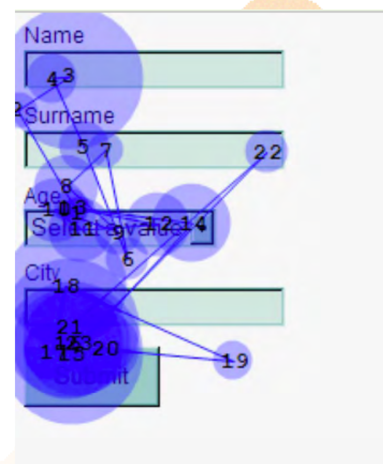
Best Practices

- Form Best Practices
  - Eye-tracking studies
  - Vertical alignment
  - Top-aligned labels
- Other Resources
  - Credit card apps (all on one page)
  - Mortgage applications







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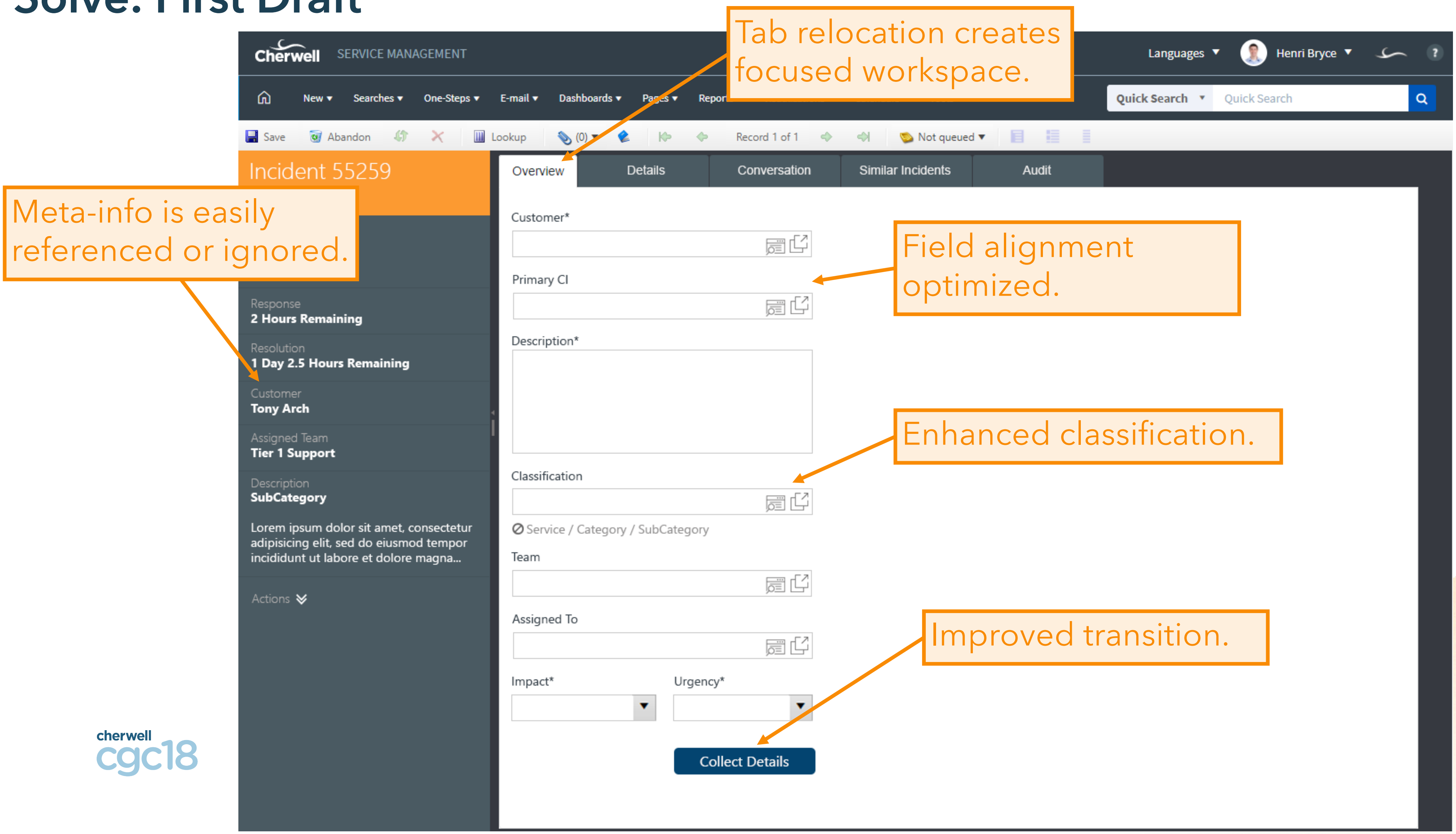
Solve: First Draft



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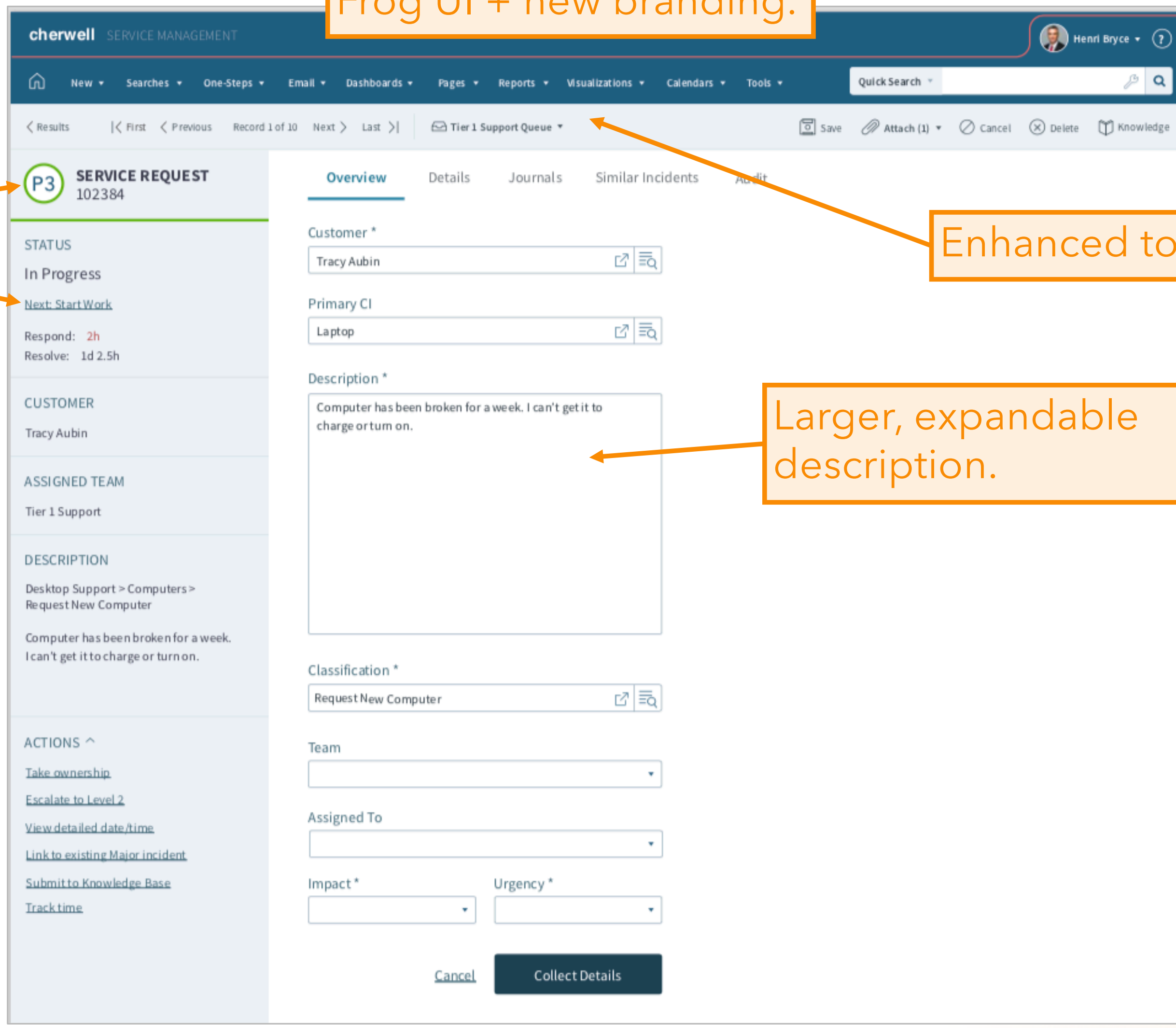
Solve: Forms

Frog UI + new branding.

508 compliant design.



Enhanced toolbar.

Larger, expandable description.

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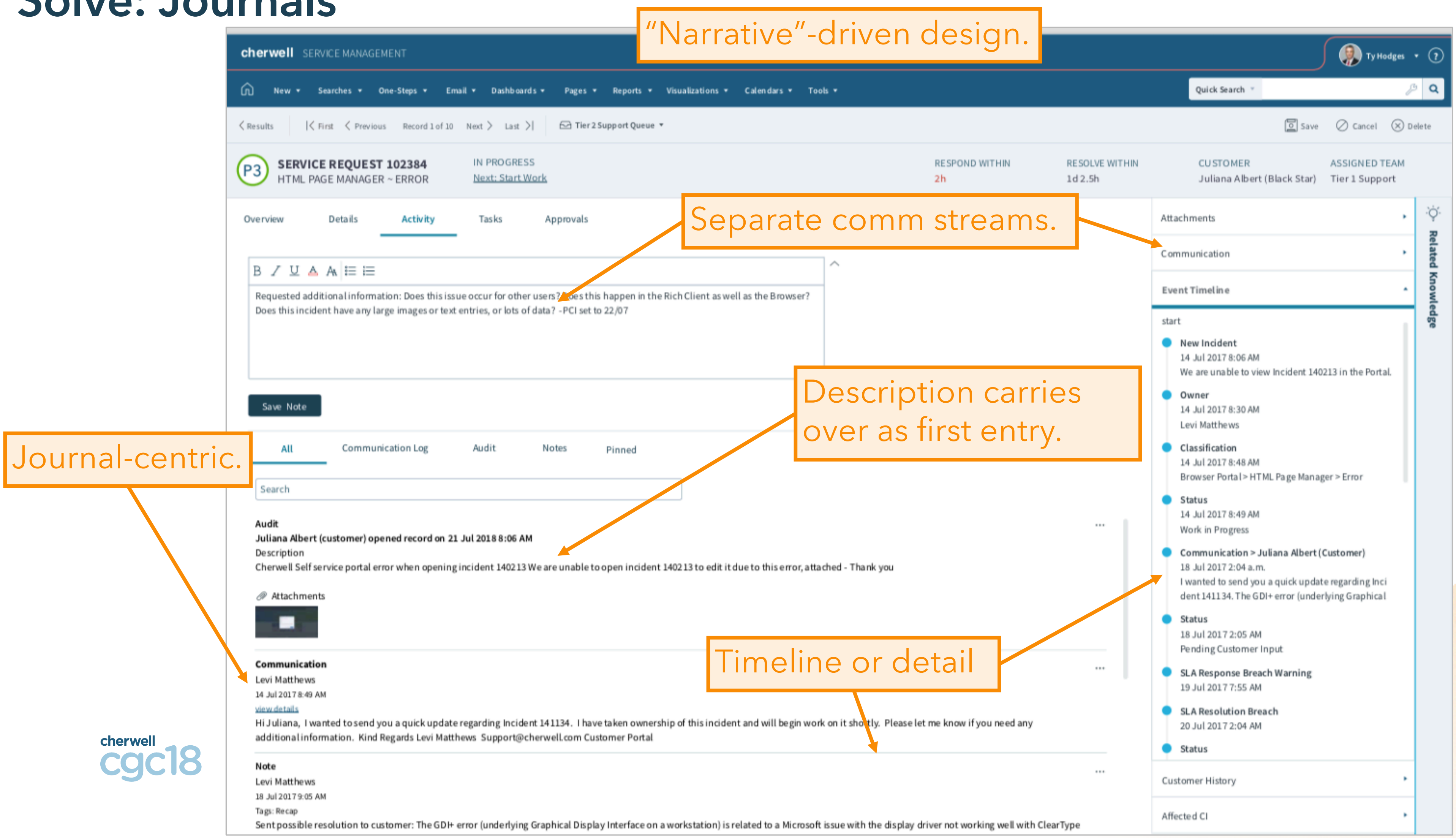
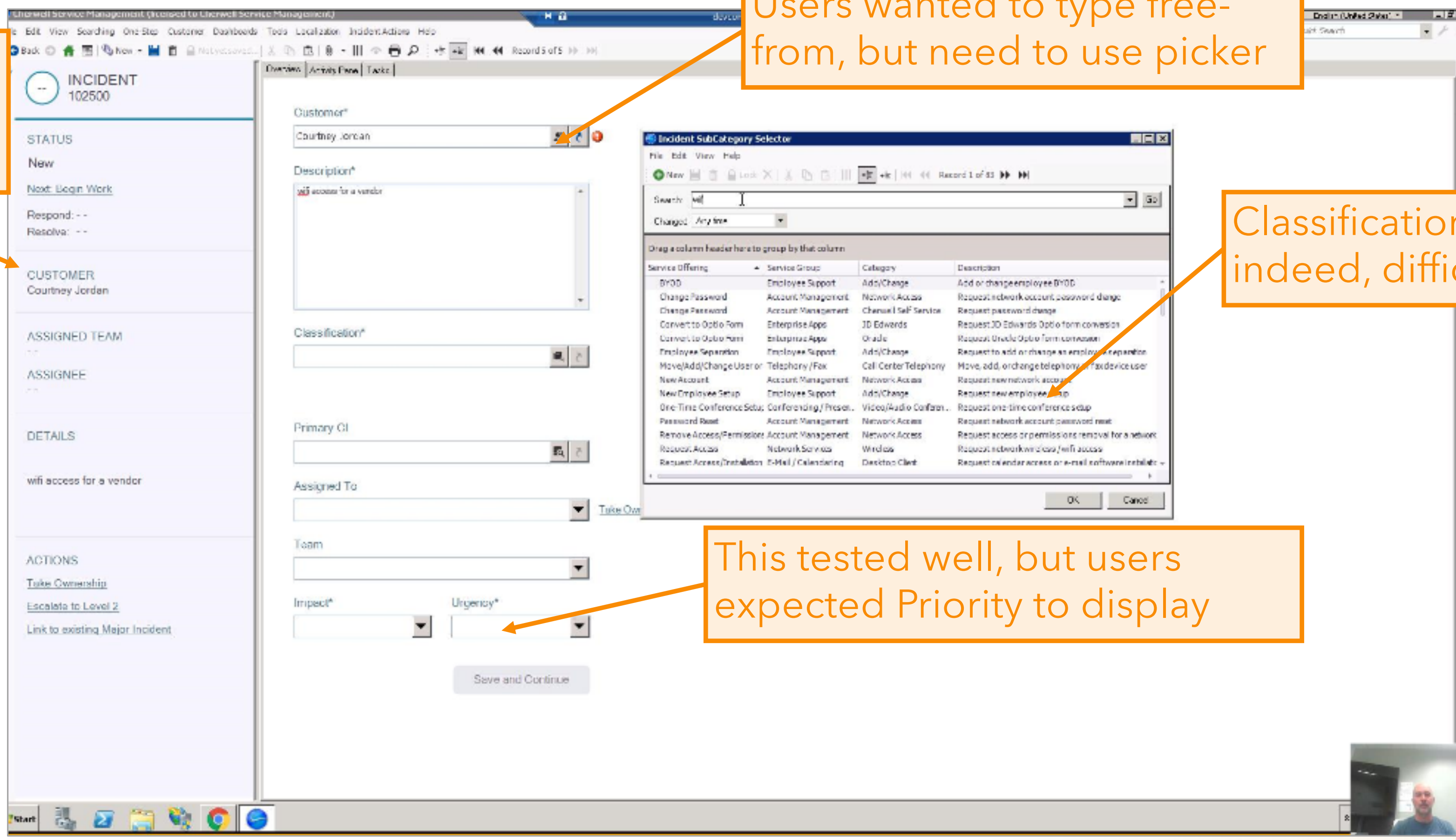
Solve: Journals



Usability Testing (Validation)

Most users didn't see this info

Users wanted to type free-from, but need to use picker



Classification was, indeed, difficult

This tested well, but users expected Priority to display

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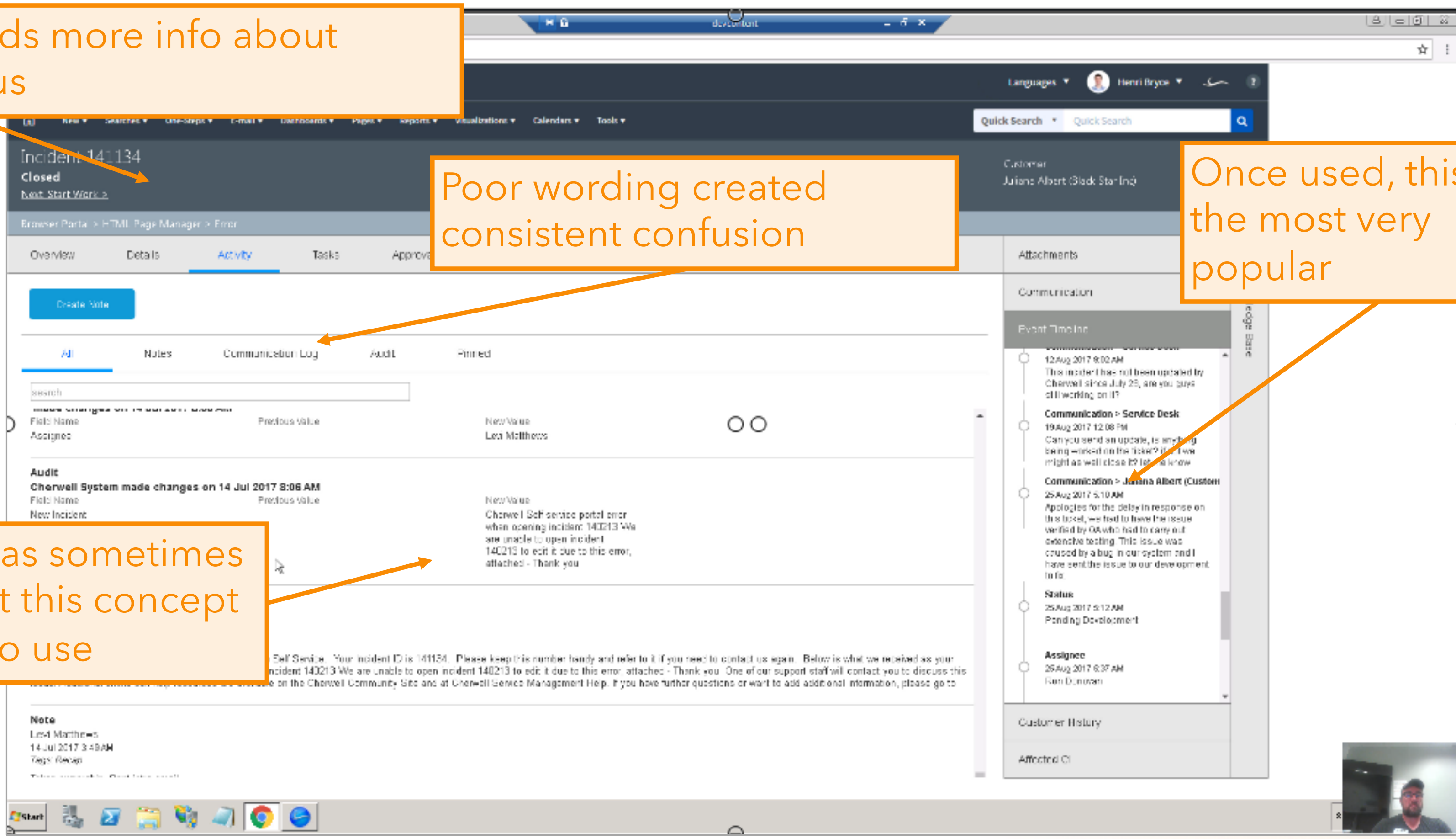
Usability Testing, cont.

This area needs more info about urgency, status

Poor wording created consistent confusion

Once used, this was the most very popular

Orientation was sometimes confusing, but this concept proved easy to use



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Research Summary

- Interviews provided a great foundation for what may be working, not working
- Analytics told us we were focused on the right thing
- Competitive and Best Practices refined our ideas for change
- Usability testing validated direction, identified lots of opportunities for refinement

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UX Research Opportunities

- **Interviews**
- **Field testing**
- **Eye-tracking**

Contact:

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Please be sure to fill out the survey for this session in your App. Thank you!