Hello you

Mini-guide

Get to know your users in 4 weeks.

A QUICK-START GUIDE FOR THOSE NEW TO ONLINE USER RESEARCH.

*The companies that **get innovation right**, again and again, are the ones that **feel what their customers feel**.*

SOHRAB VOSSOUGHI

Ziba

The industry is now in a good place.

One of the first steps to **creating great digital user experiences** is to **understand the needs of your users**. Sounds obvious now... but it's taken the industry 20 years or so of website and digital development to come round to this way of thinking (remember some of the completely unusable sites of the early noughties?). Now almost every new brief contains phrases like 'user-focused design', 'meet user needs', 'engaging to users' and 'great UX'. As a default starting position this is great but how well do these lofty aims actually end up translating into the finished product? Put another way, **how well do brands really know their users**?

We often find that real evidence of what users think and need tends to be pretty thin on the ground and the appetite to dig deeper is small. Most business are happy to just assume user needs. Not many want to engage with the audience and ask them directly. **Using a best-guess as the basis for tens, or hundreds of thousands of pounds worth of work just doesn't stack up**. So we're going to walk you through some methods to really get inside the heads (and hearts) of your users, without huge cost or time overheads.
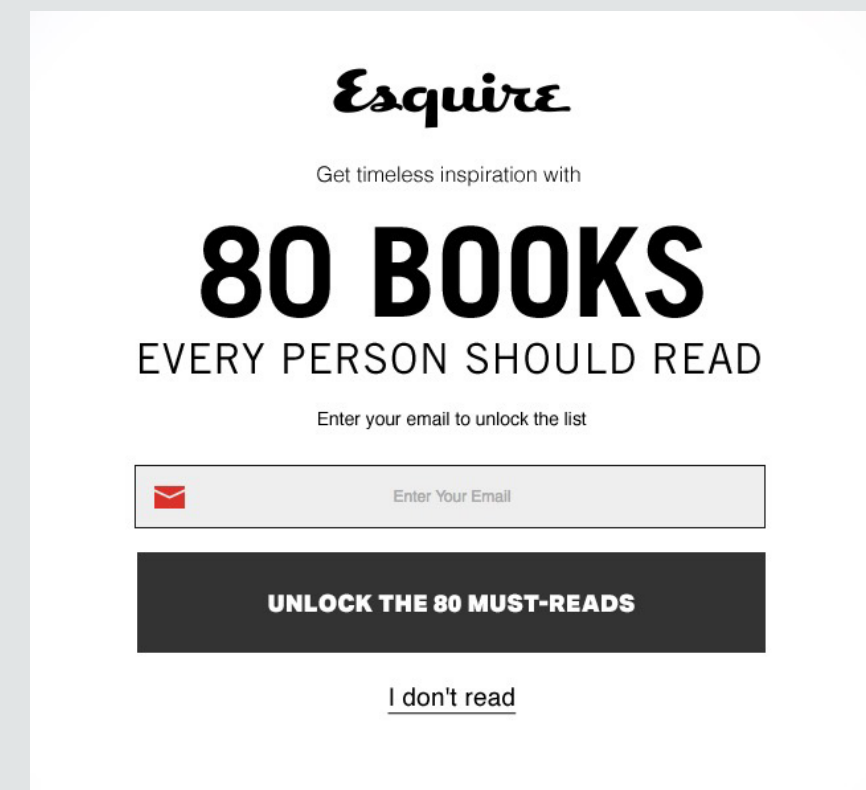
Love data,
but **know more**

Before we get to the 'how to' section there's something else to be mindful of – a tendency to place a reliance on quantitative analytics **over qualitative insight**. After all, who doesn't love data? However, for all the hype about big data, it's only a viable option for large enterprises with deep pockets and access to extremely large datasets not usually available to most businesses.

Instead, the majority use analytics and tools such as A/B testing. Analytics enables you to measure if something is working – utterly essential, of course. However, it won't tell you **why** it's working (or not). It never gives you much of an idea into what users think of your business or website. It won't tell you their first impression, or why they prefer your competitor's site. And A/B testing can give misleading results* unless you have a significant volume of traffic.

Additionally, the blind chasing of metric-driven success soon takes you down the murky road of using '**dark patterns**' to achieve better conversion – by duping and tricking users – even if it usually comes at a loss of brand credibility and loyalty in the long term.

We recommend a more balanced view that pulls back from a pure metric focus and looks at the issues in a more holistic way.

* From: Is A/B Testing A Good Idea For SaaS Startups? by Tomasz Tunguz

Esquire

Get timeless inspiration with

80 BOOKS
EVERY PERSON SHOULD READ

Enter your email to unlock the list

Enter Your Email

UNLOCK THE 80 MUST-READS

I don't read

NOTES ON
dark patterns

A blind focus on metrics could lead you down dark paths to improve conversions.

C O N F I R M S H A M I N G

The name for the art of manipulating users into signing up to something by using a 'no thanks' label users find hard to agree to.
It may work – but at what cost to brand and loyalty?

Fully-rounded insight

To craft a great digital brand and user experience, **analytics and qualitative insight need to team up**. Because qualitative insight takes a bit more effort to get, it tends not to be done. But it shouldn't be seen as difficult. We'll explain how, in just 4 weeks, you can run 3-4 activities that will give you some great insight and firm empirical evidence as to what your users think about your digital brand, your digital presence, your content and what they really want from it.

This will give you clear direction for your digital strategy. Or if you already have a strategy, it will validate it before you go to the time and effort of implementing. We encourage all clients to do it.

So, this short guide is to help you get started, to replace guesswork with evidence. It's not going to give you all the answers, and of course you can easily do a lot more. Our aim is to give you a feel for what you can do... and that you can do it relatively easily.

THINGS
to find out

To understand who is visiting and why

- *Who really are our users? (e.g. groups)*
- *What prompted their visit?*
- *What do they want? (goals)*

To assess brand and messaging perceptions

- *First impressions*
- *Comparisons to others*
- *Perceptions of our brand / business (emotive response)*
- *Comprehension / relevance of messaging*

To aid content planning / development

- *What content are our users looking for?*
- *Is it useful / relevant?*
- *What would they like more of?*
- *Could they find it?*

To assess usability / experience

- *Why did they come (what task / info)?*
- *Did they find what they were looking for?*
- *How they found the experience?*
- *How did nav / functionality perform?*
- *What could be added to make it better?*

To assess creative development

- *Conceptual testing*
- *Design evaluations*

Have a clear focus

It's important to know you can't get all the answers at once. So you need to be clear and realistic about goals. We'd suggest a narrow focus on finding out a specific knowledge gap or solving a particular problem, for instance:

'We want to understand who is really visiting our site and what prompted their visit'

'We want to understand our users' first impressions and opinions on our messaging'

'We want to identify ways to improve the site navigation'

'We want to identify ways to improve subscriptions'

'We want to understand which content our users value most so we can make our content marketing more relevant and effective'

Tools to use

So now you know what you want to find out, here are 4 tools that we commonly use, are available to everyone, and are easy to implement. We've included a few tips and gotchas to watch out for.

#1
Surveys

#2
Live chat

#3
Optimal workshop tools

#4
Remote user testing

1. Surveys

Surveys are very simple to set up, and useful because you get input directly from visitors. These should appear 60-90 seconds after a user arrives, not immediately. Surveys need to be branded to look like your site: you've got to look like you've made the effort! Most low-cost tools will enable you to do this.

There's no need to use the overly-clunky and poor UX expensive market research tools (naming no names, but you often see these on automotive sites. Urrgh.)

TIP: keep them short! You want 4-5 questions max, starting with multiple choice (to identify and group users) and then ending with freetext.

**TIP:** use the thank you page of surveys to recruit for participants for remote user testing.
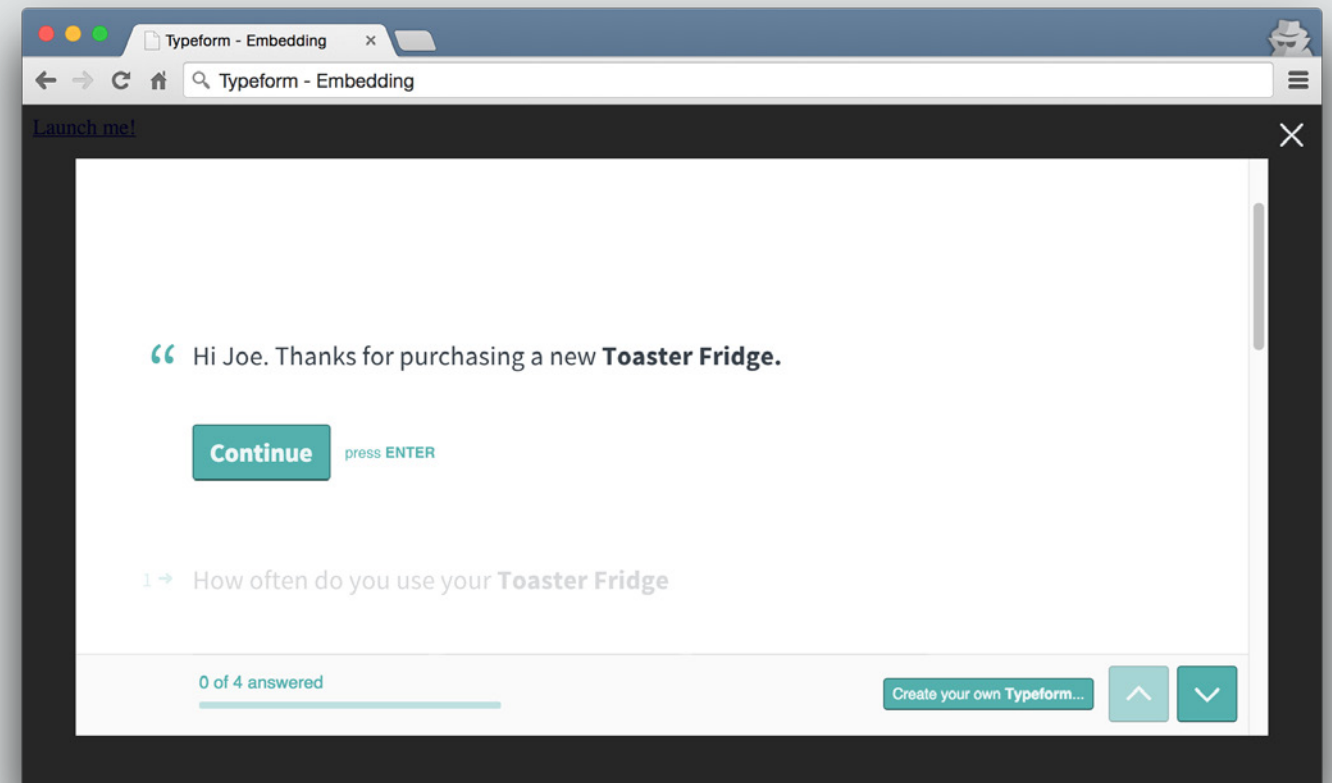
2. Live chat

Like surveys, LiveChat gets you input from live site visitors. However with LiveChat you have the advantage of being in a **real conversation** with users – this let you get deeper and more nuanced feedback. LiveChat does require a little setup, manning and scripting. But this isn't difficult: there are lots of 3rd party options – some better than others, and it's easy to turn on/off. It's also possible to target specific pages so you can zero in on particular research needs.

TIP: target specific pages so you can have a more focused conversation.

TIP: make sure you save the transcripts.
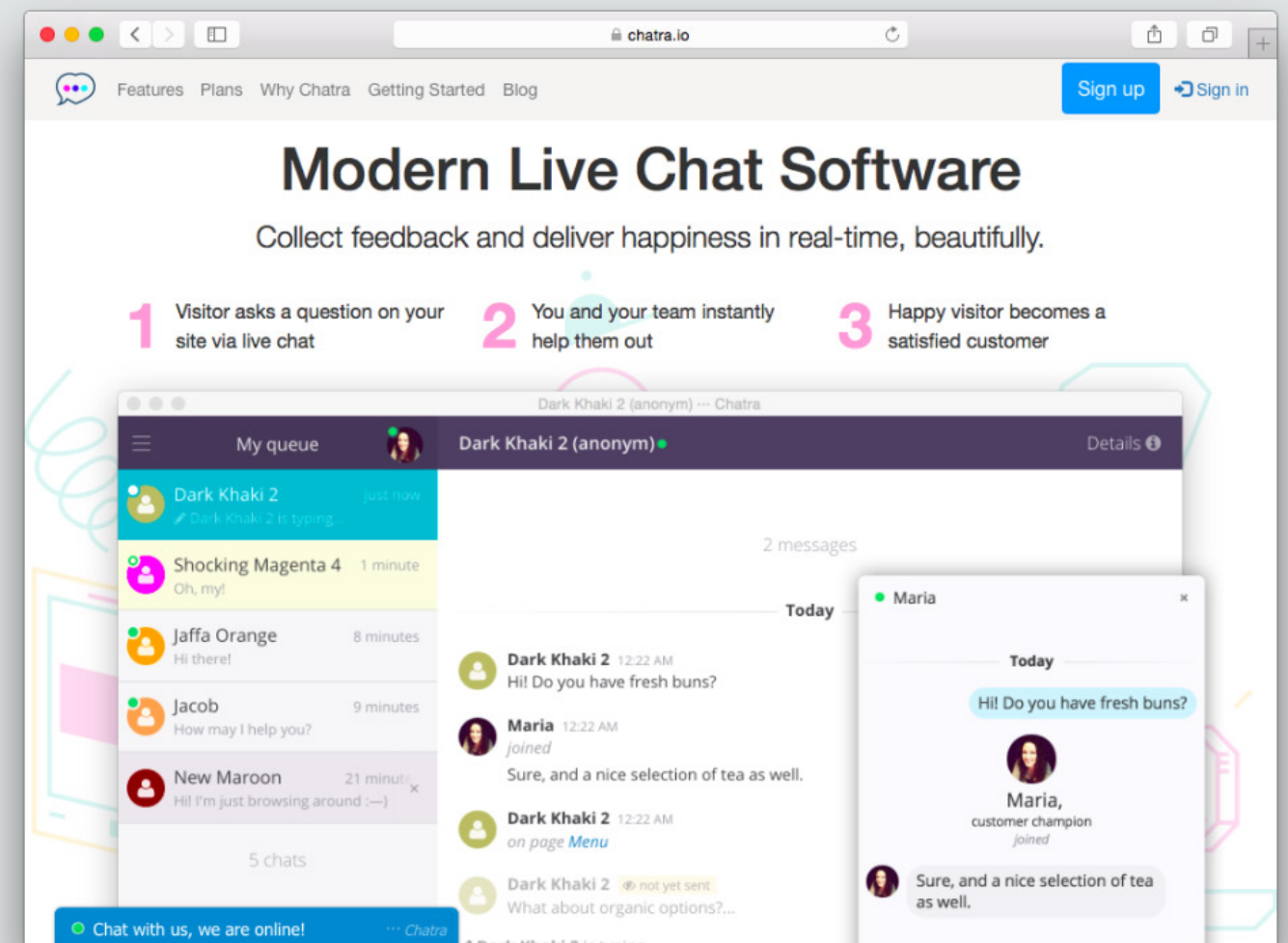
3. *Optimal workshop tools*

Optimal Workshop is an online company that provides a range of online UX tools, such as OptimalSort and Treejack, that are digital versions of classic user research techniques.

These tools help you reveal how your users' think. They are great tools to identify:

- how to organize content in a way that is most important to your users, or to identify which content they are most interested in.

- how users expect to navigate your site or app. You can test navigation labelling and hierarchies to identify the best structure.

They are quick to set up and provide great reports.

Optimal Workshop tools are just one of a range of online tools. For a great list of what's available, **see here**.
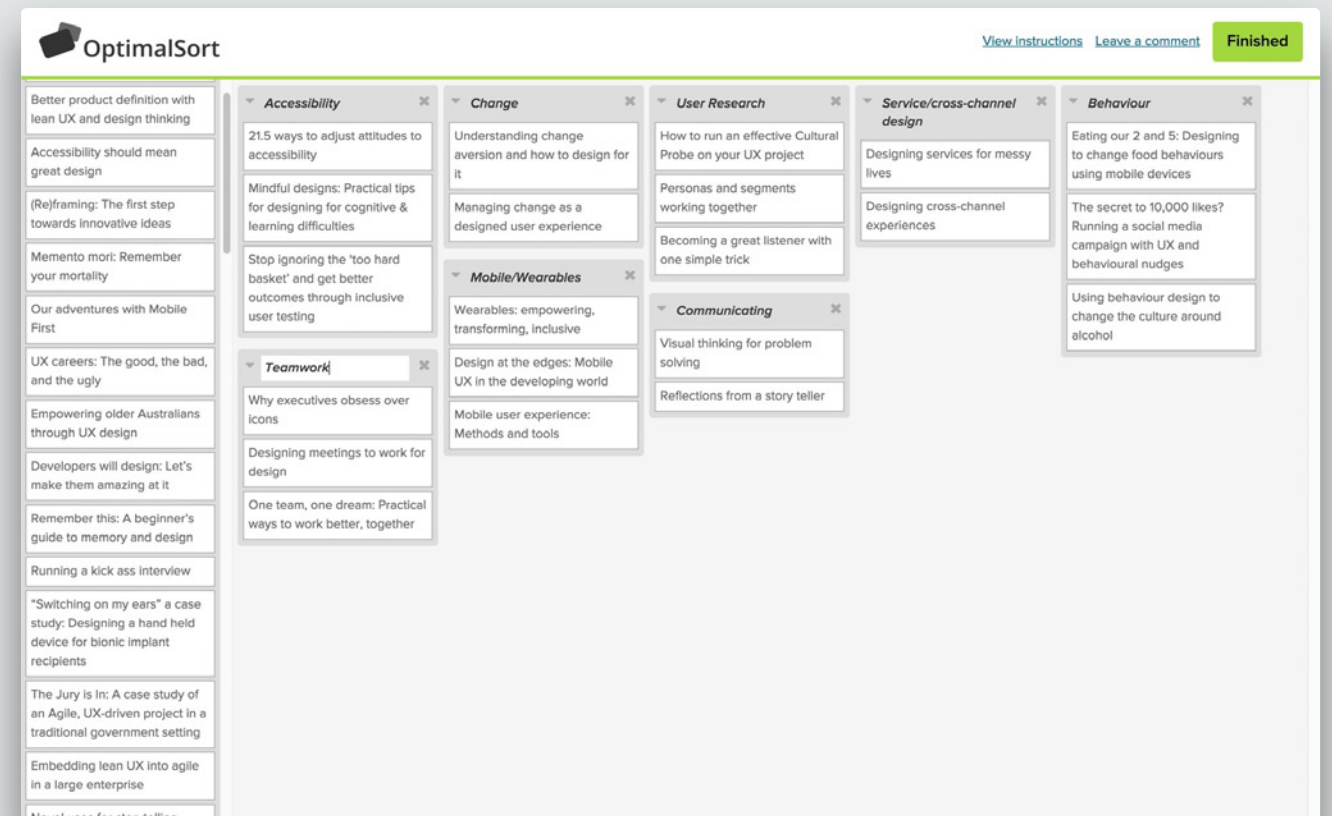
4. Remote user testing

Remote user testing is done via Web Conferencing tools such as GoToMeeting. It enables you to watch your users conduct a range of tasks, seeing both their ability to complete the tasks but also to discuss their opinions and reactions.

Testing 8-12 people will give you some great insight, and will only take a couple of days' worth of time to do. If you have a very niche audience, recruitment can be tricky (though you can use the survey to help, or lean on your database).

User testing is often seen as usability testing, but it's also great for conceptual testing: e.g. testing new creative ideas / design alternatives.

TIP: you're going to need to offer an honorarium (= pay them) for their time. A £20 Amazon voucher normally does the trick.
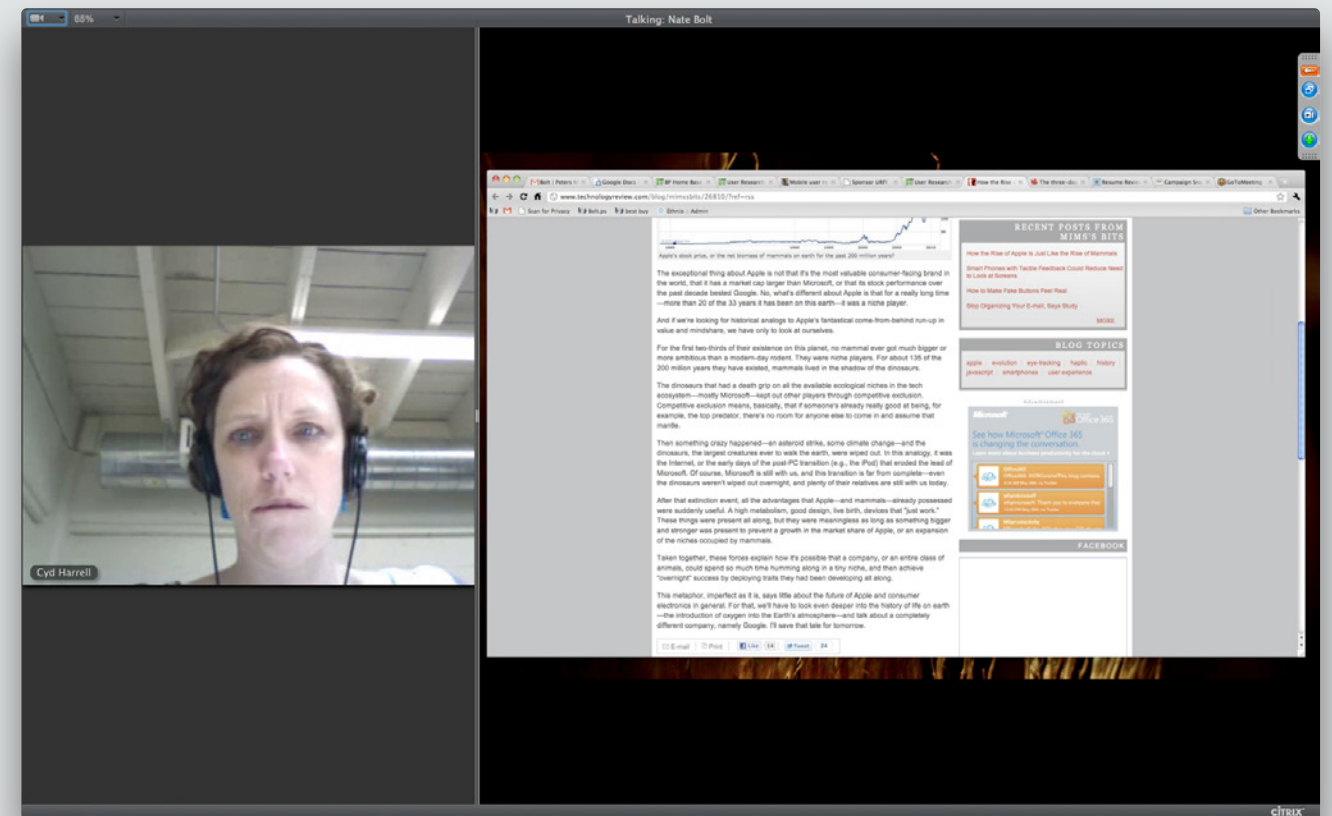
How to do it in 4 weeks – 3 typical scenarios

1.
We want to understand who is really visiting our site and what prompted their visit.

Week 1-2: Set up your survey. Identify user groups, why they are visiting, if they found what they are looking for; ask for feedback or suggestions for improvement.

Week 3: Hold 3 x 2 hour live chat sessions for more nuanced feedback.

Week 4: Now test some ideas on improving the experience by using remote testing. Ask users to complete common tasks (identified from survey). Get input on alternatives, prototypes etc.

2.
We want to identify ways to improve subscriptions

Week 1: Hold 3 x 2 hour live chat sessions to engage users and ask them if they considered subscribing. Uncover what's attractive/unattractive about your subscription offers.

Week 2-3: Set up your survey. Identify user groups, ask them what sort of content might prompt them to subscribe. Aim to identify what they value the most.

Week 4: Create some prototypes or mockups. Run these past 4-6 users via a remote testing session for feedback. Identify the preferred options and then look to implement.

3.
We want to understand what content will appeal most to our users.

Week 1: Review analytics to understand what users currently read and download.

Week 2: Set up a survey asking site visitors what content they would like to see more of.

Week 3: Set up Optimal Workshop card sort test that asks users to order and rank possible content subjects in order of appeal. Email a small selection of your database to do the test.

In summary

For a relatively modest investment and effort, you can replace guesswork with insight and learning. The benefits this can bring to your business and brand can be profound:

- Remove over-reliance on assumptions
- Provide the evidence to inform or validate a digital strategy
- Give direction on how to prioritise digital work
- Gain consensus amongst the team on what to do next
- Identify the more effective way to solve specific problems
- Identify most resonant creative and messaging
- Input into persona development (if you're doing this)

If you've made it this far, we hope you're inspired to get started. And if you'd like any more help or advice on getting started, feel free to get in touch – we'd love to help. In the meantime, here's some links to kick things off.

CONFIRMSHAMING
http://confirmshaming.tumblr.com

LIVE CHAT
www.capterra.com/live-chat-software

UX AND TESTING RESOURCES
https://uxdesign.cc

SURVEYS
www.typeform.com

OPTIMAL TOOLS
www.optimalworkshop.com

LIMITATIONS OF A/B TESTING
http://tomtunguz.com/ab-testing-saas/

ABOUT
Hello you

Hello you *is a digital design and UX specialist, with extensive experience in B2B digital design, digital brand design and user interface design.*

We work with clients looking to transform how their customers perceive and interact with their business, products and services.

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