I214 Planning research

January 29, 2013

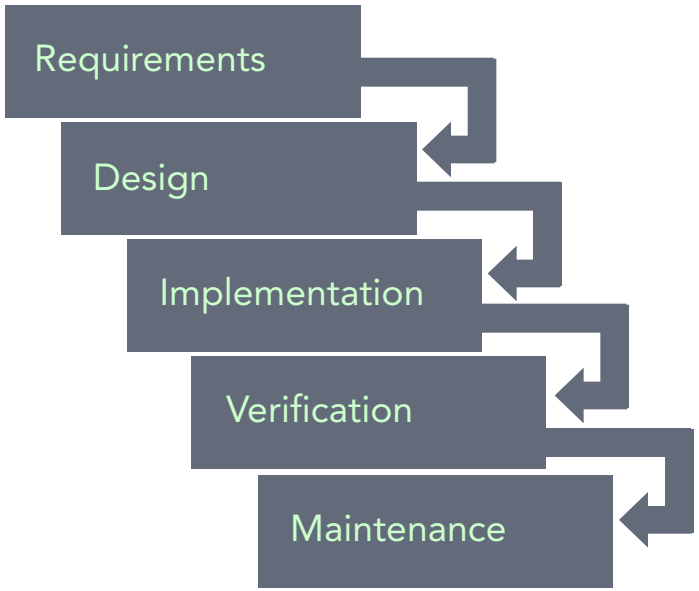
Naïve usability test overview

Part I

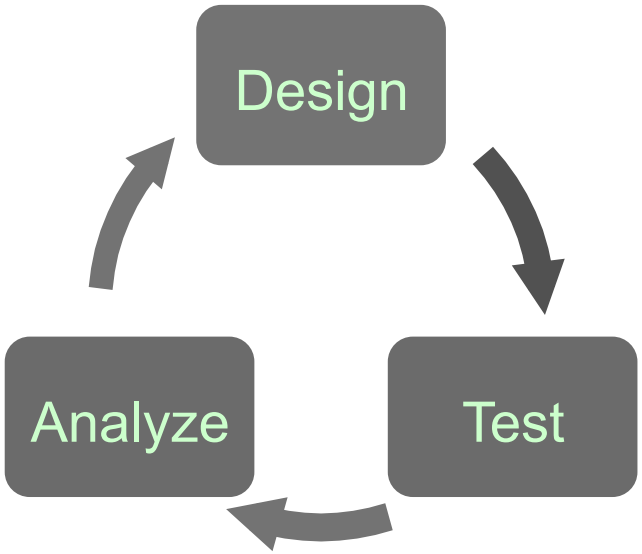
THE PLACE OF RESEARCH IN DESIGN AND DEVELOPMENT

Two contrasting models

Waterfall

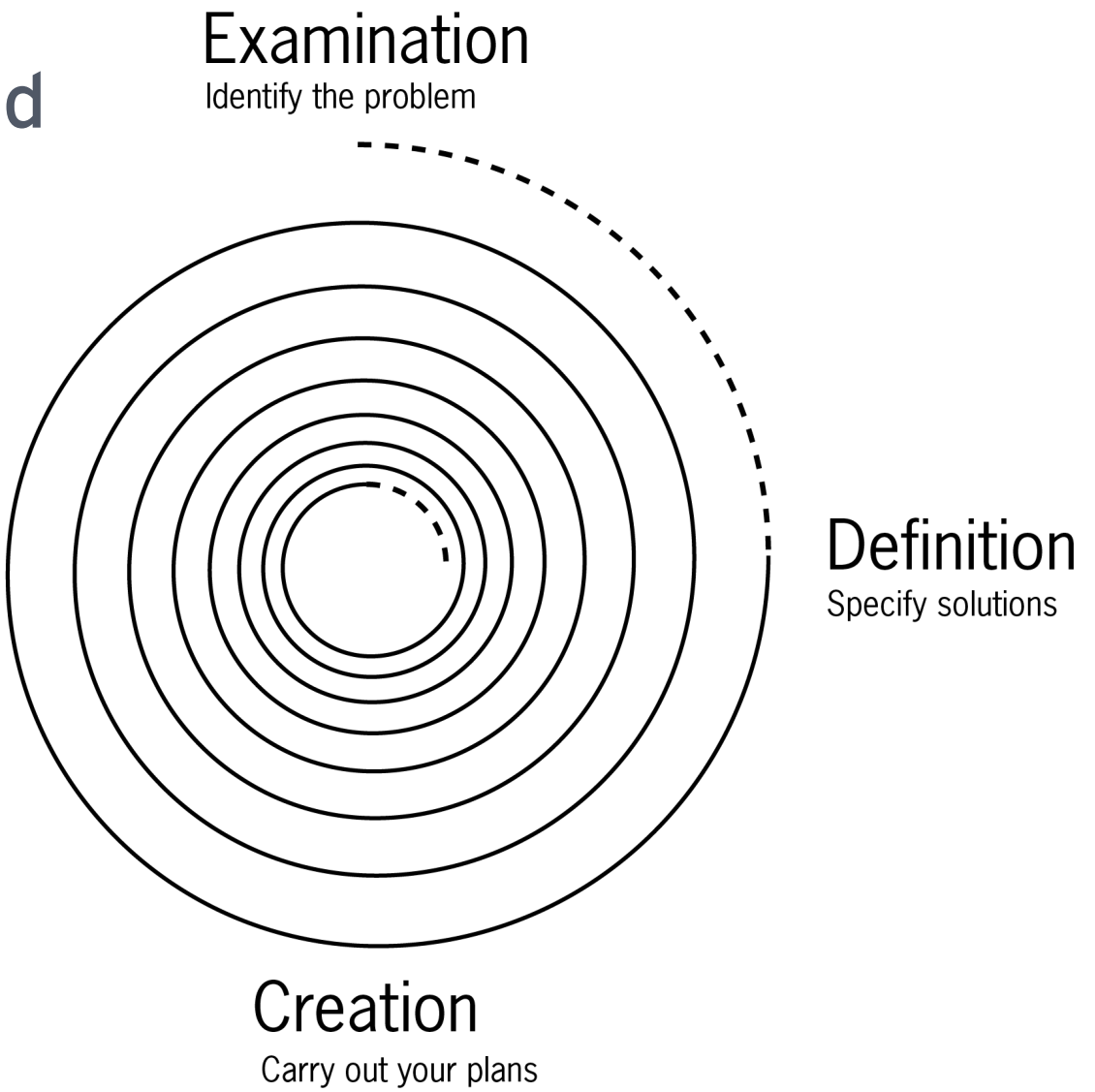


Iterative



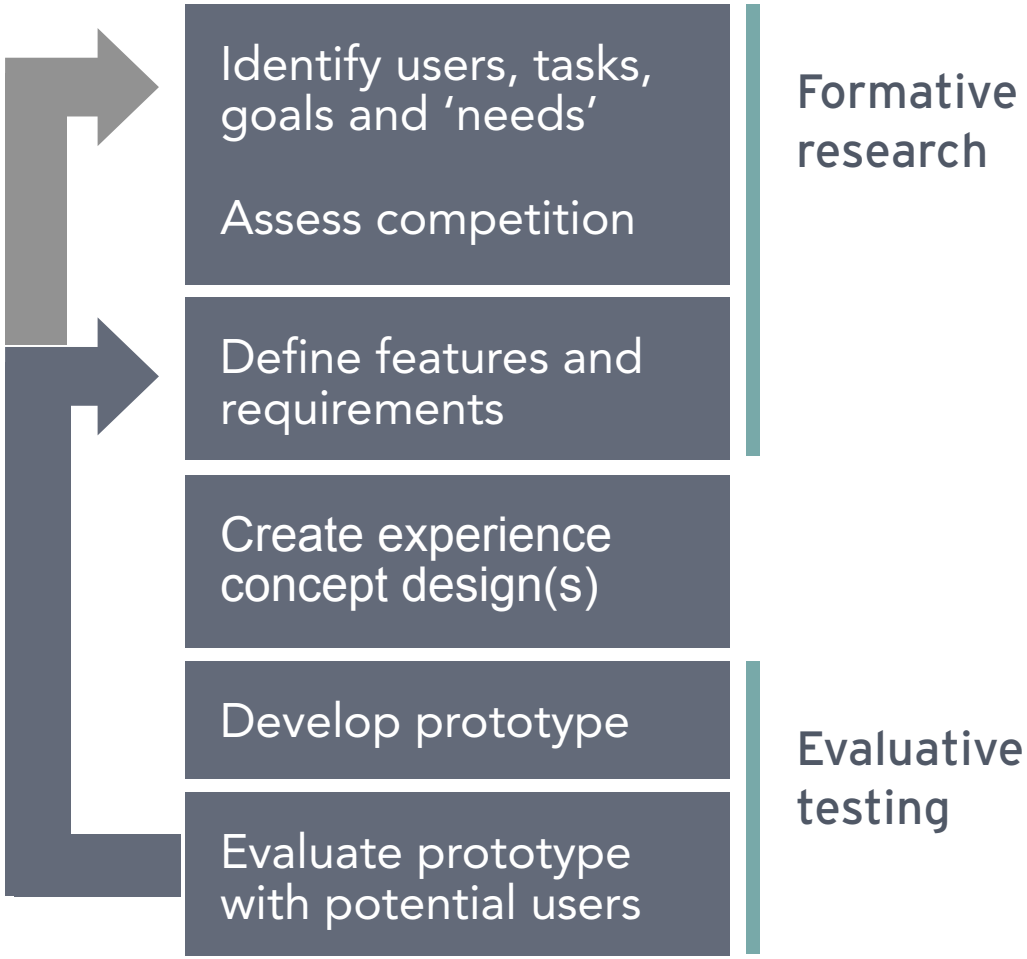
http://en.wikipedia.org/wiki/Waterfall_model

A more research-oriented iterative cycle



Formative versus evaluative research

Where are you in the process?



Outcome: communication

Before research identifying stakeholder goals and constraints

During research reporting initial results and building empathy

After research is completed:

writing requirements, feature documents, use cases, personas, and scenarios

building empathy for ‘users’ among designers/builders

representing user perspective to decision-makers

Personas

Flickr photo by Canned Tuna

Usability test observation

Flickr photo by spcoon

Outcome: collaboration

Stakeholder “ride-alongs”

Interdisciplinary team workshops

Contributing design proposals

Part III

HOW TO PLAN RESEARCH

Why do you need a plan?

As a blueprint

As a communication vehicle

To line up resources

To work systematically while accommodating change

What's in a research plan?

Specify goals

- Research purpose/background
- Problem statement/questions
- Participant profile

Set expectations

- Methods
  - Techniques
  - Personnel
  - Resources required

Set schedules and responsibilities

  - Schedule
- Budget

Specify outcomes

- Anticipated outcomes

Rubin, Ch. 5

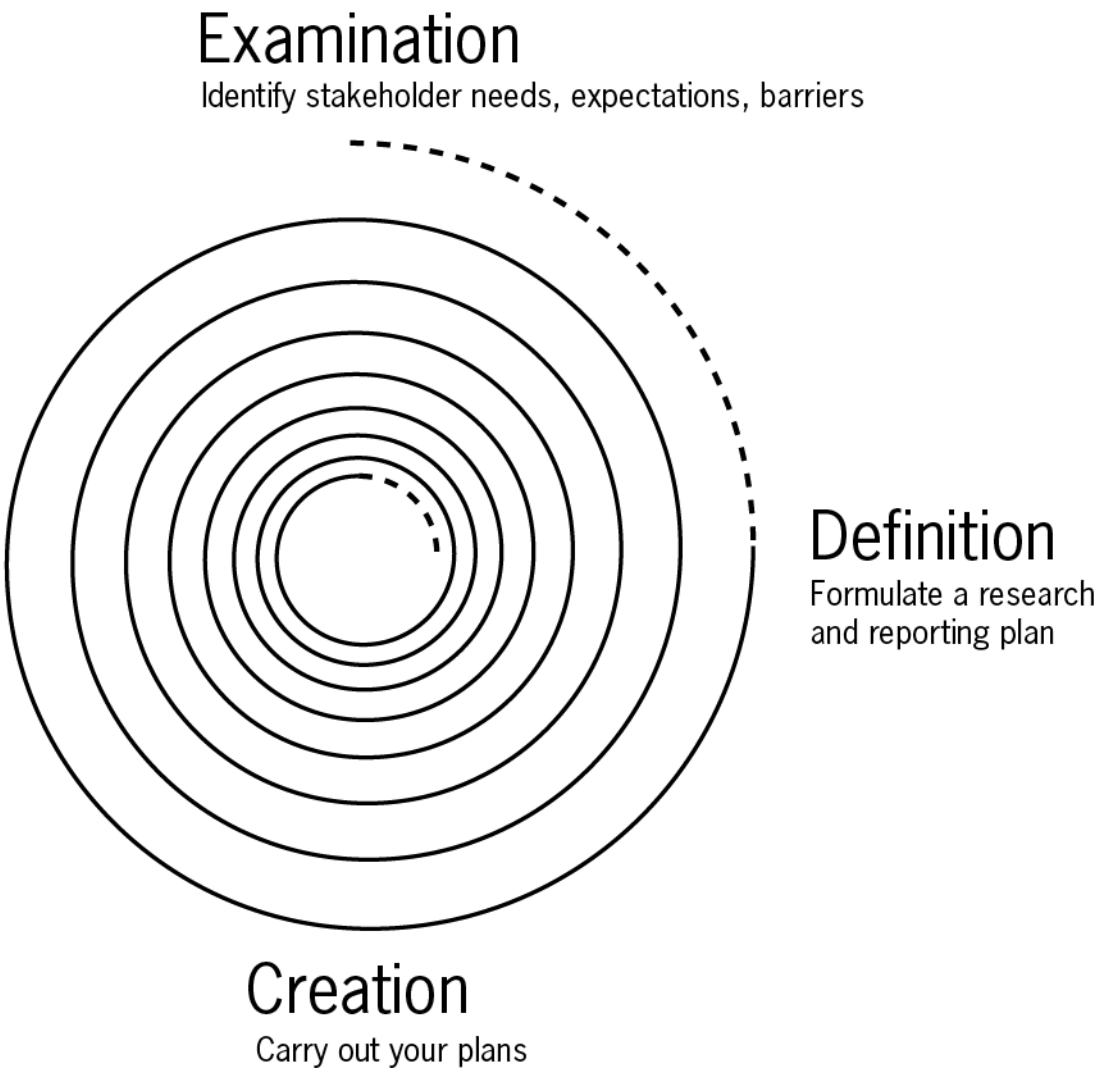
OUE, Ch. 4

How to make a plan

1. Identify stakeholders
2. Collect issues
3. Prioritize them
4. Rewrite them as questions
5. Generate research activities to answer them
6. Identify necessary resources for activities
7. Make a schedule

User research: a double process

Treating stakeholders as users



Identify stakeholders

Who makes decisions?

Who pays the bills?

Who understands how the organization works?

Who understands how the market works?

Who will succeed or fail based on this project?

"Whoever is the ultimate client, at the end, that's our client, even if we're working with an intermediary client. Then her goals are our goals, which means the end client's goals."

Goodwin, *Designing for the Digital Age*, Ch. 5

Roschuni, Goodman, and Agogino, 2013

Stakeholders

Corporate management
Engineers/developers
Other researchers
Designers
Marketers/Sales
Corporate partners/ vendors
QA

Customers / end users
“Clients”
Stockholders
Advertisers

...what else?

1. Collect issues

Activities

Individual interviews

In person, 1 hour

Group interviews by role

Review previous work

Where do sources agree? Where do they disagree?

Topics

Information needs

Business goals

Current problems/questions

Assumptions (and their bases)

Barriers

Fears and risks

Sources of resistance to research

Cultural norms

Expectations for research

Communication preferences

What triggers conflict?

OUE, Ch 4 Goodwin, Ch. 5 Roschuni et al, 2013

2. Prioritize

Numeric exercises
Informal discussion
Tagging/sequencing

3. Rewrite goals/themes as questions

First general

Then more specific

Theme	Question

Exercise:
Turn the goal into the question

4. Generate research activities

Theme	Question	Activity

Activity	Themes	Questions

5. Identify necessary resources

Equipment

devices, software, props

Budget

Your time, travel, equipment, recruitment/incentives

Personnel

Translators? Assistants?

6. Make a schedule

Check published estimates

Ask people

Remember your priorities

Part III

RESEARCH ETHICS

A basic list of rights

Participants have a right to:

Informed participation

Refuse recording & sharing

A comfortable experience

Respectful treatment

Anonymity

Withdraw without penalty

Research clients have a right to…

Valid and reliable analysis

Truthful self-portrayal

Lawful conduct

Adapted from Courage and Baxter, Ch 3

UPA Ethical Principles

Act in the best interest of everyone

Be honest with everyone

Do no harm and if possible provide benefits

Act with integrity

Avoid conflicts of interest

Respect privacy, confidentiality, and anonymity

Provide all resultant data

http://www.usabilityprofessionals.org/about_upa/leadership/code_of_conduct.html

One workplace study's guidelines

The performance of any test participant must not be individually attributable.

Individual participant's name should not be used in reference outside the testing session.

A description of the participant's performance should not be reported to his or her manager.

CPHS: Definition of private information

Private information includes information about behavior that occurs in a context in which **an individual can reasonably expect that no observation or recording is taking place**, and information which has been provided for specific purposes by an individual and **which the individual can reasonably expect will not be made public** (e.g., a medical or school record). In order to meet the above definition**, private information must be individually identifiable** (i.e., the identity of the subject is known or may readily be ascertained by the investigator or associated with the information) in order for the investigation to constitute research involving human subjects. In general, private information is considered to be to be **individually identifiable when it can be linked to specific individuals by the investigator(s)** either directly or indirectly through coding systems, or when **characteristics of the information obtained are such that by their nature a reasonably knowledgeable person could ascertain the identities of individuals.**

Summary of guidelines

Professional ethics

- Harm no one
- Maintain confidentiality/ anonymity
- Avoid conflicts of interest

Law

- Respect public/private places: “Reasonable expectation of privacy”
- Don’t imply endorsement
- Copyright

Campus CPHS/IRB

- Be especially careful with identifiable info
- Avoid coercion (e.g., power, payment)
- Protect vulnerable populations
- Adhere to their approval mechanisms
- Get written consent (to participate) and release (for use of media)