



# Research in the Time of COVID-19

Lauren Isaacson

Founder and Research Director at Curio Research





# THIS SUCKS

But we're all in the same boat

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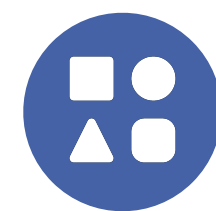
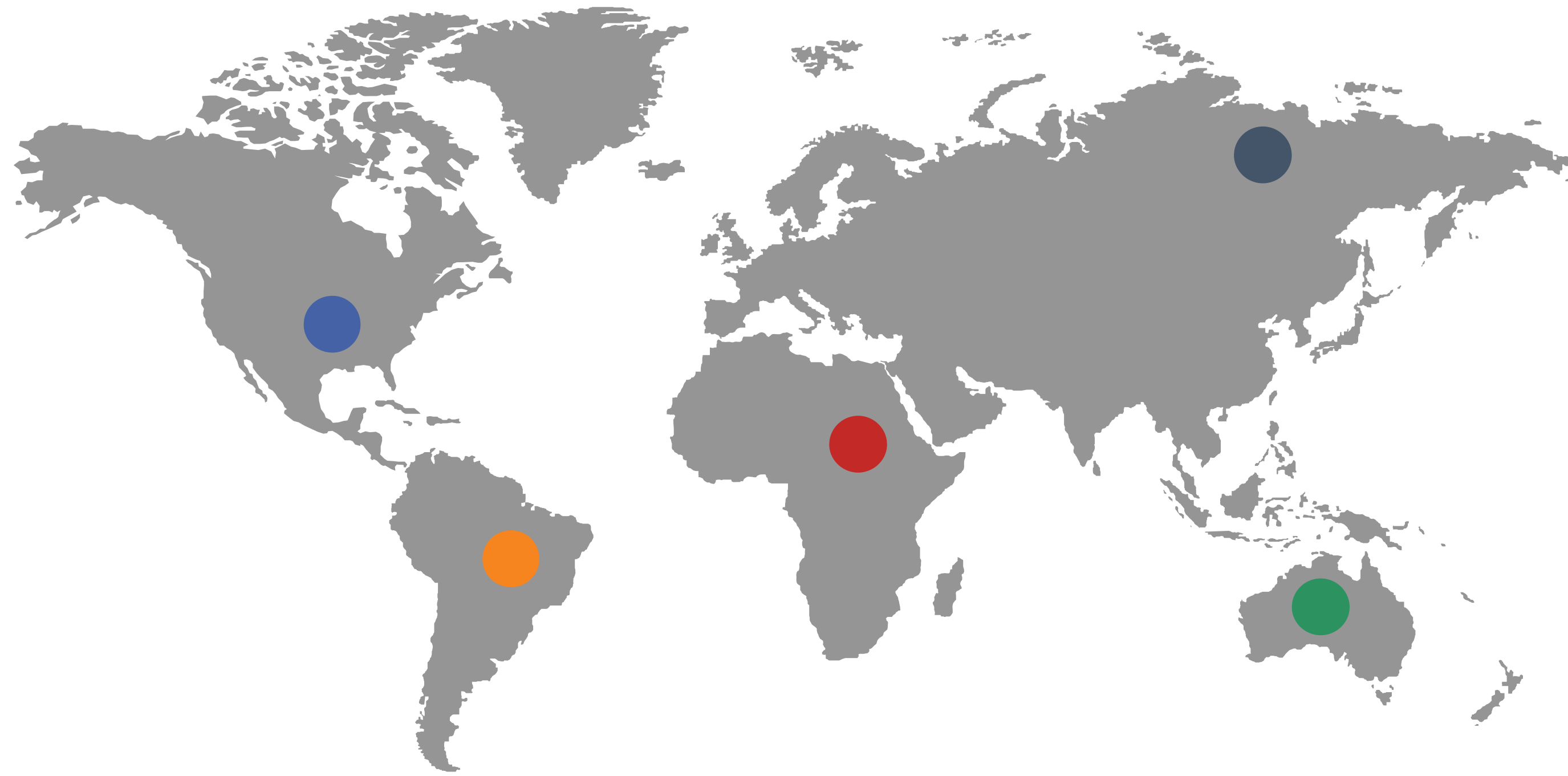
# Advantages/Disadvantages

Nothing is perfect



# Increased Participant Diversity

You're not limited by geography



## Location variety

They don't have to live near the office for the facility.



## Timing flexibility

Make time zones work in your favour.  
Their evening can be within your 9-5.



## Easy participation

No commute. Just a computer and an internet connection is required.



## Get hard to reach people

Doctors, lawyers, executives, etc. will be much easier to recruit if they don't have to come to you.





Photo by Elevate on Unsplash



Photo by Nathan Anderson on Unsplash

# Increased Accessibility

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People who would find it physically impossible or difficult to participate in your research in-person, can probably do so remotely.

You've effectively lowered a barrier to participation, but you still have to make sure they have everything they need and you need to make it work.



Photo by Elevate on Unsplash



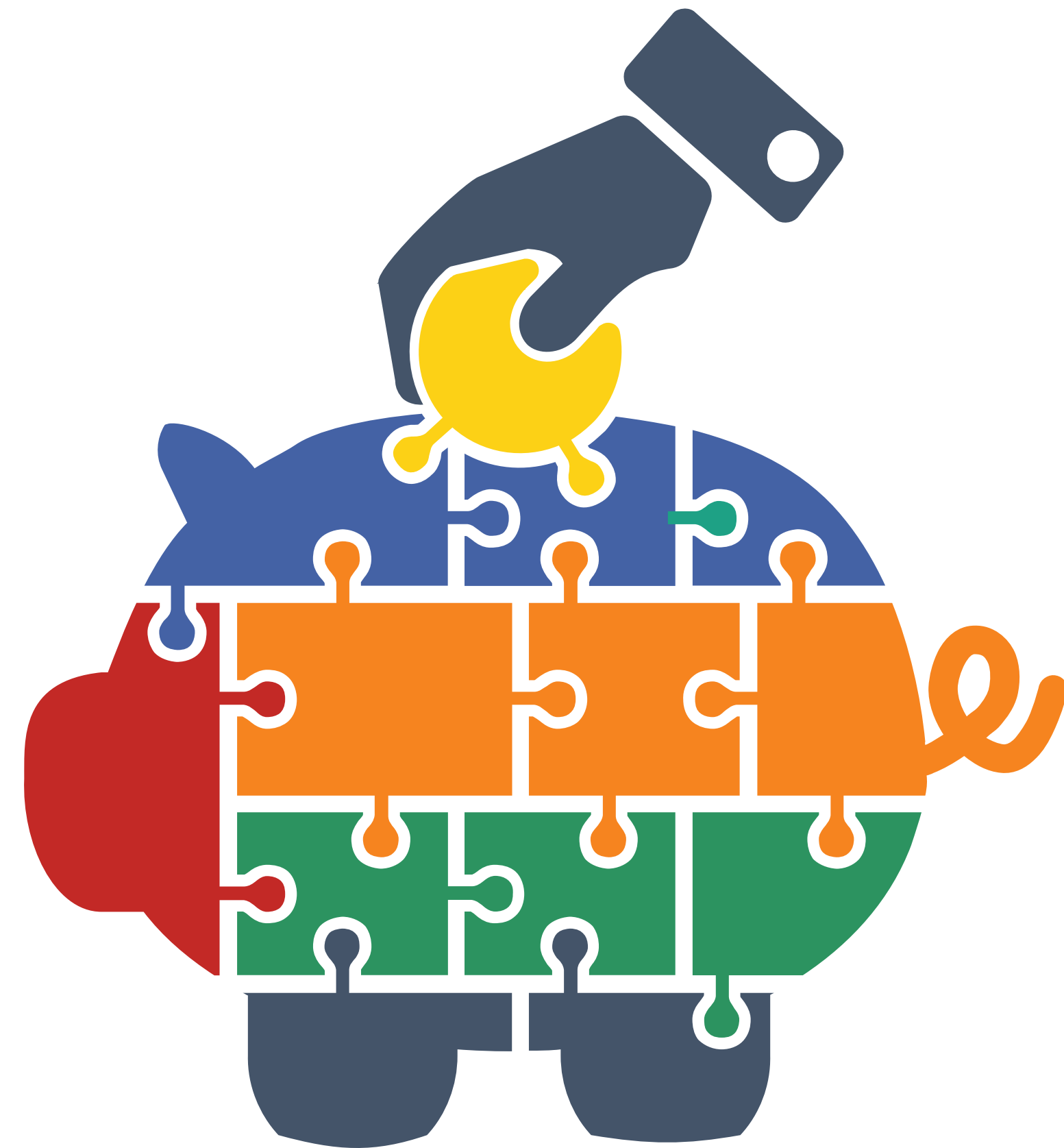
Photo by Audi Nissen on Unsplash



# Save Money

In-person is expensive

- ✓ **Travel**  
No need to pay for flights, cars, hotels, and meals on the road.
- ✓ **Facilities**  
Don't spend money on a space to conduct the research.
- ✓ **Tech support**  
No technicians needed to capture video or provide a temporary lab.
- ✓ **Time away from the office**  
Less lapsed meeting and project schedules.





# Save Time

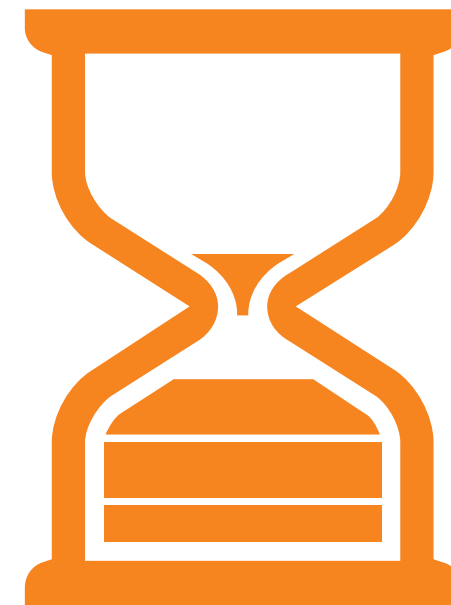
Only spend time on the research

## Traveling



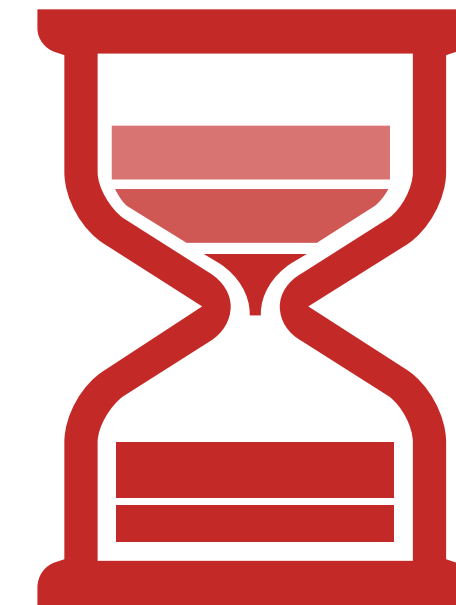
Less time spent in planes, trains, and automobiles.

## Coordinating



No time spent on finding and coordinating facilities and service providers.

## Missed Opportunities



You can now attend those really important meetings without skipping a beat on your research schedule.



# There are no secrets

Sure, you can have participants sign an NDA before the session, but if you find yourself in a position to enforce an NDA then it's too late. The cat's out of the bag.

If it really must be kept a secret, white label what is being tested or save it for when you can test in-person again.





# Losses and Gains

Exchange revealing body language for comfort and tone

## Challenges

You have to deal with technical challenges and lags.

You lose the ability to read body language.

You have less control over their environment.



## Advantages

You pay more attention to the subtleties of facial expressions and vocal tone.

It's easier to discuss sensitive topics when participants are in the comfort of their homes.



# Setting up your lab

You don't need much to make it work

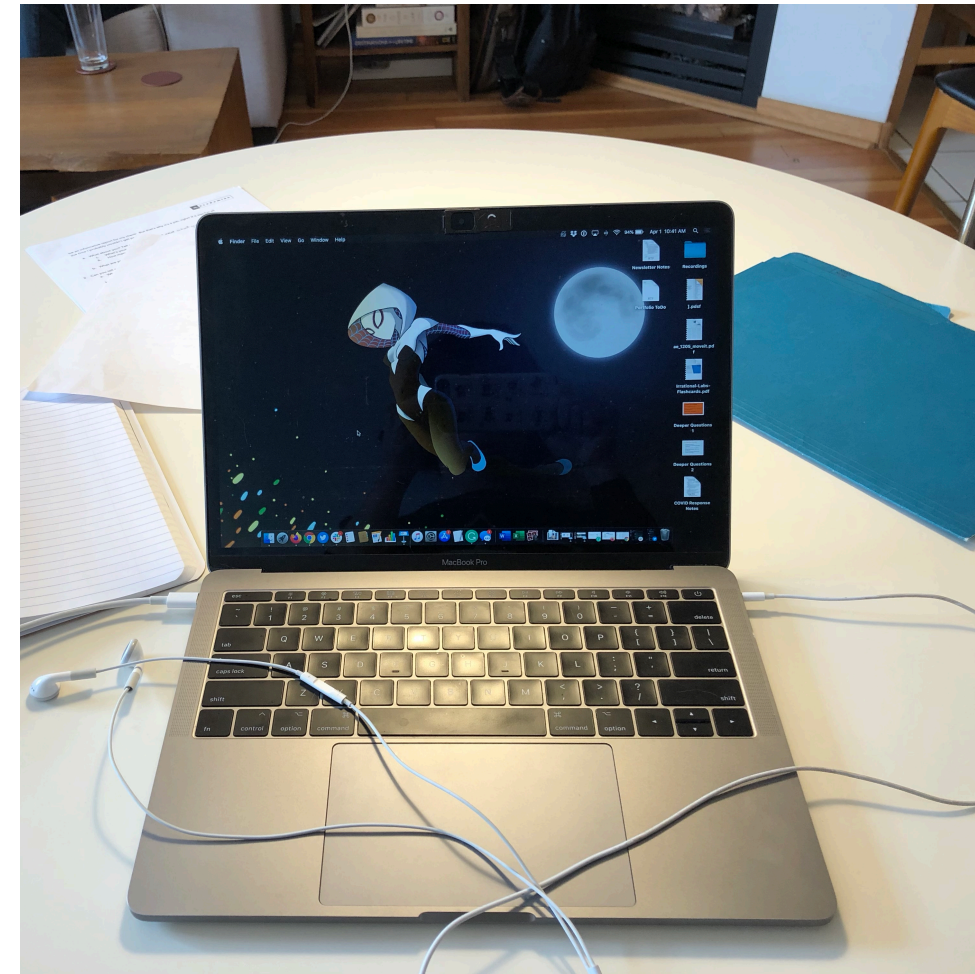
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# This is My Home Lab

It looks simple because it is

What  
participants  
see



What I  
see









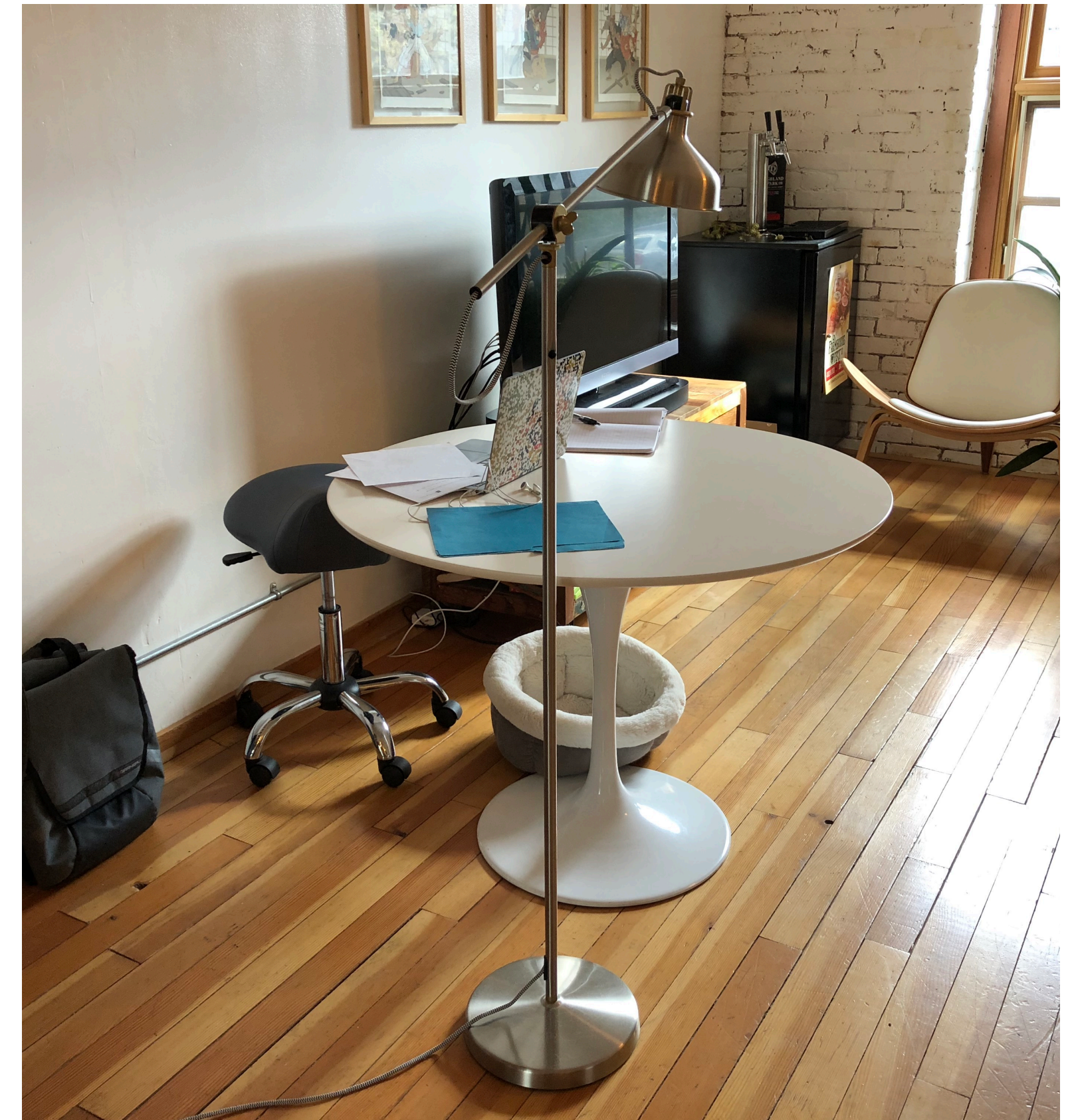
# Elements of a Home Research Lab

## The checklist



### Quiet space

Get the clarity of your voice with minimal background noise.







# Live with people? Negotiate a schedule

Teamwork makes the dream work.

Negotiate a schedule with the people you live with.

- Work your availability windows around their can't miss meetings.
- Ask them to move the meetings that can be moved.
- Post a schedule showing when you need quiet time or share a calendar they can view.



# Take a tip from radio producers: Use spaces with soft surfaces

People who do VoiceOver work or produce podcasts will use a clothes closet when they're having to record from home or on the road.

This is probably not a realistic option for most researchers, but think about soft surfaces when choosing your research space.

- Carpets
- Blankets
- Towels







**Do not  
disturb**

## Have some kind of sign or signal showing when it's research time.

Tape a Do Not Disturb schedule to the door.

Use a door hanger.

Get creative.



# Elements of a Home Research Lab

## The checklist



### Quiet space

Get the clarity of your voice with minimal background noise.



### Table

Whatever you can get, but being able to spread out is nice.





# Elements of a Home Research Lab

## The checklist



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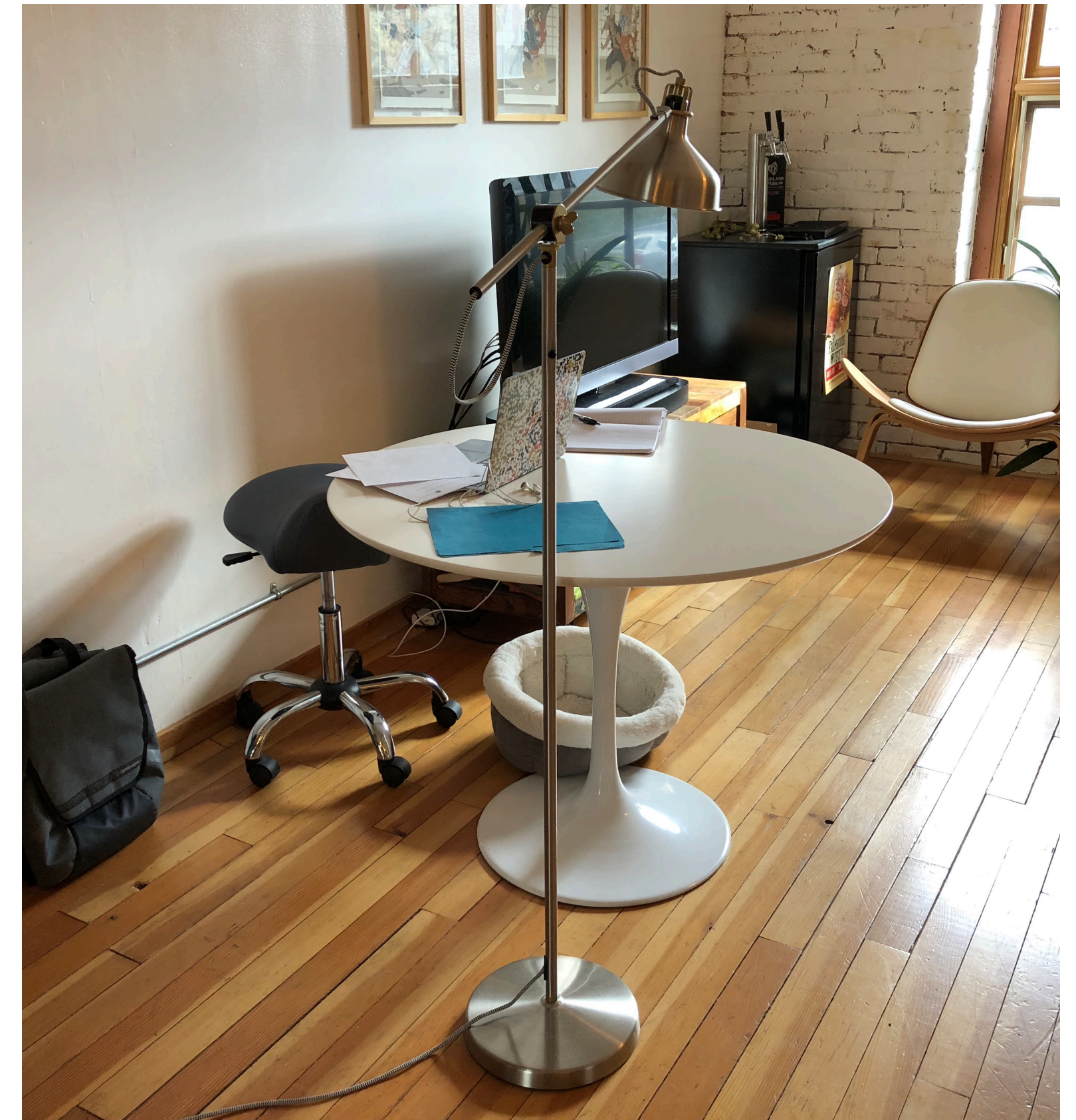
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### Chair

You'll want to be comfortable for back to back sessions.





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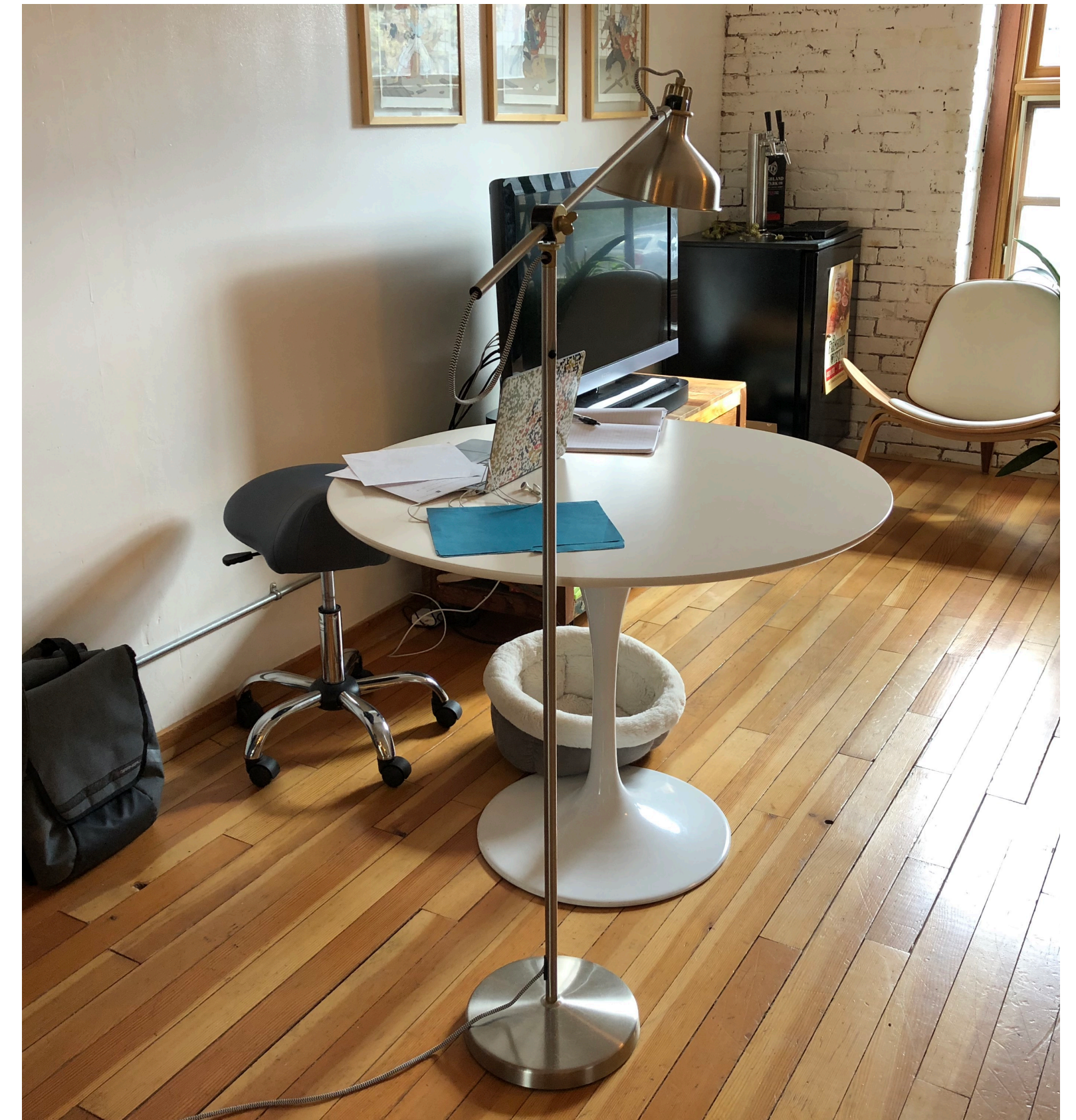
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### Neutral background

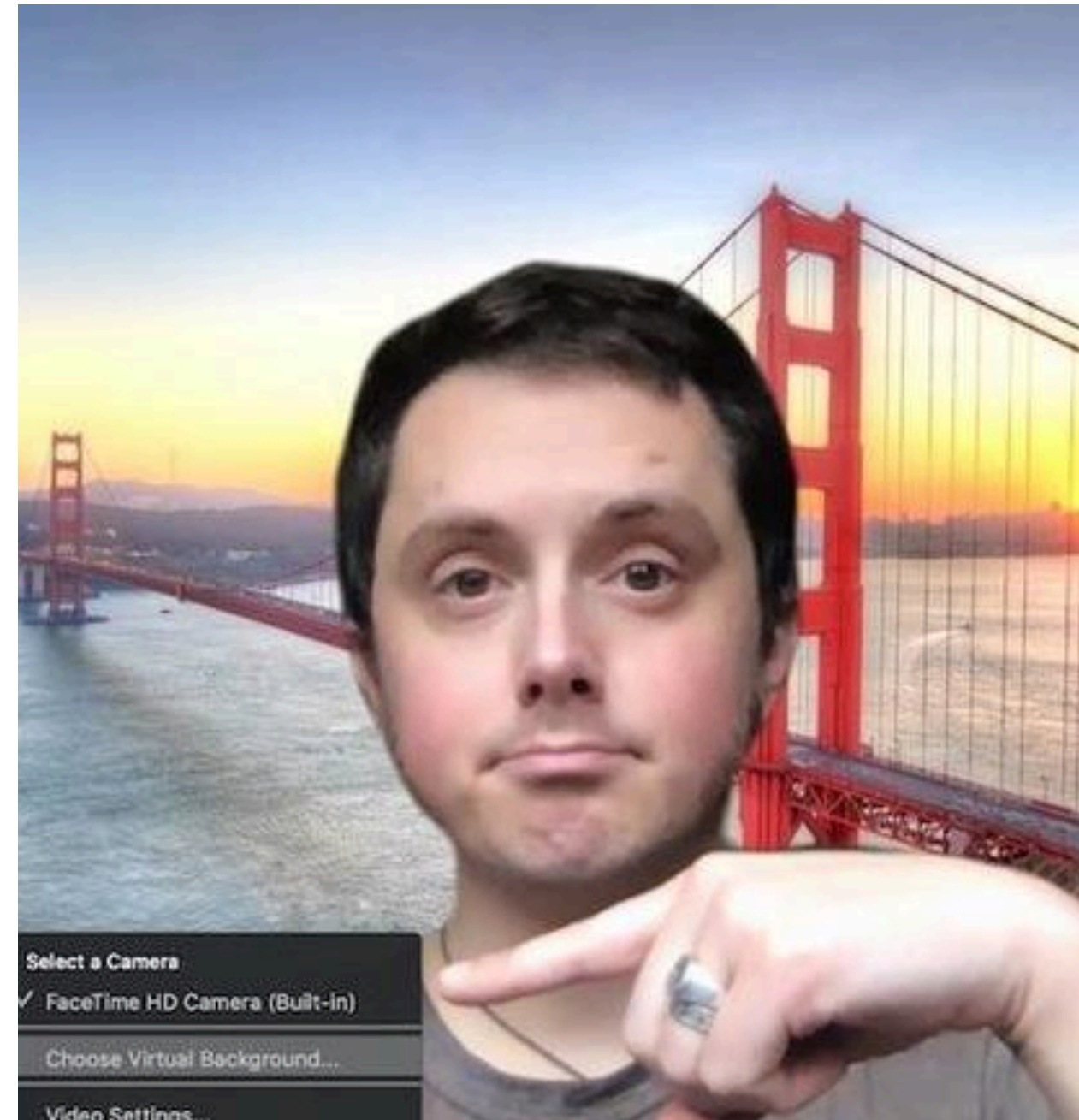
Doesn't distract and doesn't reveal.





# Neutral is best

Be boring



When you use a plain background, you give participants the ability to focus on the task at hand and project whatever they want onto you.

Ideally, you want participants to think you're just like them.



# If you don't have a blank wall, fake it

Limit distracting backgrounds with sheets, or a green screen that stands on its own or clips to the back of your chair.

It doesn't even have to be green.





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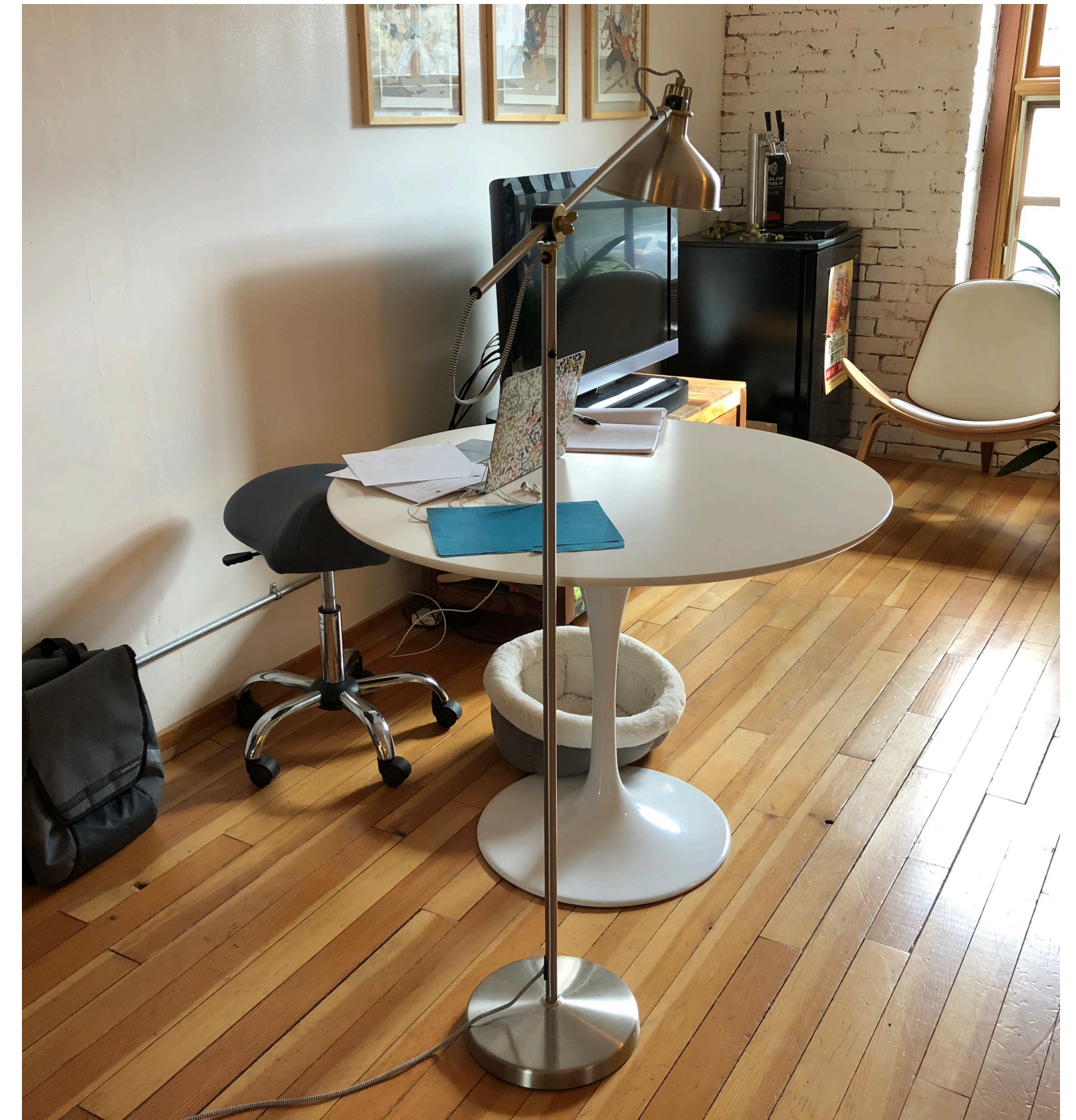
### Neutral background

Doesn't distract and doesn't reveal.



### Laptop with camera

Good processor speed is helpful. You can also use an external camera.





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## The checklist



### Quiet space

Get the clarity of your voice with minimal background noise.



### Earbuds or headset with mic

Minimize background noise and distractions, and be heard clearly.



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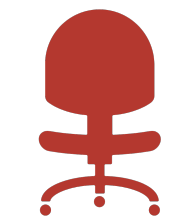
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### Power source

Avoid a 10% battery warning in the middle of a session.



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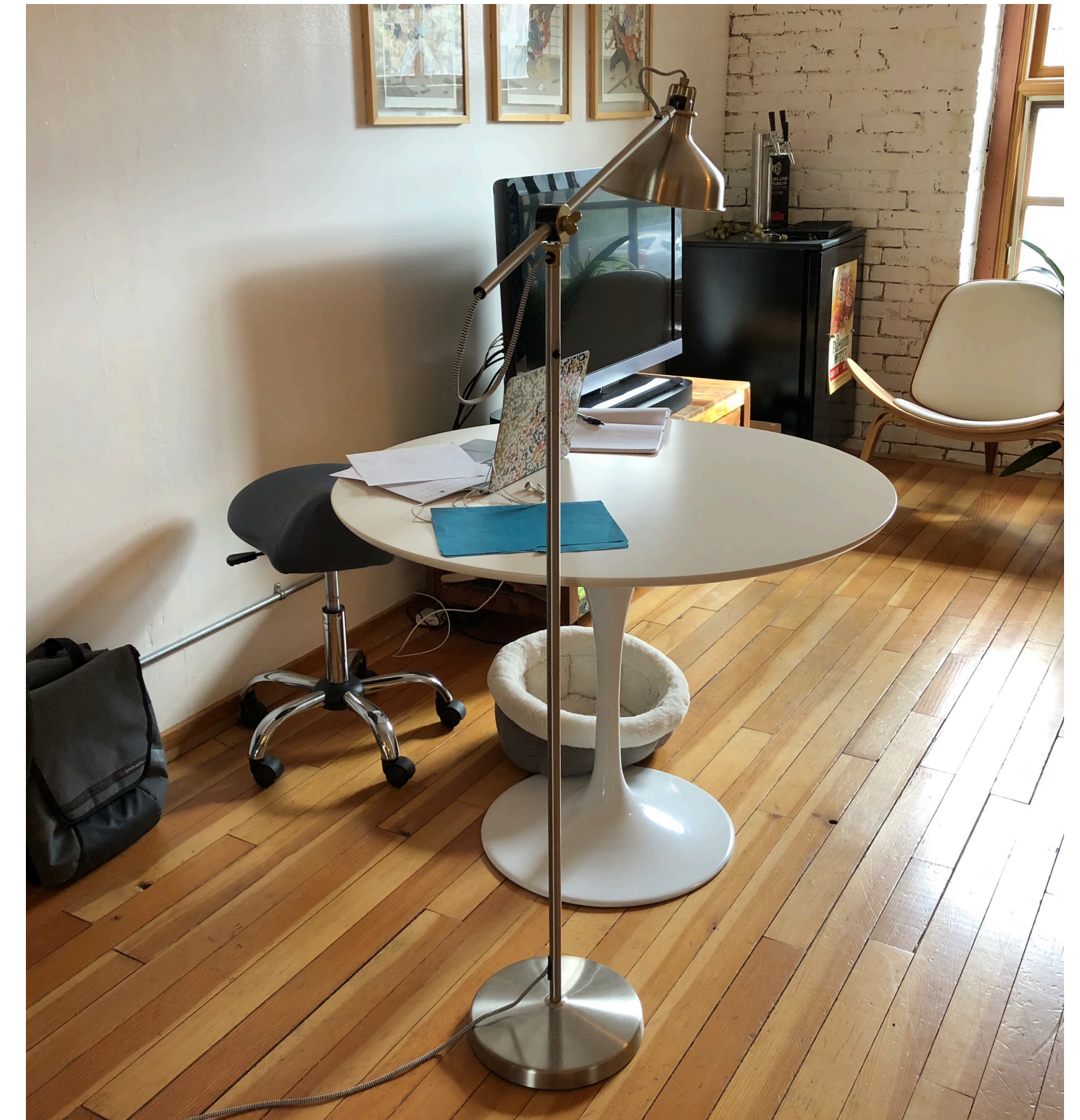
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### Notepad

Take notes without the clickety clack of a keyboard.





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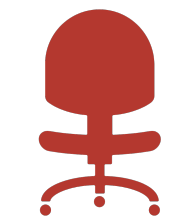
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### Pen

Something that writes smoothly and won't let you down.





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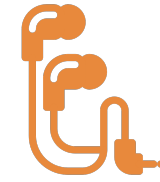
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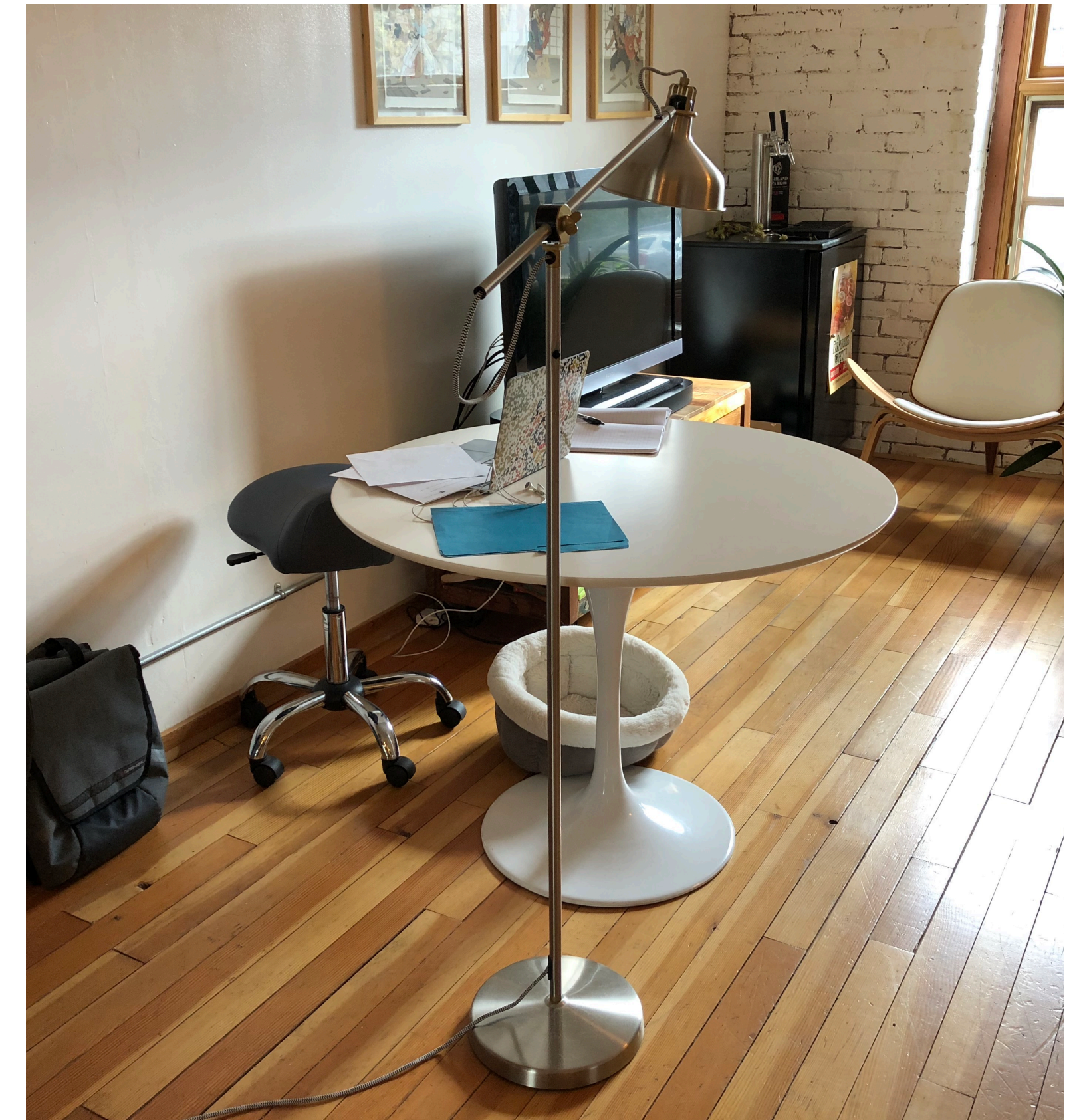
### Pen

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### Lamp

Don't underestimate the power of good lighting.





# Who is your research wingperson?

A lot can go wrong in setting up a session. A support buddy can help make sure things go right and handle the parts that don't.

A wingperson can take care of all the little things so you can stay in the research zone:

- Is your video connection okay? Are you ready? They can check.
- Did your participant not show up or try to connect at the wrong time? They can call them.
- Are your observers having trouble connecting? They can handle it.

Sometimes these tasks can be handled by the tech support team of the software you're using or the recruiter supporting your project.



# Everyone gets participation instructions!

Don't assume people know how to join you online.

Provide instructions for:

- The researcher
- The participants
- The stakeholders

Instructions should cover:

- How to join and if they need anything prepared in advance
- Expectations and appropriate behaviour
- Who to contact if they need help





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# Have a plan B

Accept Murphy's Law. At least one thing will go wrong during the session.

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# Technology options

Choosing the right tool for the job



# Tool Selection Comes Last

Define your research first





# Platforms

Simple to complicated

## Meeting Software

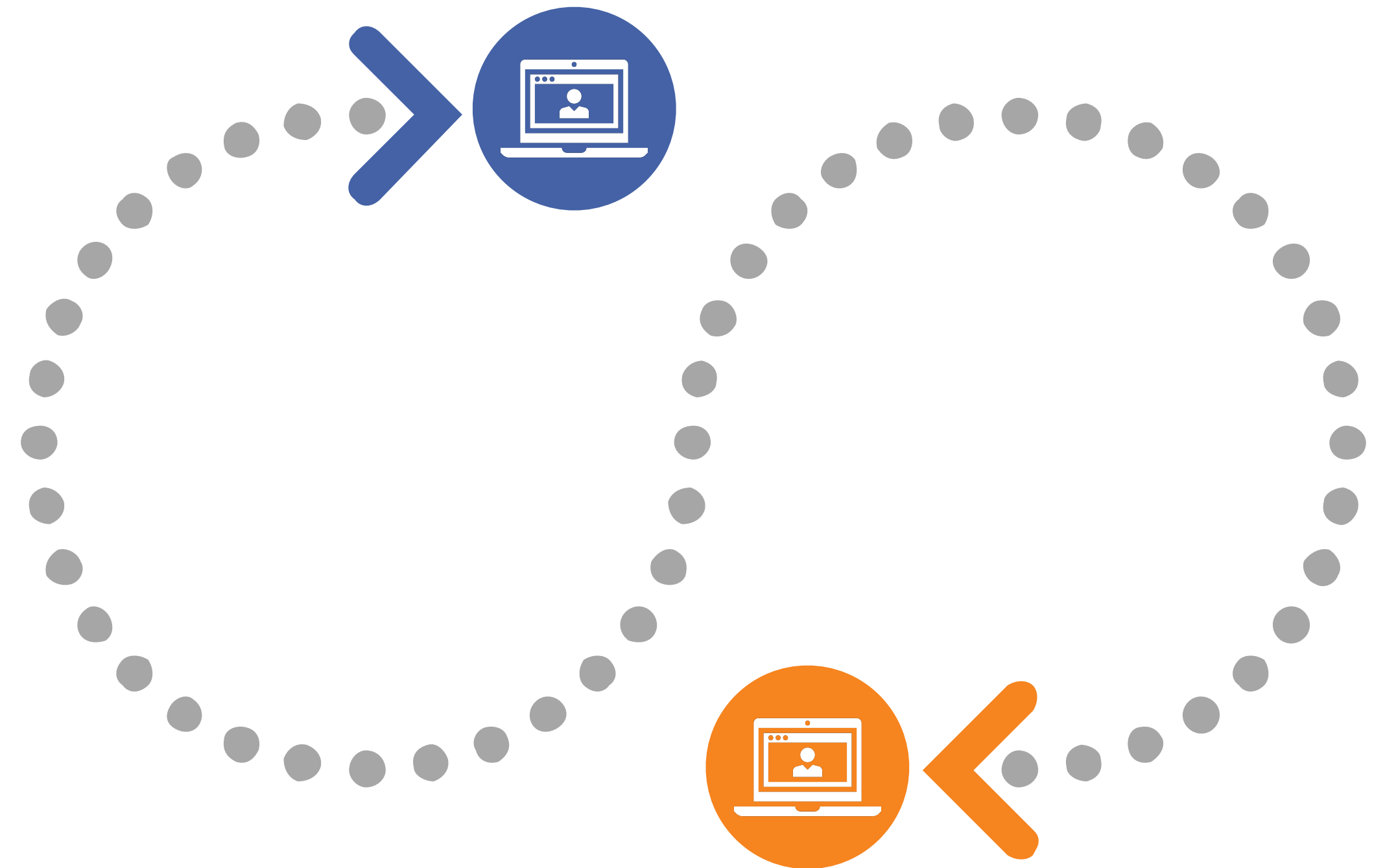
We're all familiar with these. We use them all the time.  
Especially now.

But they're not built specifically for research and they require some finesse to make work for our purposes.

## Research Software

These help manage the participants and the clients/stakeholders and provide features to make the research process easier. There are different types of services depending on your needs:

- Usability testing
- Interviews
- Focus groups
- Bulletin board focus groups
- Chat/text-based focus groups
- Digital ethnography/diary studies
- Eye-tracking
- Facial coding
- Dial studies





**Moderator View**  
Support ID:0001C-008B4-014GV

DISCUSSION | PROFILE LIST | MY PROFILE | USERS | REPORTS

**Matthew**  
PARTICIPANT

RECORDING 00:34:30

**MODERATOR GUIDE**

-- No Whiteboard --

**Questions**

- What is does a typical morning routine look like for you?  
✓ Mark as Finished
- What type of food do you eat?
- Tell me more about the breakfast sandwiches and bagels.
- Where do you purchase the frozen breakfast sandwiches and bagels?
- Tell me about how you purchase breakfast foods.
- Do you purchase your food directly from the store or online? Do you ever research
- Can you go to the site: <https://starthealthyfoods.com/>
- Please share your thoughts about the website.
- Next I am going to share a package concept in the whiteboard area of the software.
- Sleeve exploded view.png

**USER LIST**

**PARTICIPANT CHAT** 1

**BACKROOM** 2

Stop Recording End Group

Version: 2.5.7 Terms of Service

# In-Depth Interviews

Meeting software built for research

- 1 participant at a time, or 2 for dyad studies
- Can use video or phone
- Provides a virtual backroom for stakeholders
- Technical support and communication scheduling
- Show multimedia stimuli
- Program your guide into the interface



# Usability Testing

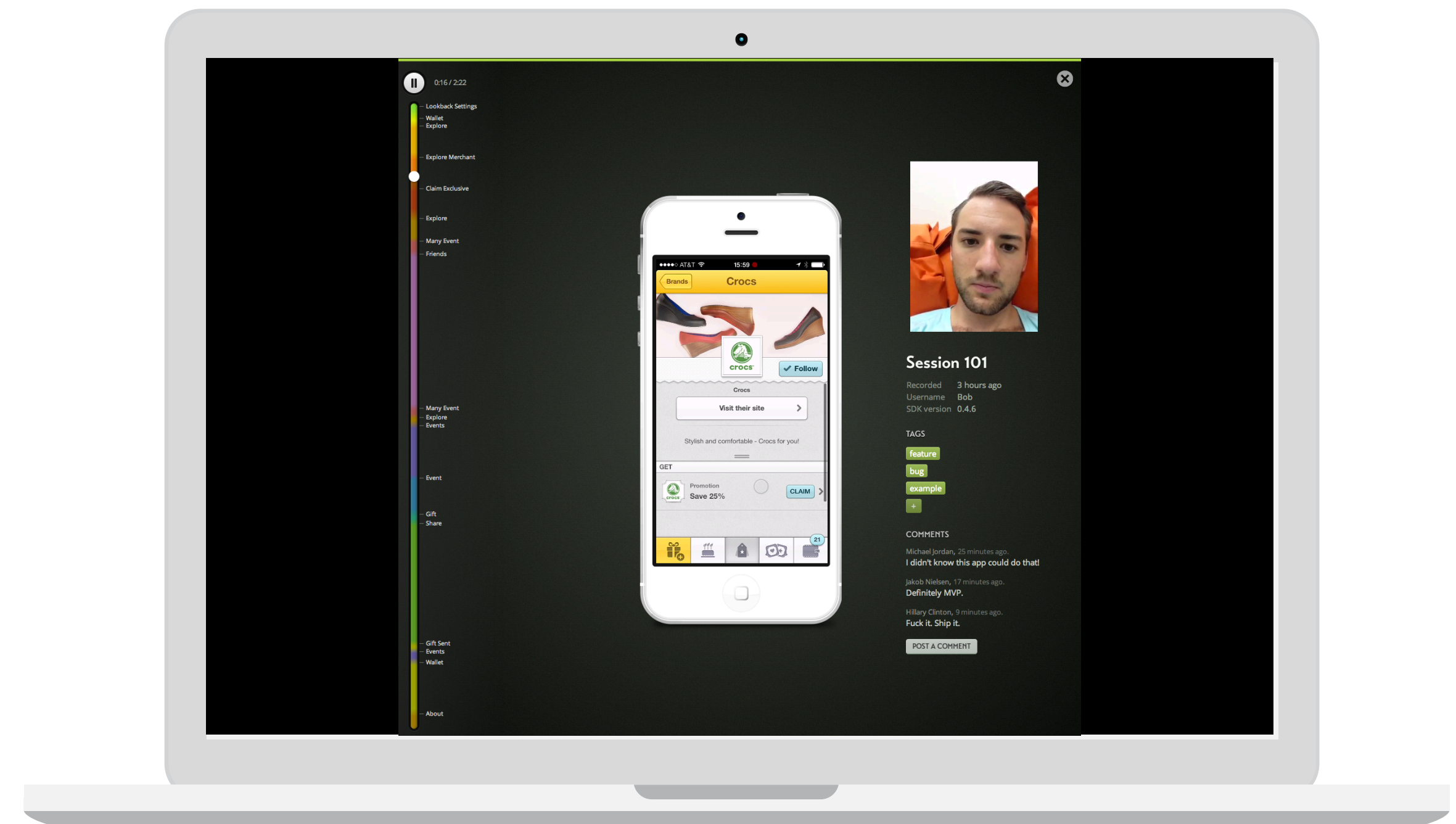
Moderated and unmoderated options

## Moderated

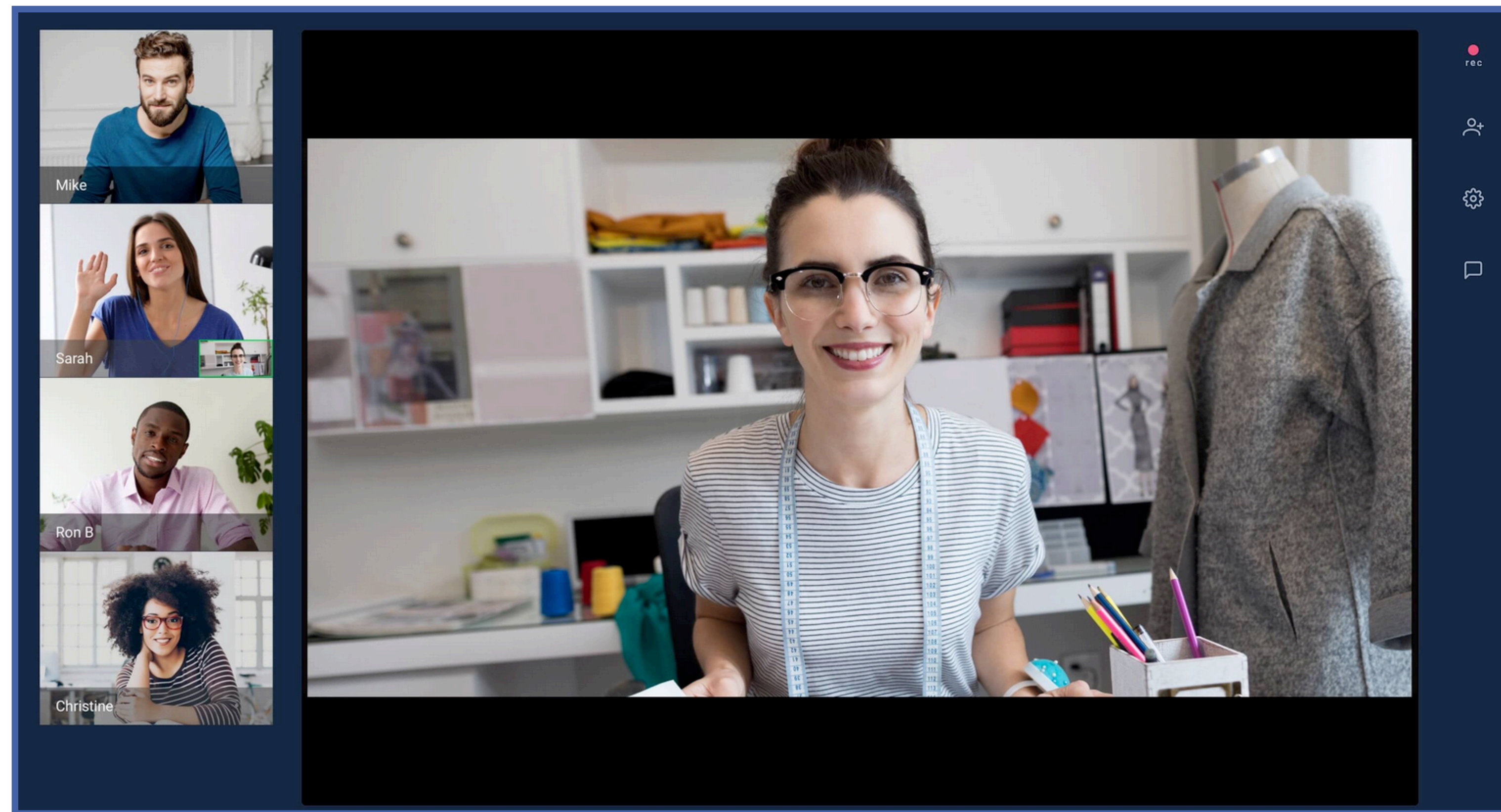
- A lot like IDI software, but built to test interfaces and online prototypes.
- Streamlines the testing process from recruiting to analysis.
- Can do desktop or mobile, but not at the same time.

## Unmoderated

- Great for small and self explanatory interactions.
- Easy and fast, but the task requests need to be carefully worded to avoid confusion without a moderator present.





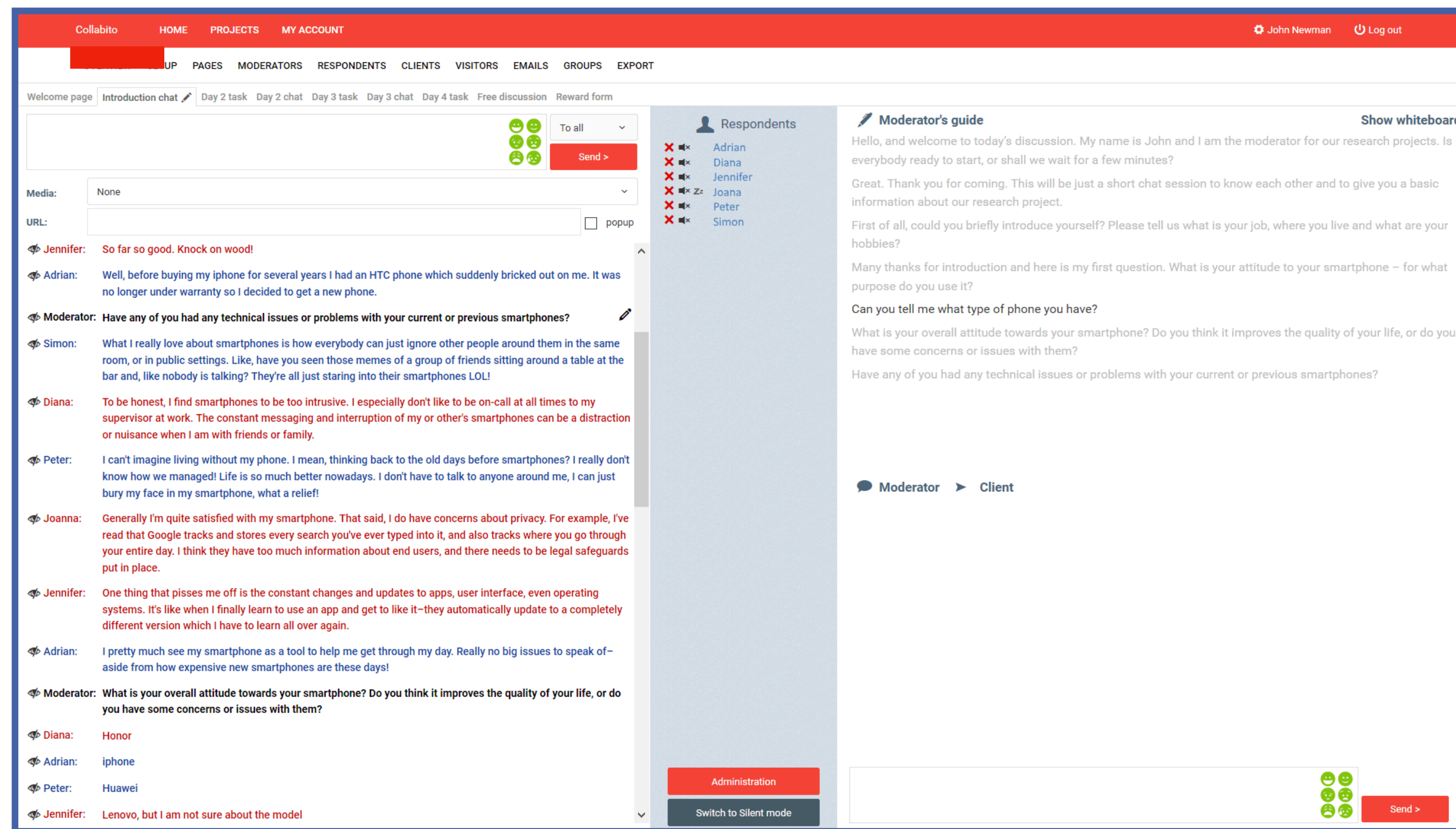


# Video Focus Groups

Meeting software on steroids

- Can accommodate 5 -6 participants
- Provides a virtual backroom for stakeholders
- Technical support and communication scheduling
- Show multimedia stimuli and provide makeup capabilities without having to switch systems
- Program your guide into the interface



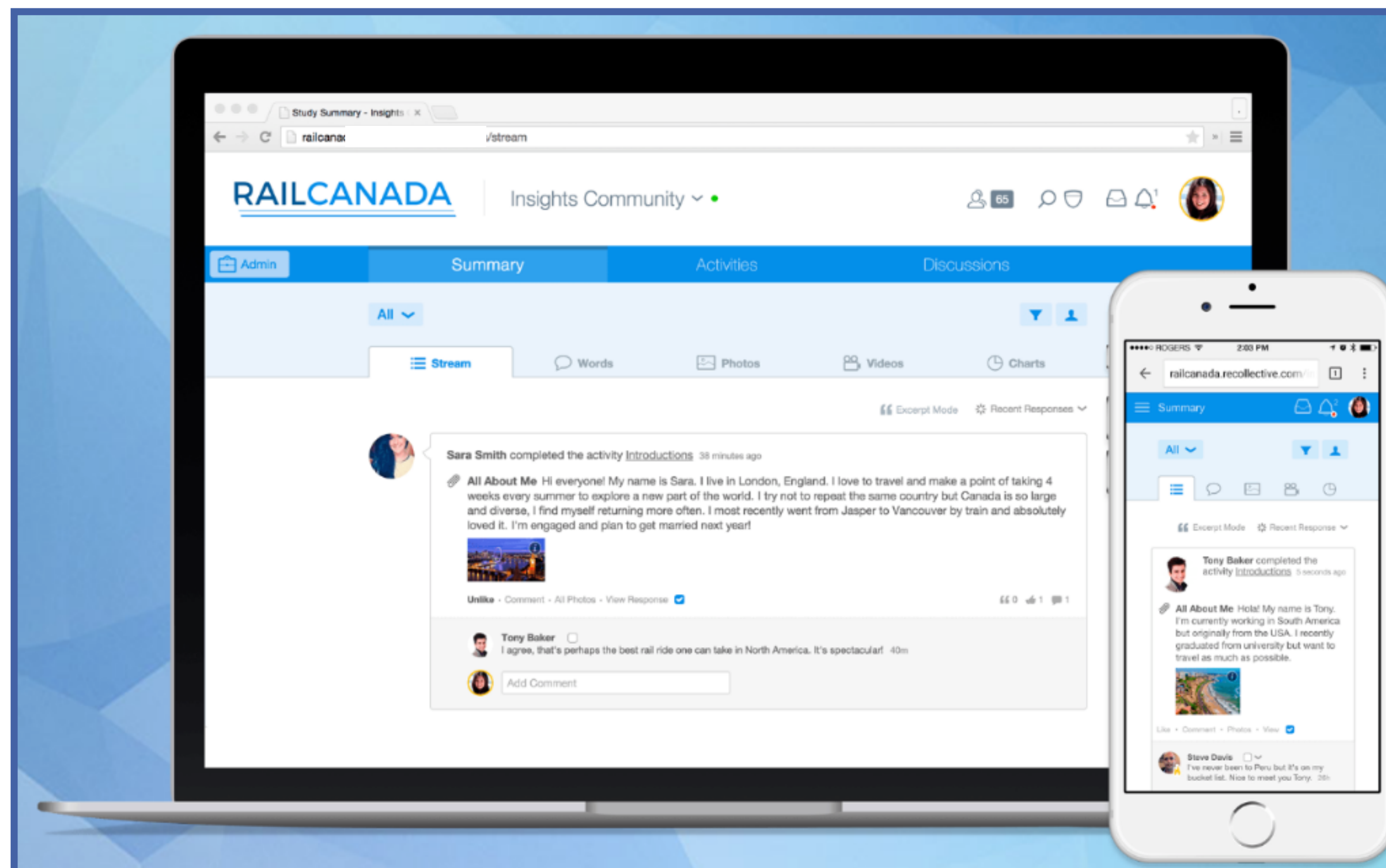


# Chat/Text-based Focus Groups

For quick, surface level insights

- Can accommodate 8 participants or more
- Provides a virtual backroom for stakeholders
- Technical support and communication scheduling
- Great for when you need fast insights from a number of people. Synchronous.
- Can also use WhatsApp or Signal for free, but think about the analysis component.



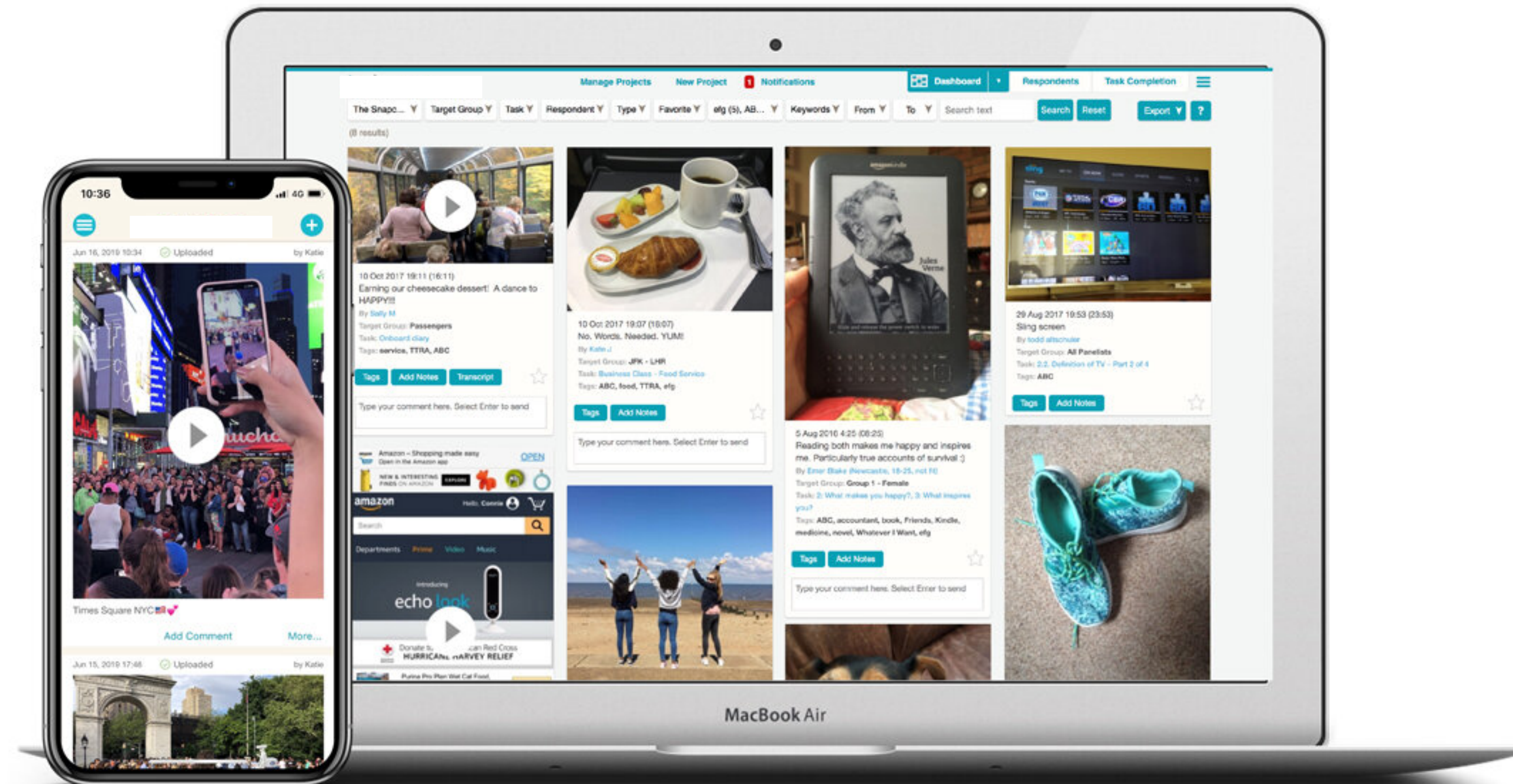


# Online Asynchronous Focus Groups

For insights with breadth and depth

- Can accommodate up to 16 participants over 2 -3 days
- Participants can participate at their convenience and communicate with each other
- Provides a virtual backroom for stakeholders
- Technical support and communication scheduling
- Show multimedia stimuli and provide makeup capabilities without having to switch systems
- Program and schedule your guide into the interface



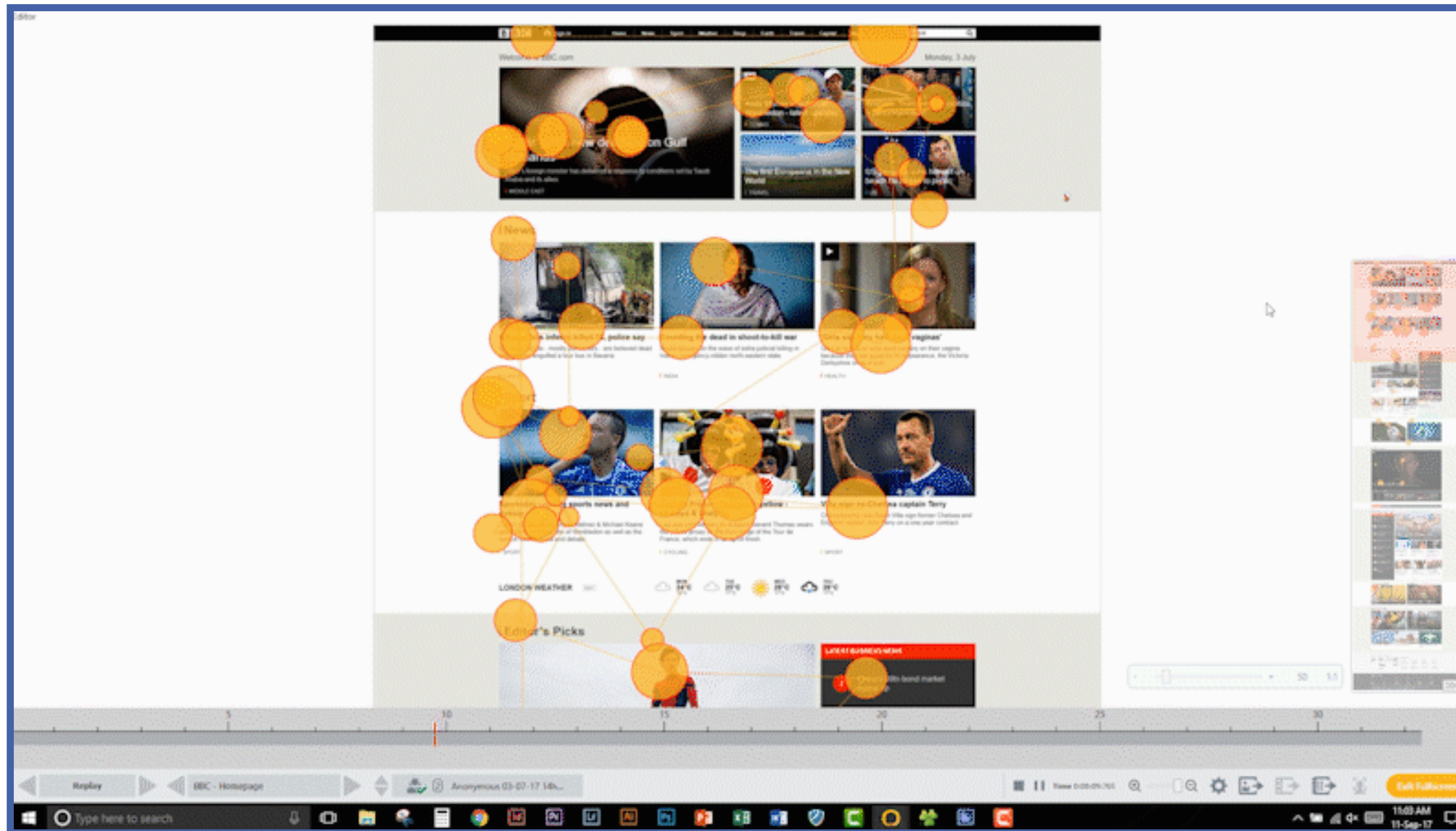


# Digital/Remote Ethnography

Let participants show you how they live

- Can accommodate up to 16 participants
- Provides a virtual backroom for stakeholders
- Technical support and communication scheduling
- Participants can upload audio, video, and pictures of their experiences
- Program and schedule your guide into the interface
- Flexible study length, but incentivize participation



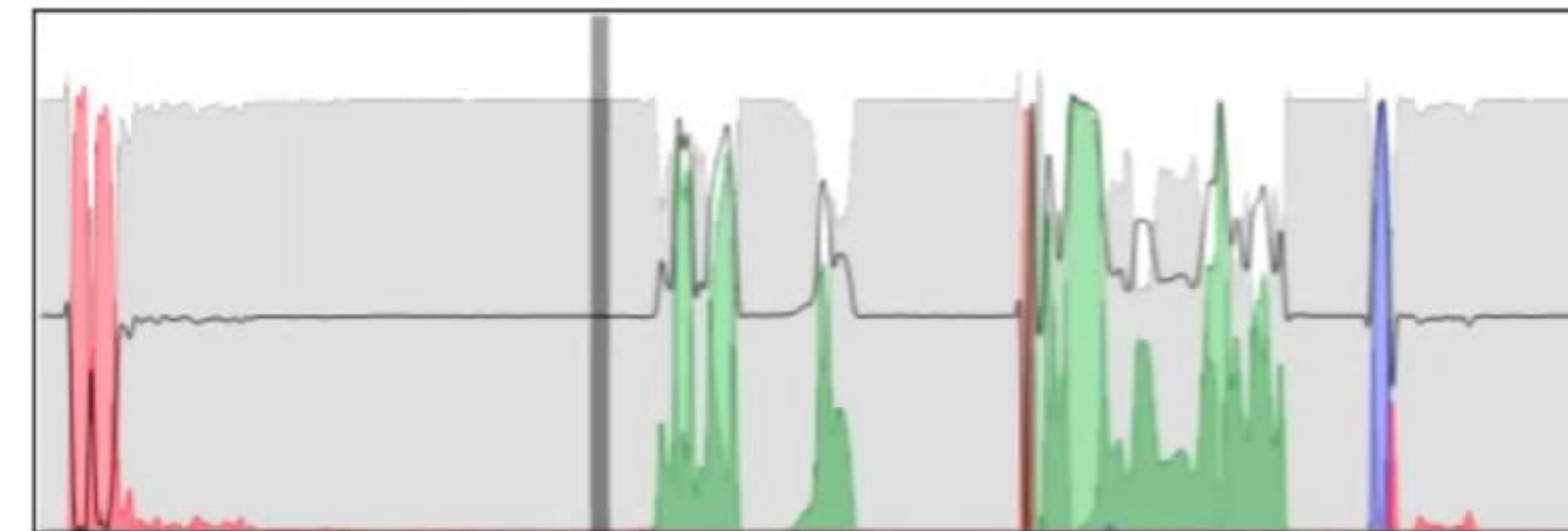


# Eye Tracking

What are they looking at?

- Good for in-depth interviews or unmoderated studies
- Calibrates the participant's camera to track their eye movements
- Be wary of the technical requirements participants need to meet to make the software work on their computers





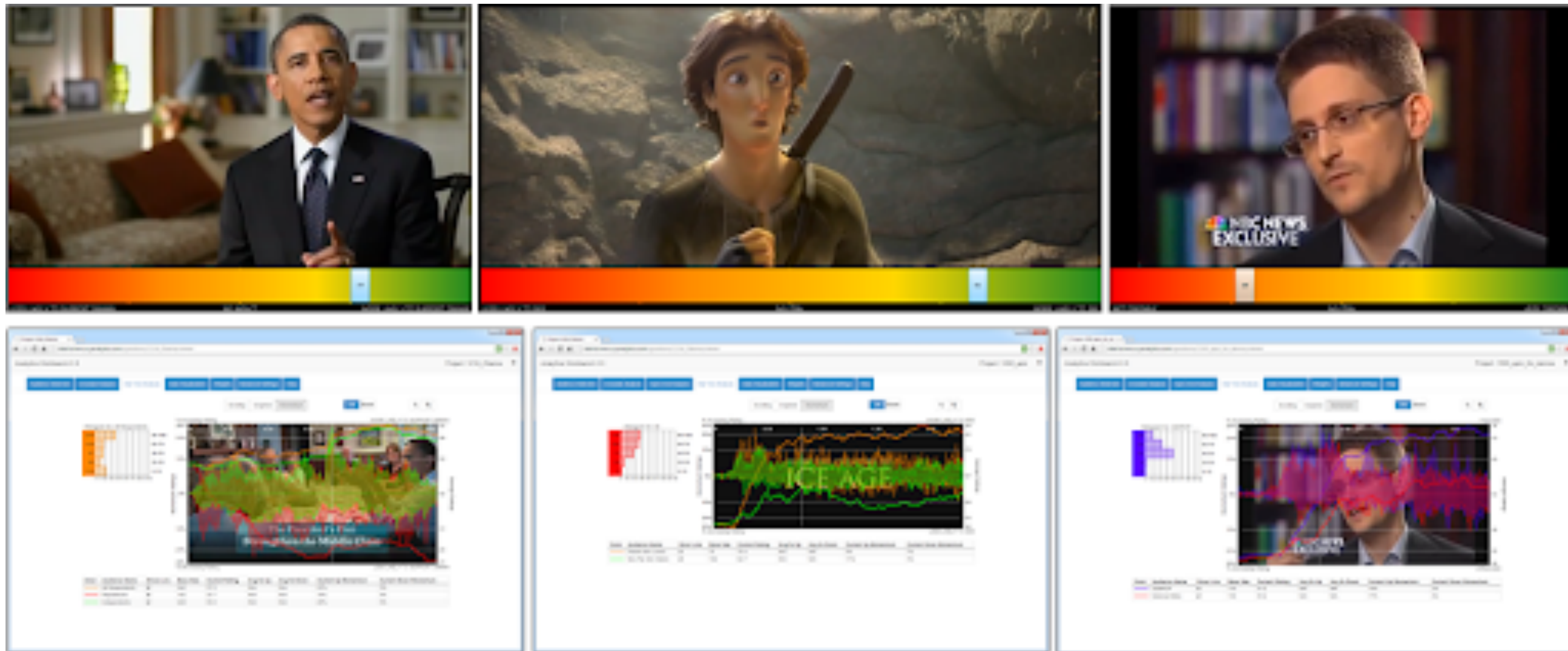
Neutral Happy Heightened interest  
 Afraid Disgusted Surprised Sad

# Facial Coding

How do you REALLY feel?

- Flexible participant counts
- Great for monitoring reactions to video, audio, or motion stimuli
- Uses the participants' computer camera to analyze facial expressions
- Can interview participants post analysis to understand reactions





# Dial Testing

Real time like/dislike rating

- Like facial coding, but more subjective
- Participants self-gauge their reactions to audio or visual stimuli
- Participants can be interviewed later to understand their reactions



# Practice makes perfect

These are tools you've never used before. Don't expect to nail it on your first try.

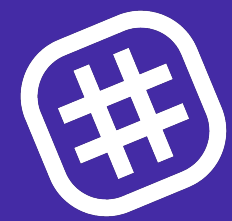
- Ask the platform provider for a walk through and a dry run.
- Get some friendlies to do a test run with you.
- Figure out how this works from your perspective, the participant's perspective, and the stakeholder's point of view to help write the instructions and troubleshoot if necessary.
- For platforms offering automated analysis, ask how to correctly interpret the results.





# Backchannel

For stakeholder buy-in and real-time feedback



**Messaging  
platforms or  
groups**



**Text messages**



**Built-in  
options with  
research  
software**

Making your stakeholders an active element of the research process improves the chances your research will be successful and the resulting insights will be adopted. Give them the ability to point out opportunities for additional probes without interacting with the research participant(s).



# Research on Mobile

## Mirroring software

Good, but complicated.

The software and the set up process varies depending on the phone being used and the computer being mirrored to.

## Usability testing platforms

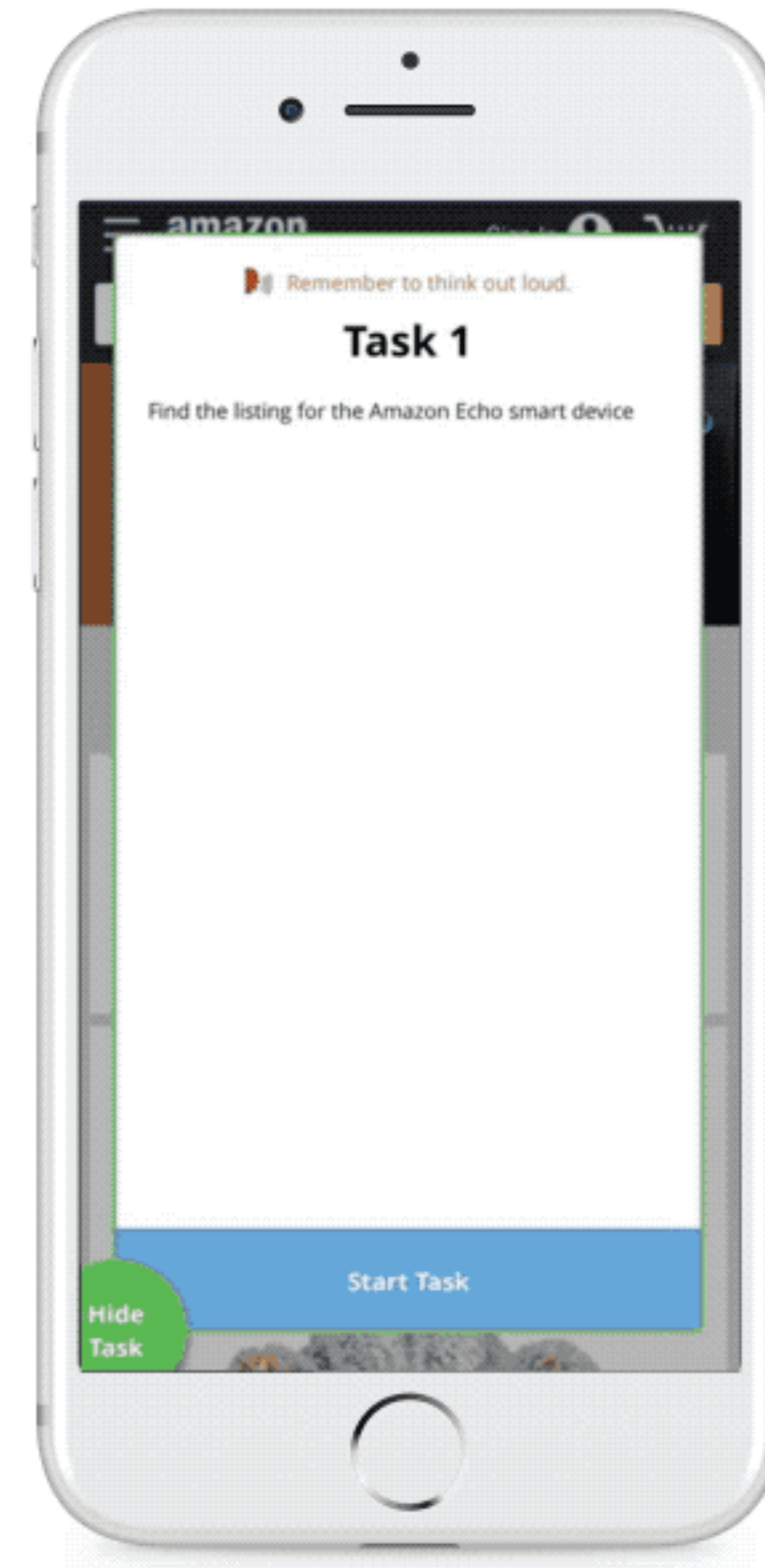
Your best and easiest option.

Walks your participant through the process of sharing their screen so you just have to think about the research

## Meeting software

Doable, but not recommended.

A lot can go wrong and sharing a screen using meeting software can be really unreliable.





# Transcripts

Speed up your analysis

Photo by Bernd Klutsch on Unsplash



## Human Powered

- Expensive. About \$150 for a 60-minute interview.
- Usually has roughly a 24-hour turnaround.
- Highly accurate depending on the transcriber.

## AI Powered

- Cheap. About \$6 for a 60-minute interview.
- Transcript can be delivered in about 20-minutes.
- Not accurate, but good enough if you don't have much of a budget.

### Pro Tips:

- Get time stamps to help refer back to the video for confusing moments or clips you want to save for the highlight reel.
- Convert the video to audio-only to maintain confidentiality.



# Analysis

Choose your weapon





# Remote recruiting

Be careful and communicate well

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# Recruiting

How much help do you need?



## Professional Services

- Your success is their success. If you ask, they will help make sure you have a great recruit.
- Can take on privacy, security, payment, and project management duties.



## Online Self-Service

- More affordable and efficient, but you get little to no help.
- Ask for a quote and how many people in their database fit your participant requirements.



## Full DIY

- Using personal/ professional networks or internal customer lists
- Assign one person to control the data and reduce risks of privacy violations.

Whatever you choose, remember you need to maintain research ethics and be CCPA compliant.



# Scheduling

Manual vs. Automatic



Photo by Charles Deluvio on Unsplash



## Spreadsheet

Layout the time you have available to conduct your research interviews.

Specify the time zone.



## Web Application

Syncs with your online calendar, shows the relative time zone, and enters the selected session time in your calendar.



# Incentives

What will work best for you, the company, and the participants



## Recruiting service

Professional recruiters will handle this as part of the service package for a fee.



## Gift card processing and distribution services

Works on a commission basis. Secure and participants can choose what gift card they want.



## Online payment platforms

Simple, but make sure you limit who has access to participants' ID and contact info.



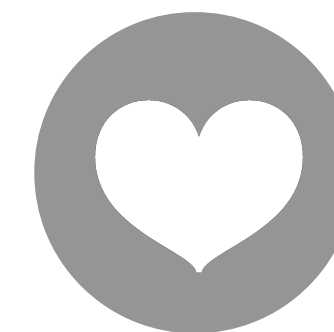
## Account credit

Free access to a service they currently use or preview access to a premium service can be enough.



## Gift cards

Prepay for cards to simplify and hasten distribution.



## Warm fuzzies

Usually only works for non-profits.





# Remote collaboration

Transparency is key





# Regular status updates

Keep communications consistent and stakeholders in the loop.

- Communicate your status on expected deliverables and what you are expecting from stakeholders.
- Denote the critical nature or deadlines for stakeholder contributions.

Luckily, the delivery and approval of research materials helps with the communication consistency.



# Editing and approval of screeners and guides

Make sure stakeholders have the opportunity to comment on and/or edit:

- Research objectives
- Screeners
- Recruiting progress
- Discussion guides
- Topline reports





# Opportunities to observe

If they didn't see it, it may as well have never happened.

Be transparent and open to criticism.

Offer a way for observers to communicate additional questions to ask during the sessions.

If stakeholders are unavailable to observe, write a quick email or post summarizing the session and send it to the team.



# Post-session debriefs

Ask the observers to stay on the line after the session for an additional 10 to 20-minutes.

Discuss:

- What was observed? Surprising? Interesting?
- What was the most valuable information uncovered?
- Are there any changes to make before the next session?





# Topline reports

Topline reports are basically a well organized brain dump of all your observations during the study delivered within 24-hours of the study closure.

If done well, it turns into an outline of your report.

If the team values speed over archive quality documentation, they can be the only report you deliver.

Use the topline report as an opportunity to invite disagreement from the stakeholders before you write the full-report.

Toplines are **not** a replacement for thorough analysis.



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# You've got this!

Try. Learn. Adjust. Repeat.

---





# THANK YOU

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