Insights from Anywhere

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THIS SUCKS

But we're all in the same boat
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Technology options

Choosing the right tool for the job

Tool Selection Comes Last

Define your research first

What are your research objectives?

Who are your target participants and what are their constraints?

What kind of end deliverables will you need?

Choose your tool.

Platforms
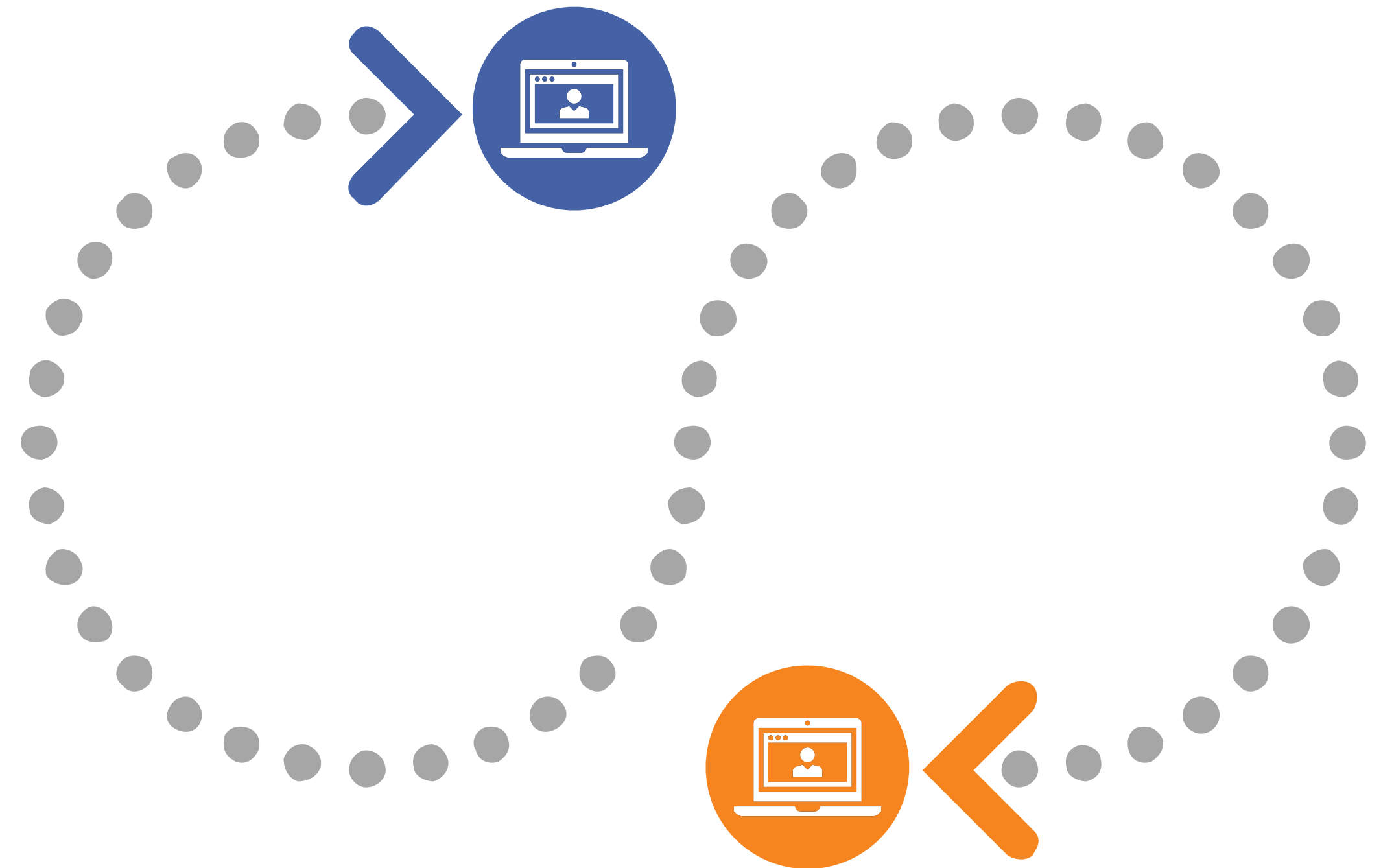
Simple to complicated

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

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

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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.
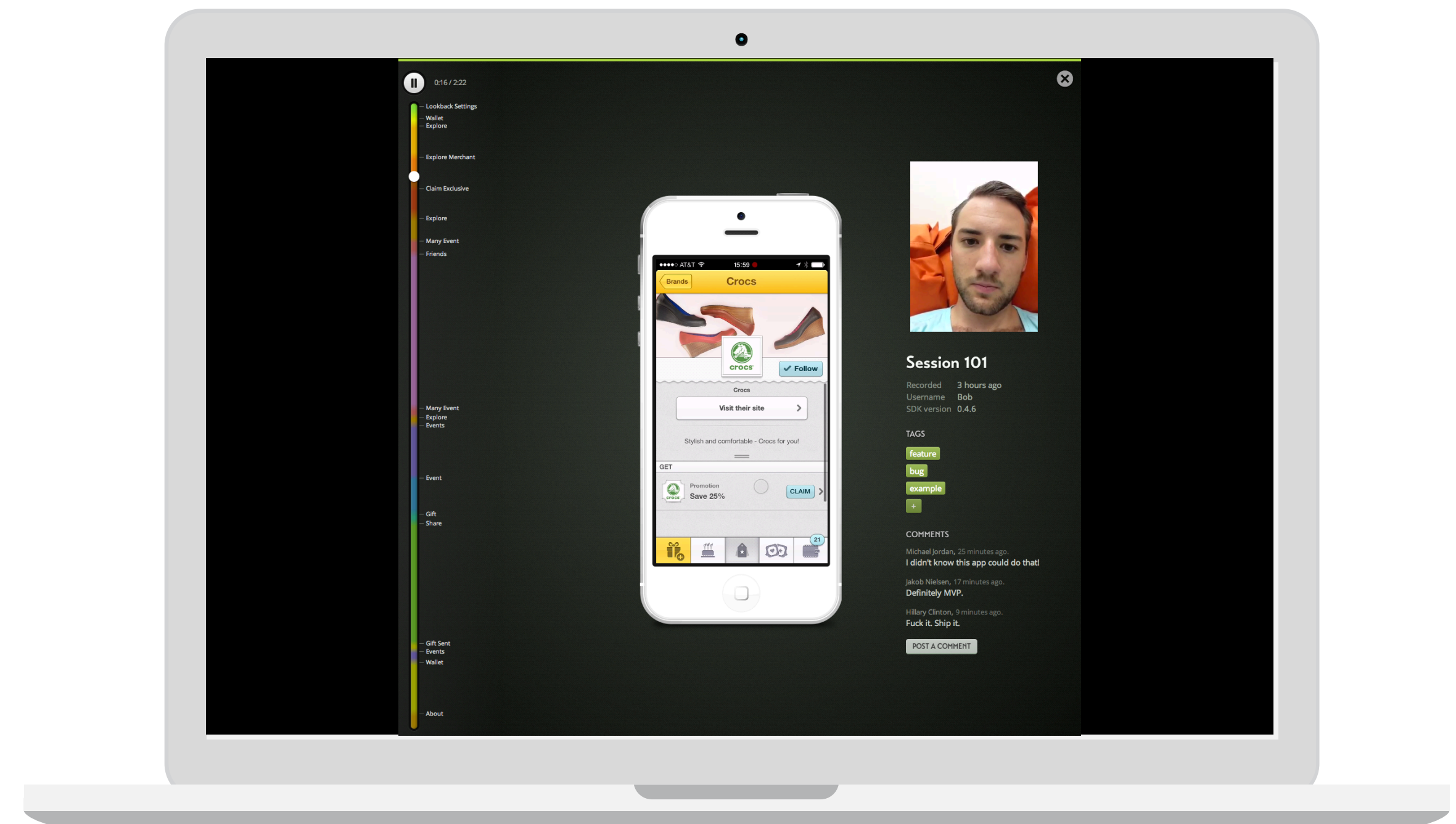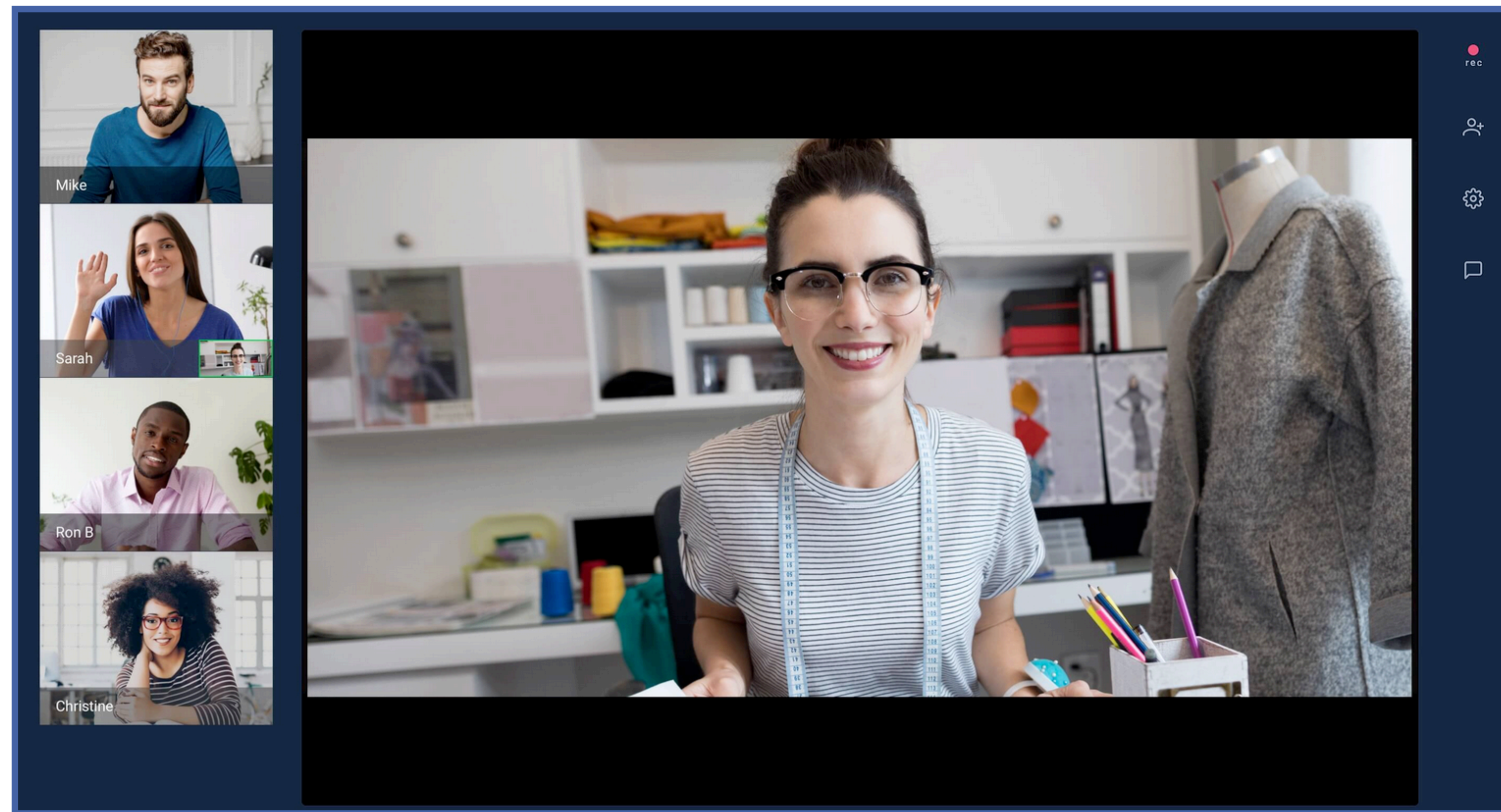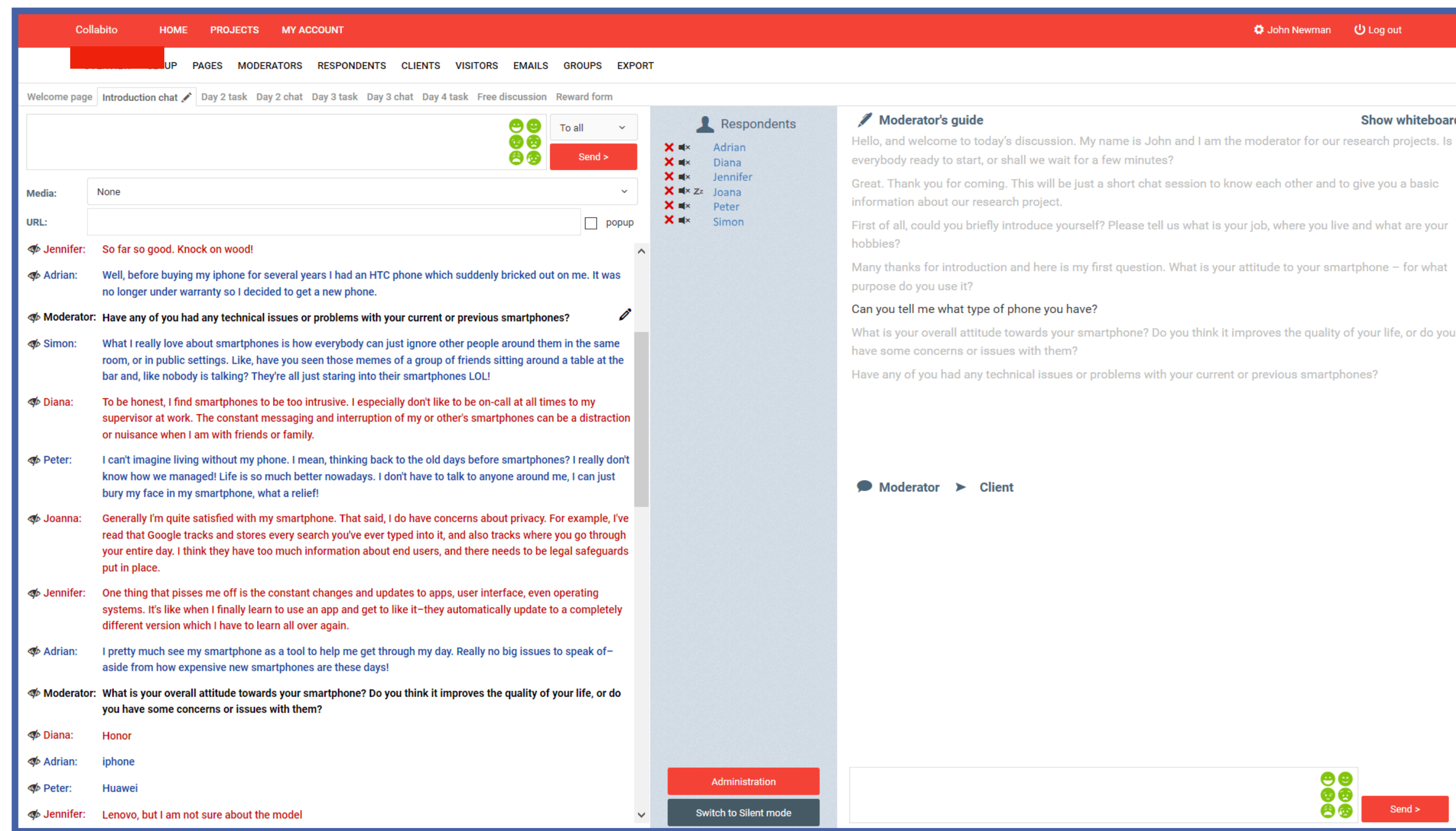
Video Focus Groups

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.

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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
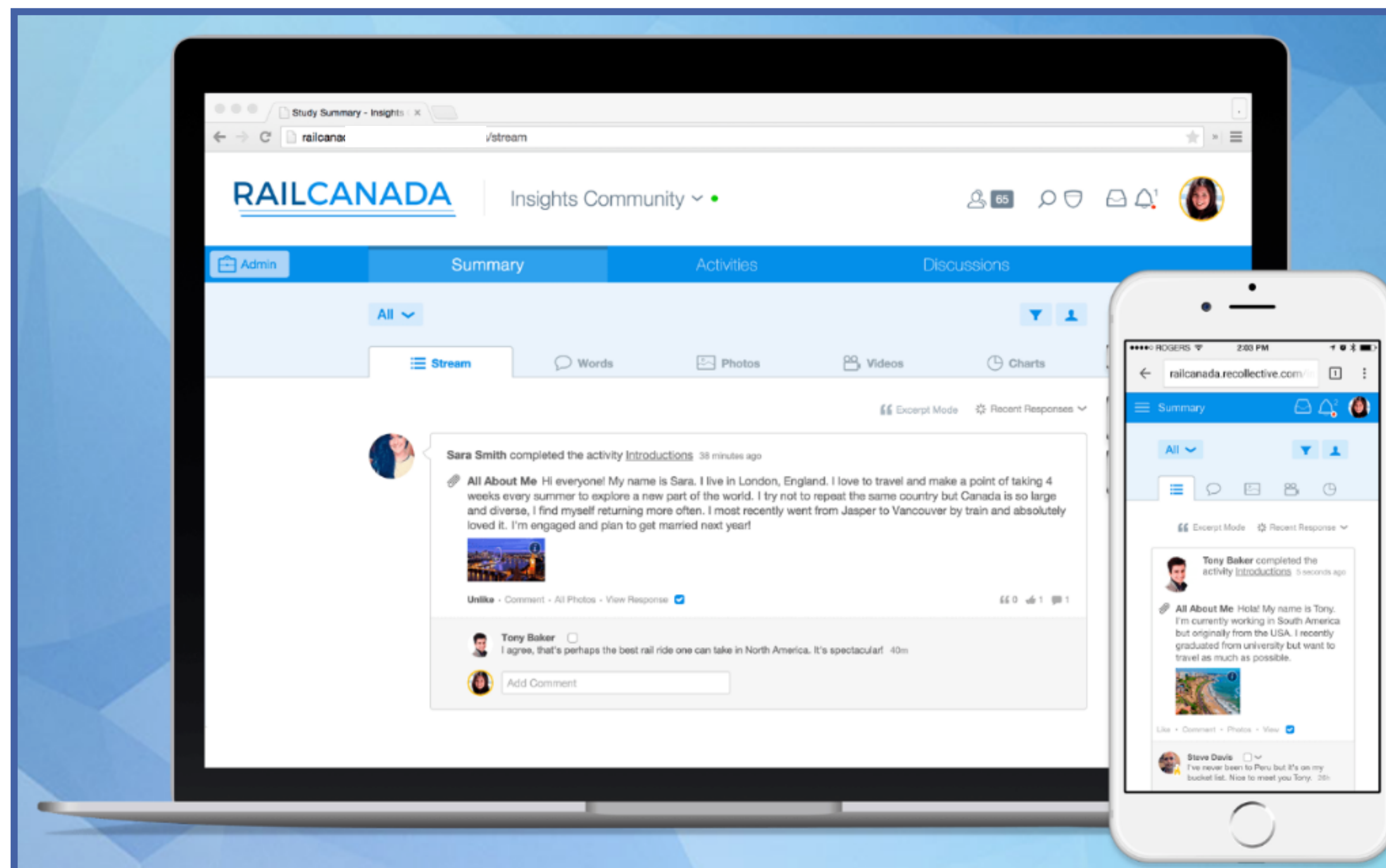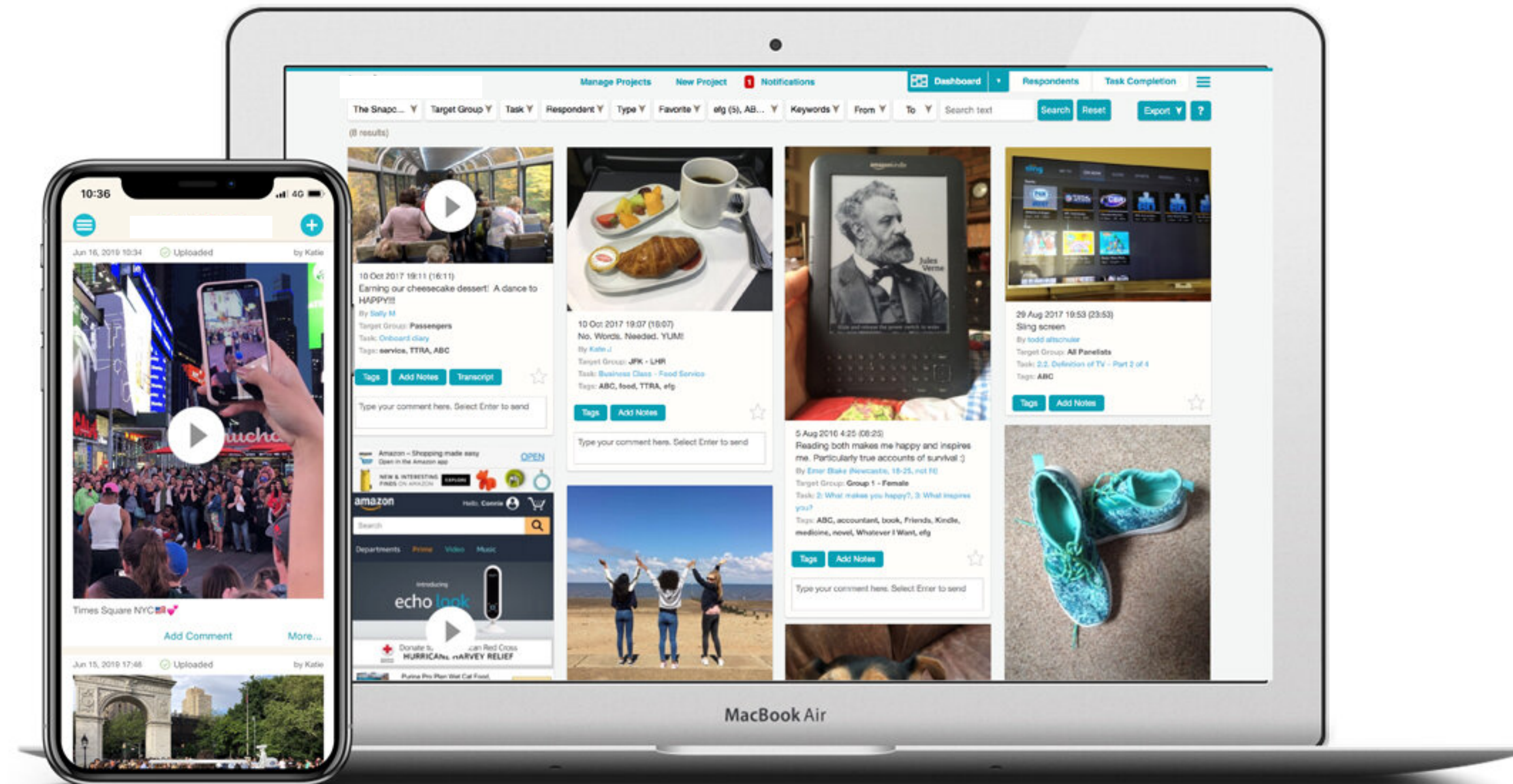
- Provides a virtual backroom for stakeholders

- 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

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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

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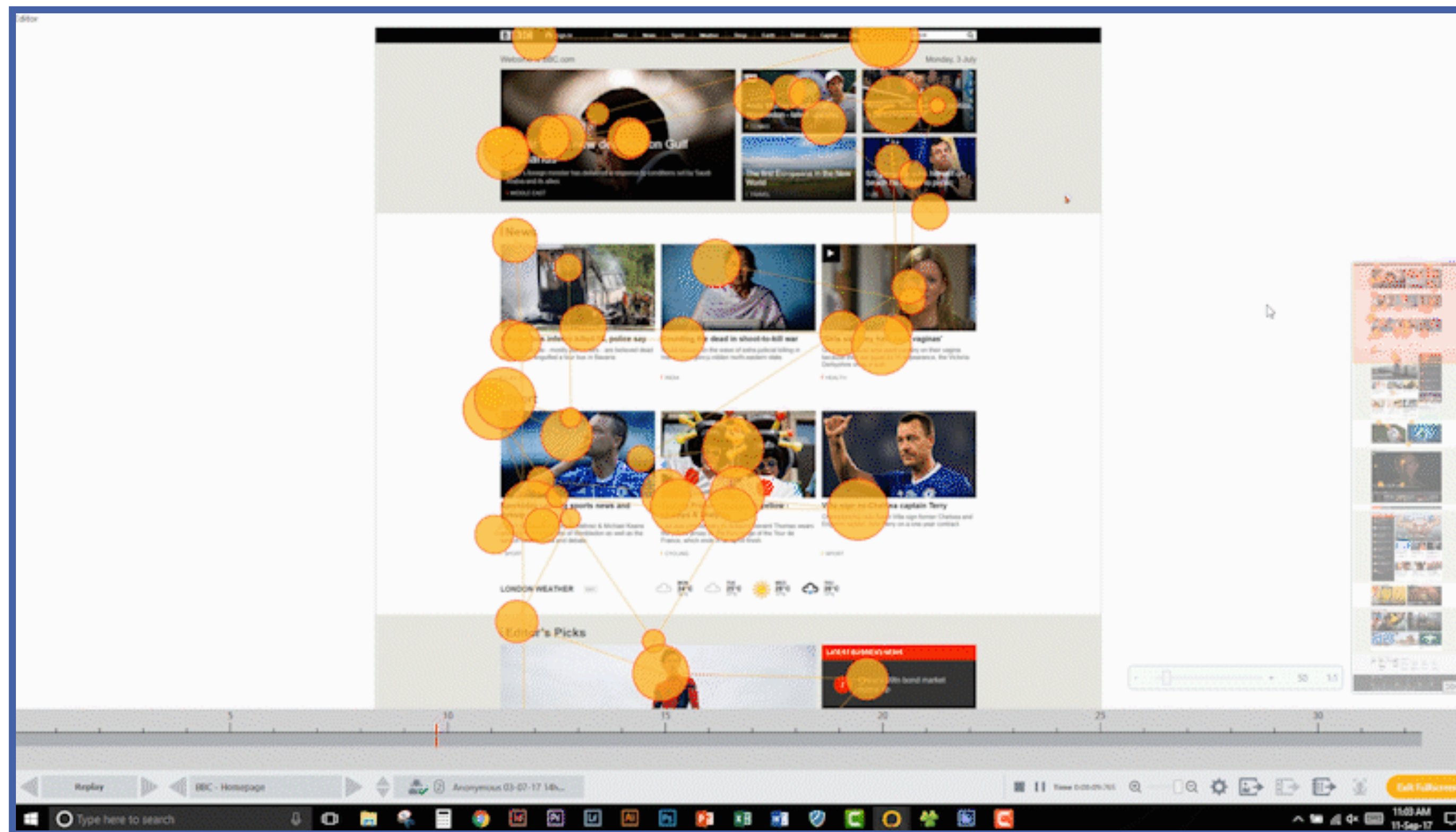
Eye Tracking

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
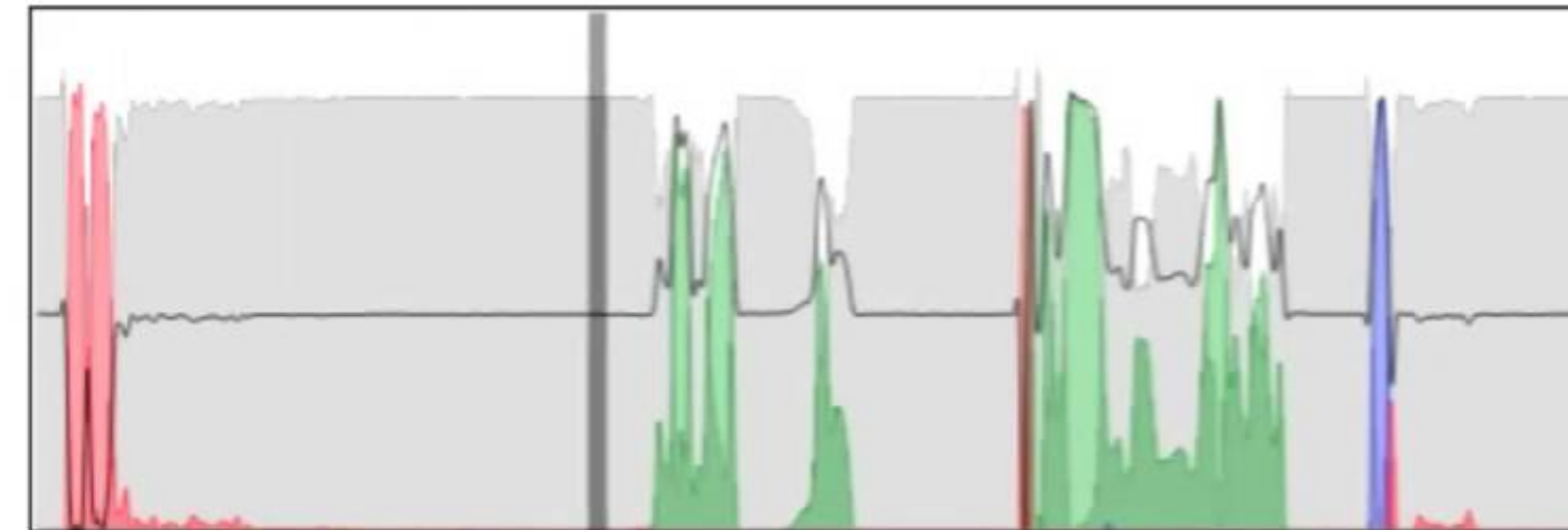
Facial Coding

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
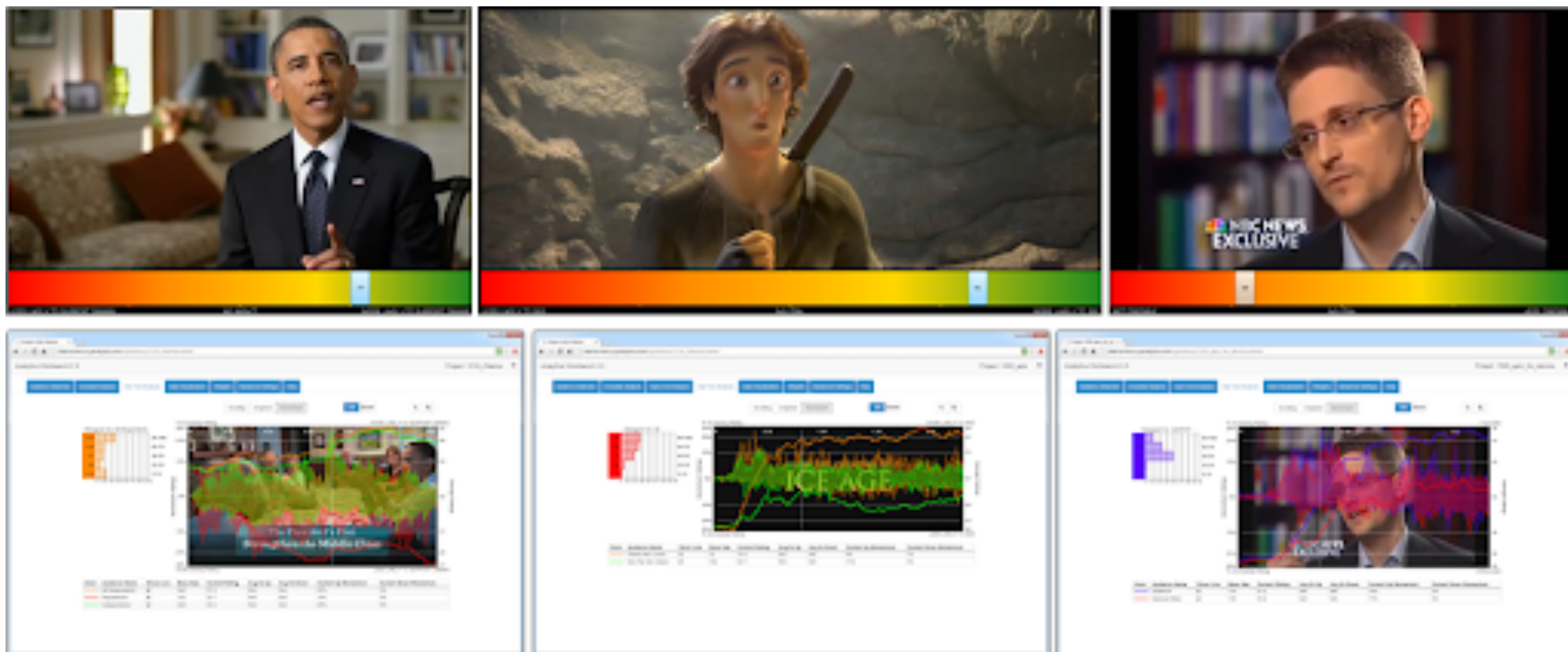
Dial Testing

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
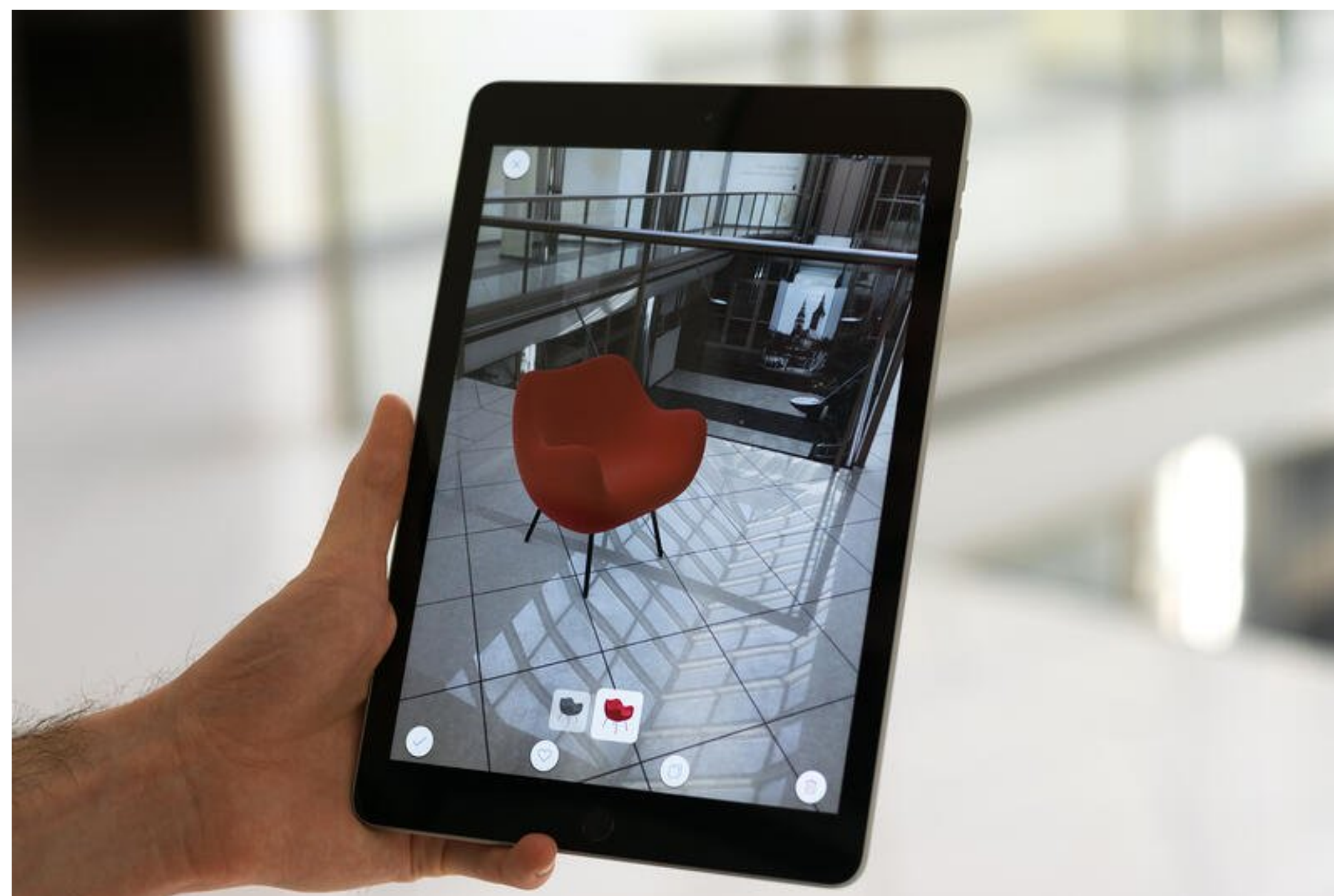
Augmented & Virtual Reality

Test products without the products

- Uses the phone screen or VR headset
- Participants are able to see and evaluate a product or experience without leaving their homes

- Participants can give feedback on products in early development stages
- Can capture eye tracking information

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.

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Backchannel

For stakeholder buy-in and real-time feedback
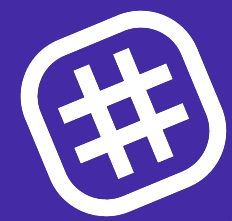
Messaging platforms or groups

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

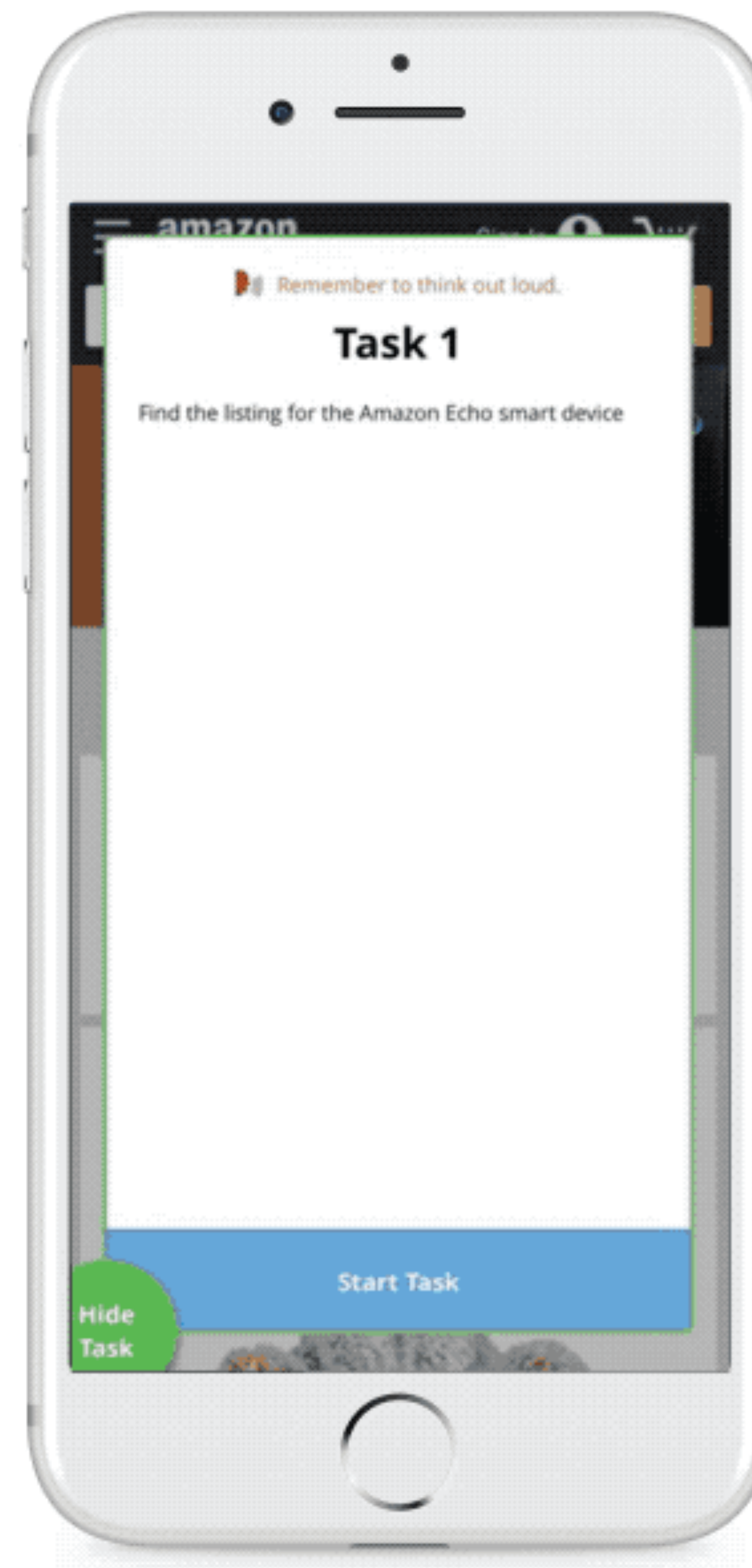Your best and easiest option.

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.

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Remember to think out loud.

Task 1

Find the listing for the Amazon Echo smart device

Start Task

Hide Task

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

Paper, Highlighters, Scissors

Time consuming.
A great collaborative analysis exercise, but not when everyone is remote.

Spreadsheets

Ready for tagging.
Specialized human transcribers can enter their work directly into a spreadsheet.

Tagging online documents

Easy, but messy and hard to look at the aggregate data.

Collaborative affinity maps

Get everyone who observed the session to write virtual post-its of the insights they saw.

Qualitative analysis software

Can range from simple and affordable to complex and expensive.
Most allow for multiple people to participate in the analysis.

You've got this!

Try. Learn. Adjust. Repeat.

THANK YOU

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