



QRCA

IDEAS & TOOLS
FOR QUALITATIVE RESEARCH

VIEWS

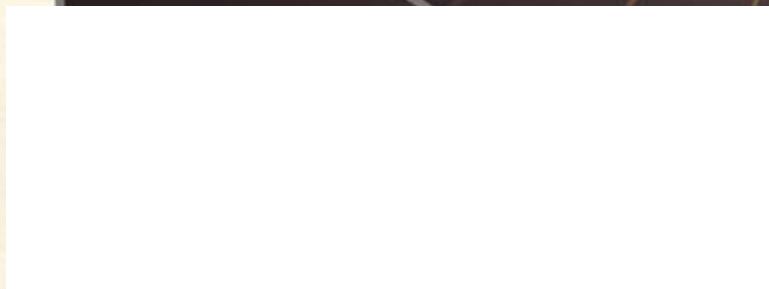
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Hanging Chads and Exuberant X's... Testing a Voting System for Usability

Best Practices for Real-Time
Online Focus Groups

The Vitality Boom: Marketing
to Active, Boomer Women

Software Tools for
Qualitative Research Analysis

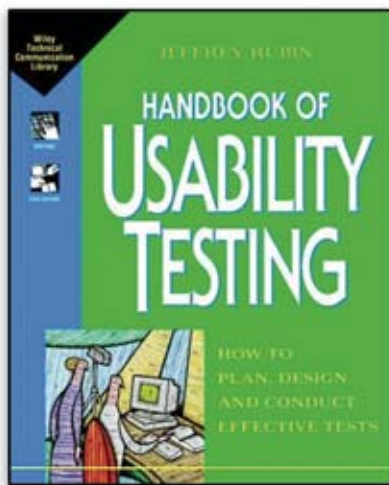


Valuable Reading...

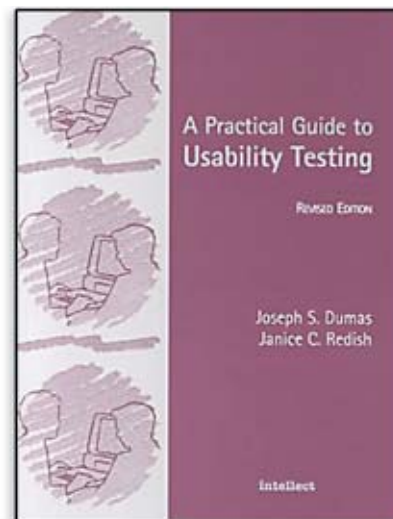
Three Titles to Help You Expand Your Capabilities

BY KAY CORRY AUBREY

Usability Resources, Inc. • Bedford, Massachusetts • Kay@UsabilityResources.net



Handbook of Usability Testing
By Jeffrey Rubin



Practical Guide to Usability Testing
By Joe Dumas and Janice Redish

Interested in expanding your services to include usability testing? Need a quick study to get up to speed? Either of these books will help you get started.

Both offer details on the nuts and bolts of how to plan, run and execute usability tests. You will learn how usability testers employ many of the same skills as the qualitative researcher: empathy, listening and observation, working with clients to establish study objectives, research design, study sample definition and recruiting, as well as managing observers in the back room.

You will also learn about the unique skills involved in usability testing, where the goal is to determine how well people understand and can perform critical tasks with a product. Rather than gathering insights on the participant's perceptions, opinions, beliefs and attitudes of a product, usability testers design a study to

isolate the specific aspects of a product that might mislead or confuse a target user. Usability testing is slow, quiet and focused on details; during the session, you need to get inside the participant's cognition.

As with running focus groups, you must pay a lot of attention to the care and feeding of your participants. Both books give excellent tips for creating a testing environment where people feel safe, respected and free to speak their minds.

The Rubin book cautions you to speak with participants before the session, if you have recruited them through an agency, to make sure they understand what to expect. The author also suggests strategies on how to interact with participants to elicit complete and objective responses.

Both books go into detail on the need to train observers so they do not embarrass the participants or otherwise derail the session. With usability testing, the observers are often in the

same room as the moderator and the participants, so observers should “fade into the background” to keep the test productive.

Both books offer perspective on where usability testing fits into the qualitative researcher’s toolkit (which also includes focus group moderation, in-depth interviews, task analysis and observations) and when it is appropriate to use each technique. You will learn the thought process and tactics involved in working with engineering teams to define study objectives and carry out sessions that produce reliable data. Both books also provide templates and checklists that will save you time and ensure that you have the many bases covered.

Instead of using a discussion guide, usability test moderators give the participants a task list, which is designed to explore the usability issues of specific aspects of the product. As the participants work through the list, they narrate their thoughts and impressions. These narrations, combined with how well each participant succeeds or fails at a task, are used to determine the product’s usability. Both books do an excellent job of describing approaches to creating a task list, as well as providing examples. The task list should be self-explanatory, as well as easy to understand and follow: it should guide the participants so they use particular product features without giving explicit instructions.

As with focus groups, if you do a good job setting up the study, you will get valid results, although often you can’t predict what these results will be. Sometimes people breeze through tasks you thought would be difficult but stumble over unexpected areas. Both books advise you to be methodical (i.e., treat each participant the same and have them cover the same product areas), while still allowing the participants to veer off the task list when their exploration serves the study objectives. To keep each session uniform, the authors recommend using a script for each planned interaction with the participants. The authors suggest holding your interview questions until the end of a session, during a “post test” where you and the observers review the session with the participants.

Both books recommend collecting quantitative and qualitative data. Usability studies most often involve a small number of sessions, generally eight to ten. The quantitative data you collect (e.g., time to complete a task, success or failure on a task, number of errors and number of times the participants referenced help) can lend another dimension to support the overall feedback, providing simple descriptive statistics. Both authors advise you to stick with descriptive statistics and avoid using quantitative data for

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inferential statistics. Use inferential statistics only when appropriate and when you and your client understand how to apply and interpret them.

As with interviews and focus groups, usability tests produce huge amounts of data and insight. Rubin advises you to ignore politics when you write your first draft and to report the raw truth on how the sessions went. Dumas and Redish advise you to hold off on writing the report until you and your client have reached a consensus on the product’s usability problems. They provide a very detailed step-by-step approach for consolidating, understanding and prioritizing the results.

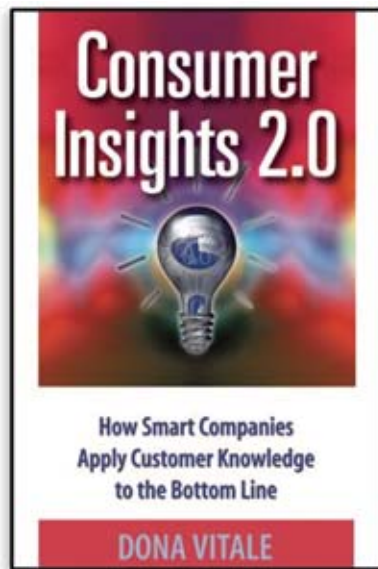
As with other types of qualitative research, the results from your sessions can be the first outside feedback your client has received, and sometimes the news is shocking and upsetting. It is not uncommon for a client to ignore or reject your results, even if your study methods were sound and your participants had the same confusions. The Dumas and Redish book offers excellent advice on how to deal with the organizational dynamics around usability feedback. They describe techniques to minimize resistance, such as having the client identify potential usability issues and waiting to write your report until you have agreement among the stakeholders on the problems the sessions surfaced. Another distinguishing feature of usability testing is that it is most often done with technology products, so learning how to communicate with engineers and get their respect is a critical determinant of your success.

If you are interested in learning more about usability testing, either of these books will provide you with a solid background. Read both books to get a complete understanding of the usability testing process and skills needed. While neither book covers usability testing for websites, you can easily adapt these techniques for this purpose.

The Rubin book, while older and more expensive, is shorter and easy to read. The testing techniques detailed still hold true. The formality and staffing roles he recommends, however, no longer apply because usability testing is more commonplace. Most companies

are unwilling to pay for a videographer and timekeeper. Unless there is a good reason to spend money on production, sessions are commonly not recorded and are run in a conference room with client observers sitting at the table with you and the participant.

The Dumas book is more comprehensive and contains many more templates and checklists to guide you through your first sessions. This book also contains valuable sections on how to handle the politics of usability testing, as well as strategies for writing reports that your clients will read and appreciate.



Consumer Insights 2.0 — How Smart Companies Apply Customer Knowledge to the Bottom Line

By *Dona Vitale*

Forces such as globalization, immigration, the influence of boomers, gen-Xers and new communication technologies have created a society of unique subcultures. Successful companies know they must go beyond traditional market research to really understand how to create products that will appeal to very distinct niches, each with its own world view and identity.

Vitale describes how insights-driven companies have a culture that encourages information sharing and collaboration. Using a “bricolage” approach to research, they “tinker around and build from whatever materials may be available” to follow the cultural and environmental trends affecting target audiences. This means borrowing a wide

To make sense of your target audience, Vitale advises researchers to read what your customers read, visit their stores, read their magazines, watch their TV shows and basically do everything you can to understand their world.

range of research approaches from diverse disciplines such as anthropology, data mining, psychology and linguistics. These firms’ goal is to use the most effective techniques to learn about the consumer and to put consumer insights in the center of everyone’s thinking.

As a case study, the author presents Dunkin Donuts, which was losing ground to Starbucks in the earlier part of this decade. They reorganized their company so that all strategic decisions — from menu options to store design and employee uniforms — were to be driven by customer feedback.

Vitale outlines how Dunkin Donuts’ market researchers approached thousands of coffee purchasers through interviews, focus groups and anthropological techniques. They learned that customers loyal to Dunkin Donuts are fundamentally different from people who go to Starbucks. Loyal Dunkin Donuts’ drinkers see themselves as average people who “sweat for their money” and want “a regular cup of coffee for a regular guy,” as opposed to Starbucks drinkers, whom they viewed as ambitious, pretentious, self- and work-obsessed yuppies.

The researchers learned that Dunkin Donuts’ customers appreciate the shop’s utilitarian and efficient atmosphere. As a result of this knowledge, they focused their energies on increasing efficiency; they got rid of the espresso, added fresh food to the menu, increased the store’s comfortable seating and kept the familiar pink-and-orange color scheme. So far, the strategy has worked well.

Because consumers process marketing information in a variety of ways, Vitale recommends employing multiple models to make sense of consumer behavior. One approach — the social psychological model — links behavior to a consumer’s aspirations. In this framework, you focus on the consumers’ values, the people they admire, how they see themselves and how a product either enhances or detracts from this

self-image. The Economic Utility Model looks at the relationship between what a consumer is willing to pay versus the item's perceived value. The Freudian model examines how our deeply rooted needs find expression in purchasing decisions (e.g., the middle-aged man who buys a red convertible instead of taking a mistress).

Throughout her book, Vitale describes the need to get into your customers' shoes to really understand them. To make sense of your target audience, she advises researchers to read what your customers read, visit their stores, read their magazines, watch their TV shows and basically do everything you can to understand their world.

It is also important to understand everything there is to know about the product you are studying. Visit the factory where the product is made, and learn about the supply chain it follows on its way to the marketplace. Talk with product salespeople, trainers, quality-assurance people and anyone who can round out your understanding of how customers use the product.

In the latter part of her book, Vitale outlines techniques to explore the feelings and needs of your target audience. Ask a consumer to tell a story around how he or she uses the product, and then listen for the social and emotional triggers, as well as structural elements such as plot, main characters, conflict, themes, heroes, villains, problems and struggles. Ask whether the brand satisfied the customer's needs, caused a favorable outcome or disappointed him or her.

Vitale describes the use of projective techniques to help

people explore sensitive topics and negative emotions. "Personification" is a projective technique where you ask a consumer to draw a picture of a person who embodies a brand or idea, such as Mr. Budweiser. Ask the customer to start with specific physical features and then dig deeper with questions about the character's interests, ambitions, values and dreams. Then, place the character in a scenario with opposing brands to see what happens.

Much of a customer's emotional attachment to a product can be detected through the words a consumer uses — daddy's "toy" versus "favorite tool." Listening closely can expose indirect criticism, such as when teens tell you a product might appeal to their parents.

Metaphor and projection are two additional methods to elicit information from your consumer. Use metaphor to understand a consumer's feelings towards concepts that are more sensory and that have not yet been put into words.

Vitale's new book is an excellent primer on the emerging area of customer insight research. It would be a very good starting point for people new to the field, as well as a gift you might give clients to help them understand your work. 📧

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