

How to Conduct Remote User Research

Whitepaper

These times they are certainly a-changin'.

The global pandemic has affected all businesses everywhere. In-person meetings feel like a thing of a bygone era, conferences and trade shows are cancelled, everyone needs a home office, yet now, more than ever, checking in on your users is crucial.

Behavior is changing rapidly. Just look within your organization. How many employees conducted virtual team meetings before the pandemic? Did you have a fully remote approval process built into your workflow? Had you ever done a video chat with a client?

Everyone is changing how they operate, and getting into the groove, but in all of your innovations, have you changed enough for your end users?

In the current climate, organizations need to be working smarter than ever before, and a vital component of that is delivering what your users actually wants. Organizations that know, with certainty, that they've really heard what people are looking for are best poised for success.

The easiest way to find out what they want? Ask them.

“That’s the beauty of User Research; it’s proactive rather than reactive.”

This whitepaper will share five things you can do in-house right now to learn about your users remotely.

Why do you need User Research?

[User Research](#) fills in the gaps between what people say they want and what they actually need. Think of User Research as your annual physical. You want to see if there's anything wrong before any symptoms become unmanageable.

It's easy to assume that we already know what our users need and what problem we should be solving. Research helps shine a new light on what people are actually experiencing and what their priorities are. This process allows us to identify when an organization's project goals don't align with their customers' reality.

In short, User Research will allow your organization to confirm that you're solving the right problems.

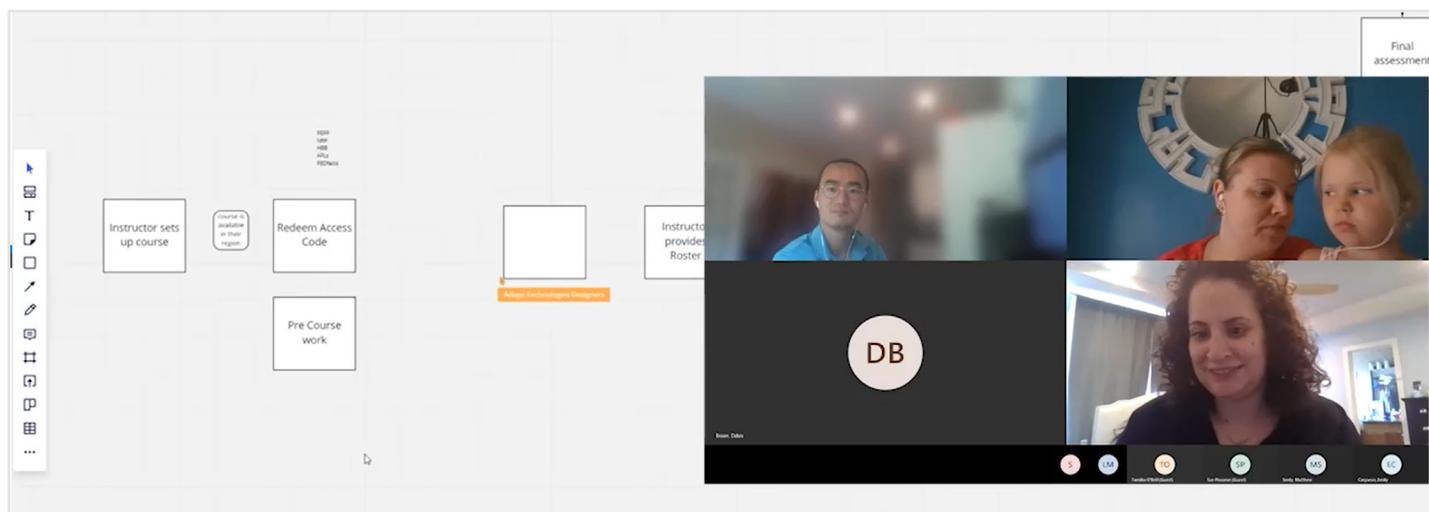
What's different about remote research?

Our typical User Research phase is done almost entirely in person. We closely shadow various end-users, we attend annual meetings and conferences to conduct in-person interviews, and when we are ready to synthesize our findings we do it in a large, jovial, group meeting brimming with whiteboards, post-it notes and a shared bucket of markers.

While the germ-spreading, in-person aspects have been cancelled, the need for the information about users is stronger than ever. As mentioned, behaviors are changing rapidly, and organizations must identify these new demands if they are to meet them.

Sure, face-to-face data collection is out the window, but here's some good news: **some user research activities are actually more suited for a remote setup.** Using the right methods and the right technology your remote research can be just as effective. As always, there are a few things to consider.

- **Make sure the technology functions as intended.** It's always a good idea to run a pilot test, even it's a tool that you have used before.
- **Be more intentional with selecting and scheduling participants.** We can't just pick people off at a large conference, we need to understand who the best candidates are to get the information you need. People's availability may also have shifted due to home school duties, limited internet bandwidth, and many other factors that came with prolonged working from home.
- **Let the technology work for you, not against you.** Because of the remote work, your users may already be familiar with specific tools and technologies. Instead of asking them to install and onboard onto new tools, consider taking advantage of what's already there.
- **Make sure you have a plan B.** If you run it enough times, you will find that every now and then your primary approach fails. Having a solid backup plan ready to go will keep you from scrambling for an alternative. Stuff happens, always have a plan B.



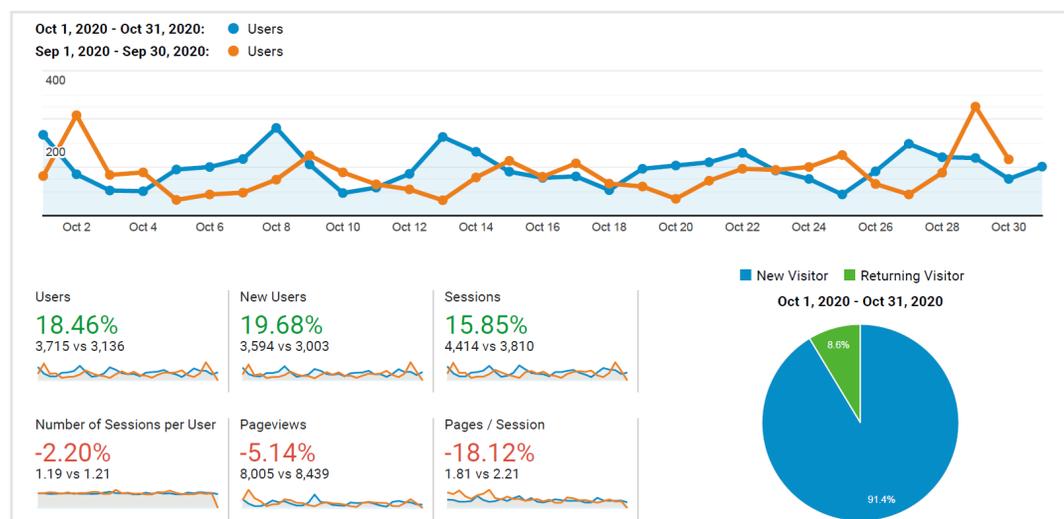
Five Things to Do Right Now (and how to do them)

1. Start with the data and platform you already have in place.

Check analytics for shifting patterns. You can begin your evaluation by looking into Google Analytics and see if you notice any pages that have received increasing traffic. How about the bounce rate of those pages? If you notice any major shifts in your page performance, you might be on to something.

Next, examine your current methods for collecting user feedback. For example, have you received more emails, complaints, phone calls or contact form submissions? What are those users saying? Do you have a customer service log? Have you been tracking complaints you've received from customers? If you have these records, it's a good practice to analyze them periodically and identify new emerging patterns. Is your call center overwhelmed by phone calls?

Essentially, look into the most common requests and you might just have a roadmap to turn those high-touch interactions into automated self-services.



2. Now is a great time for moderated usability testing.

Although people are zoom fatigued, they aren't screen share shy anymore and it's become much more normal to jump on a virtual call. Do you have an idea you're not sure about? Have you recently rolled out some changes? Usability testing is a great way to equip yourself with users' feedback and insights.

Start by identifying what you want to test – the most typical example might be a new product, or web page – then create the testing scripts. These tests can be small and focus on one user journey at a time. Make sure you recruit a representative pool of participants for your tests. You can ask the users to perform a task using your live website or app. Alternatively you can also conduct testing using prototypes. Don't forget to offer users compensation for their time, a gift card for a cup of coffee goes a long way.

3. Increase the cadence of your surveys.

How have your user's shifted their behavior because of remote working? Survey is a great way to gather a large sample of user inputs. To gather timely and relevant insights in today's fast-changing world, consider leaner, more topical surveys at an increased cadence.

An easy starting point is to send out targeted pulse surveys. Your users might already be facing some stressful moments in life and you don't want to bombard them with questionnaire after questionnaire.

Be creative about when and how you conduct these surveys. It's best to gather users' feedback right after they've completed a task, like say watched a webinar or purchased a product. Make it specific and relevant. These small, frequent, and targeted surveys can provide in-time feedback to inform agile iterations of your products and services. Don't wait for the annual customer surveys. Be mindful of your users, and start now

4. Field study isn't possible, so switch to a diary study.

It is still valuable to understand how users interact with your products or services in their natural environment. The current situation may have rendered in-person field study challenging, but it does not negatively affect diary study, the "remote" cousin of field study.

Identify a group of representative users and recruit them to participate in a diary study. Ask them to record moments of their life related (or not) to your product or service. The goal is to capture as full a picture as possible of the context in which your users interact with your product or service. These glimpses into the real environment can usually spark innovative ideas. You can pair diary studies with surveys, interviews, or a combination of other research methods.

5. Try Tree Testing.

This is a bit of a lesser known research technique, yet one that can be done internally and completely remotely. Tree testing is a great tool to test how effective your navigation scheme is. With the pandemic, lots of organizations have to alter their business models to adapt and survive. The bottom line is it's more important than ever to know that your navigation can lead to goal conversion rather than confusion and abandonment.

To prepare for a tree test, you will need to identify the top user goals and what the goal pages are on your website. In a tree test, users explore the navigation tree and try to get to the goal pages based on your prompt, for example to download a product spec document or to sign up for a webinar. You will also need to build out a navigation scheme in the test environment that matches your proposed information architecture to make the test effective. Once you have those setup, run the test and gather the results. Soon it will be abundantly clear what real users think about your proposed navigation scheme. If the results are poor, update your navigation and test again. It's better to fail the users in a test than failing them in real life.

Task 2 of 2

Check to see if you can access mobile broadband from your house.

BananaCom Homepage

Internet

3G Broadband

Coverage map

← I'd find it here

A Few Common Questions

Q: What resources do we need internally to be able to conduct research?

A: Anyone can do research. While it may seem time-consuming, never let “resources” be an excuse for not completing any research. Even limited research can still provide valuable insights and is certainly better than no research at all. That said, to successfully plan, orchestrate, conduct research activities and then synthesize and transform research findings into tangible outcomes, you will need experts that typically wear the hat of UX designer or UX researcher. In terms of tools, many platforms offer free trials or free access with limited features. Start small and find what works the best for your organization.

Q: How many interviews is enough?

A: It depends on the scope and user groups you’re interested in. But generally, starting with five representative users and focus on one area of interest. You’ll be surprised by how much you can learn by just having these structured interviews.

Q: My organization is struggling with X, which method should I use?

A: It depends. Nothing is one-size fits all, but if you feel stuck, here’s an easy generalized guide on what the best use cases for each of our recommended remote methods:

- Struggling with big picture direction on where to focus, use analytics review of shifting patterns
- Struggling with understanding the effectiveness of a recent product evolution, use moderated usability testing
- Struggling with capturing emerging user needs, use a user survey
- Struggling with coming up with innovative and revolutionary ideas, use a diary study
- Struggling with your navigation structure, conduct a tree test

Final Tips for Your Remote User Research Efforts

- **Make your work visible!** Get the word out: you care about understanding your users. During these isolating times showing that you care enough to check in on your users is a very good thing. Don't be shy about your efforts. People are looking for connection, empathy and acknowledgment that times are changing.
- **Be prepared for last minute changes and be ready to accommodate them.** The work-life paradigm has shifted dramatically for many of us. It's becoming increasingly difficult to make long-term plans and personal time – and space – is ever-more valuable. Know that last minute changes happen, especially now. It could be that day care is closed and someone needs to take care of the kid. It could be that one's spouse is taking over the only quiet spot in the house to have a very important phone call. When it happens, stay calm and be kind. Work with your participants to find alternative accommodations. You may need to conduct research outside of the normal office hours. But the reward is worth the effort.
- **Think outside of the box.** A challenge is an opportunity in disguise. Sure, we can't meet in person easily. Sure, it's harder to build trust without seeing one's face and body language. What seems limiting at first glance may open a new door for us. With remote research, you can reach users across the globe that may be cost-prohibitive to do so in person. You can schedule asynchronous activities that don't rely on everybody in the same room at the same time. With all the budget saved from corporate traveling and events, now might just be the moment to up your research game.
- **Certain things should be left to the pros.** Collecting user research is absolutely something you can and should do in house, but like all things, there are limits to what should be done without expert oversight. If you want a picture of what's going on, collect it yourself; if you want to establish an internal practice around your collection, farm it out. Consider hiring a third party:
 - To turn your data into the tangible outcomes.
 - When you start touching specific toolsets – don't waste time and money learning how Google Analytics, conversion rate optimization suites and customer feedback loop applications work, there are people who use those tools every day in their job.
 - If you are ready to synthesize and strategically plan your next move. If you have a goal in mind you want to get to it takes the experts to get it done effectively. If you want to build a house, and you have a strong vision (and Pinterest board), you still need architects to construct the thing.
 - To parse through the noise. Users aren't designers, understanding how to meet their needs without bending to their every request is a critical skill.

The bottom line is some research is better than no research.

You can't go wrong in asking your users what they think. You may not like what you hear and you can decide not to act on the feedback, but there's nothing lost by asking people. And you don't even need to be in the same room to get great information.

Happy gathering!

Learn more about how organizations are meeting the needs of their audience and improving retention and loyalty through user research techniques by visiting our [User Research Services](#) page.

