

IT ISN'T JUST FOR CRISIS CONTROL

REMOTE RESEARCH:

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AGENDA

- ▶ About Josh
- ▶ Remote Research Terminology
- ▶ Advantages/Disadvantages
- ▶ Research Frameworks
- ▶ Advice

POLLING TIME!

- ▶ What role are you?
 - ▶ Researcher
 - ▶ Designer
 - ▶ PM
 - ▶ Other
- ▶ What is your experience with Remote Research?
 - ▶ Beginner
 - ▶ Intermediate
 - ▶ Expert

ABOUT JOSH LAMAR

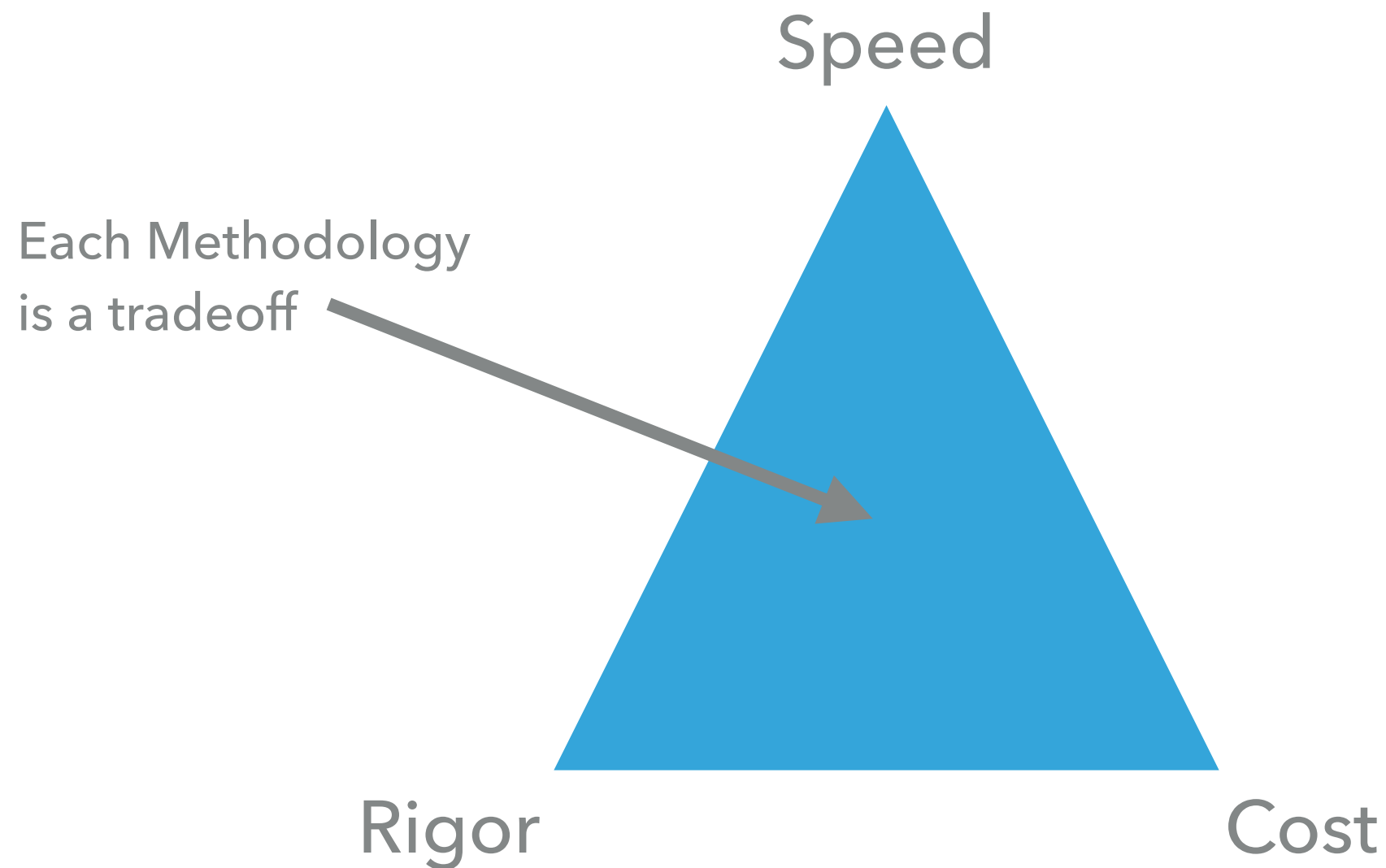
- ▶ Grew up in the USA (California) and lived in Seattle, WA for 20 years
- ▶ Academic Background in Music Composition, Poetry, and Human-Centered Design and Engineering
- ▶ 16 years Research Experience (12 at Microsoft)
- ▶ Specialization in Mobile & Tablets, Content Consumption, Productivity, and Communication
- ▶ Founded Authentique UX in August, 2019 in Paris, France
- ▶ www.authentiqueux.com



WHAT IS REMOTE RESEARCH?

- ▶ Research conducted remotely/online (location-displaced) instead of in-person (same location)
- ▶ Can occur live, in real time (synchronous) or time-displaced (asynchronous)
- ▶ Can be moderated by a human or by a Tool (unmoderated)
- ▶ Can involve 1:1 interactions or 1:Many interactions
- ▶ Can be used for any *conventional* Research Method (aka in-person lab studies)
- ▶ Can be video only or video + screen sharing (Say + Do)

METHODOLOGICAL TRADEOFFS



It is every researcher's job to understand what methodological tradeoffs they are making in order to answer their research questions in the best way possible.

MYTHS ABOUT REMOTE RESEARCH

- ▶ Remote research is **faster**
 - ▶ Unmoderated studies *can* be, but real time is still real time
 - ▶ Study preparation, screener, methodology, discussion guide, moderating sessions, and analysis take the same amount of time remote as it does in person
 - ▶ You do save travel/commute time for not going to a lab
- ▶ Remote research is **cheaper**
 - ▶ Online user panels *can* be, but recruiting through traditional means costs the same
 - ▶ The only cost you save are lab fees, but you add Tool fees, so it evens out
- ▶ Remote research **isn't as rigorous**, can't learn as much, and isn't as good as an in-person study
 - ▶ Remote research takes just as much effort and skill as in-person research

**YOUR FINDINGS ARE ONLY AS
GOOD AS YOUR DATA
COLLECTION METHODS.**

ADVANTAGES OF REMOTE RESEARCH

(AND SOME DISADVANTAGES)

ENVIRONMENT

- ▶ Users in their natural environment: Where users actually live, their actual commute
- ▶ Show and tell: Show me how you do [X]
 - ▶ Video tours of their home/commute
 - ▶ Photos and screenshots when specific scenarios occur
- ▶ Reducing the Hawthorne effect
- ▶ Empathy for remote teams
- ▶ Researcher environment conducive to Deep Work
 - ▶ More on this topic: <https://www.calnewport.com/#booksSec>

COMPUTER-MEDIATED COMMUNICATION CREATES A DISTANCE BETWEEN US, BUT WE CAN USE IT TO OUR ADVANTAGE TO HELP USERS FEEL COMFORTABLE OPENING UP TO SHARING HOW THEY REALLY FEEL.

TIME

- ▶ Research happens on the participant's time - more convenient for them
- ▶ No commute time for either of you
- ▶ Use time zones to your advantage: Morning on the West Coast of the USA is after work in London
- ▶ Studies often take less time to conduct
- ▶ Study data can be consumed at a later time

RECRUITMENT

- ▶ Find *exactly* the users you want-they can live anywhere
- ▶ More representative sample coming from across the country and not just from a single city (which may or may not be as representative)
- ▶ Eliminate bias of the tech hubs, which tend to be less representative of the country (E.g. avoid Seattle and Silicon Valley)
- ▶ Easier to get someone to commit if they don't have to leave their home, especially now

BAD USERS = BAD DATA

BAD DATA = BAD CONCLUSIONS

BAD CONCLUSIONS = BAD RECOMMENDATIONS

BAD RECOMMENDATIONS = BAD RESEARCH

METHODOLOGY

- ▶ Tip of the iceberg: Just to get a sense of what you might learn
- ▶ Simple questions: Start small and learn more as you go
- ▶ Iterative studies in the UCD process: Design > Test > Iterate > Test again
- ▶ Mixed Methods studies: Qual and Quant
- ▶ Phased research: Research doesn't exist in a vacuum
 - ▶ The best studies are aware of other research and allow you to get a broader, more comprehensive view of your users

“ITS ASSIMILATION REQUIRES THE CONSTRUCTION OF PRIOR THEORY AND RE-EVALUATION OF PRIOR FACT, AN INTRINSICALLY REVOLUTIONARY PROCESS THAT IS SELDOM COMPLETED BY A SINGLE MAN AND NEVER OVERNIGHT.”

Thomas Kuhn

DISADVANTAGES

- ▶ Cannot replace *being* there, not a replacement for real Ethnography
- ▶ Long sessions are harder when you have to be on your computer the whole time
- ▶ New Technology and Tools could be hard to learn
- ▶ Internet speed and online collaboration tools
- ▶ Participant pools may skew younger, more tech savvy, and more towards professional research participants
- ▶ International research can be more difficult if you haven't been to the country before or don't know the language

ADAPTING IN-PERSON TO REMOTE

- ▶ Easier to adapt: In-depth interviews & Concept studies
 - ▶ Only requires video call and maybe some light screen sharing
 - ▶ Data is mostly conversation
- ▶ Longitudinal studies
 - ▶ Especially intermittent feedback surveys on current behaviors / diaries
- ▶ Homework where the participant does something on their own and then submits
- ▶ More difficult to adapt: Usability, Benchmark, Co-creation
 - ▶ Method, tools, and internet connections
 - ▶ Observing small interactions

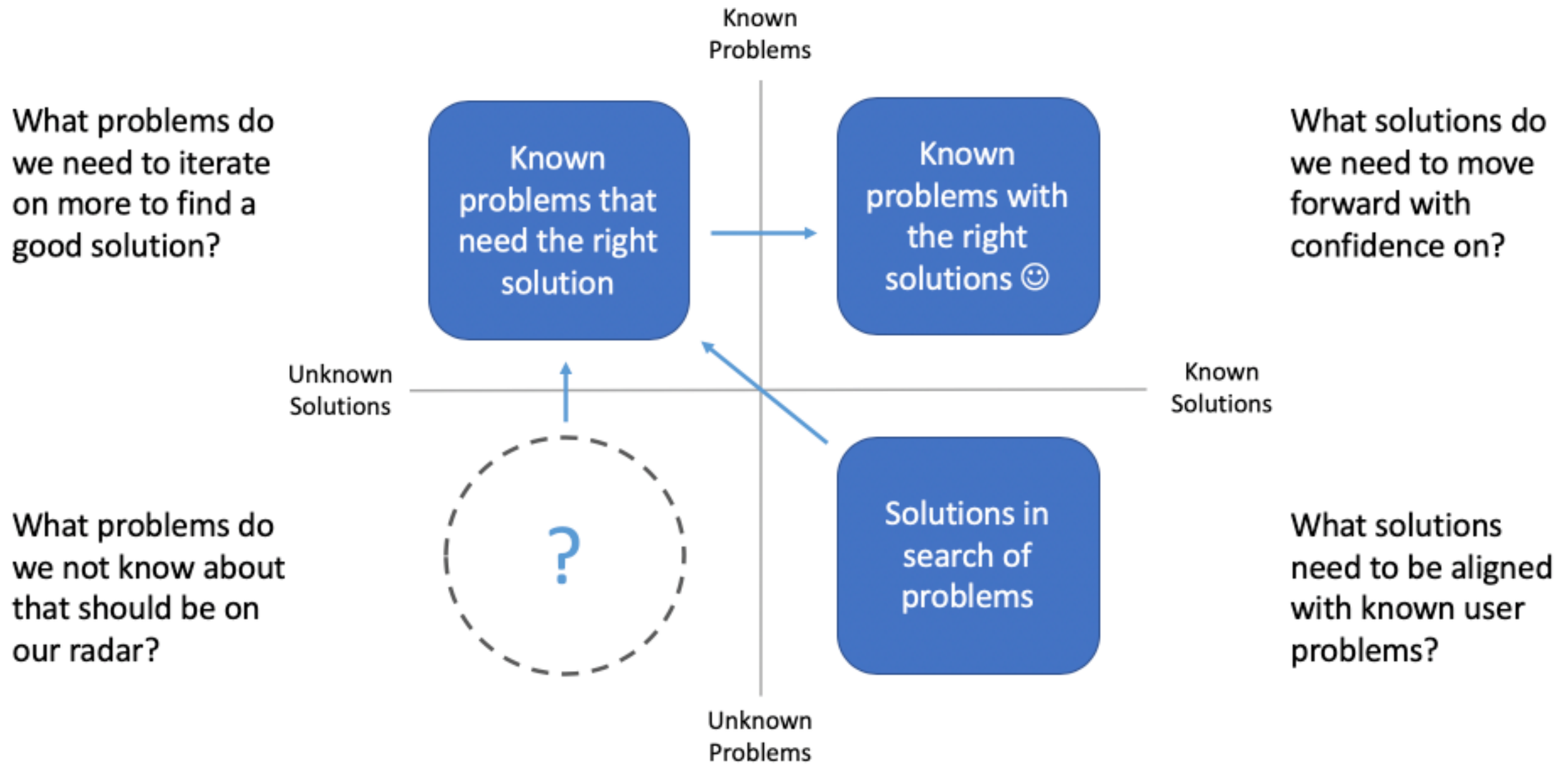
FRAMEWORKS

A FUNDAMENTAL TRUTH THAT IS SIMPLE, YET FORGOTTEN



All too often, we start with the Solution in mind and then reverse-engineer the User and the Problem to fit the Solution.

MOVING TOWARDS KNOWN PROBLEMS AND SOLUTIONS



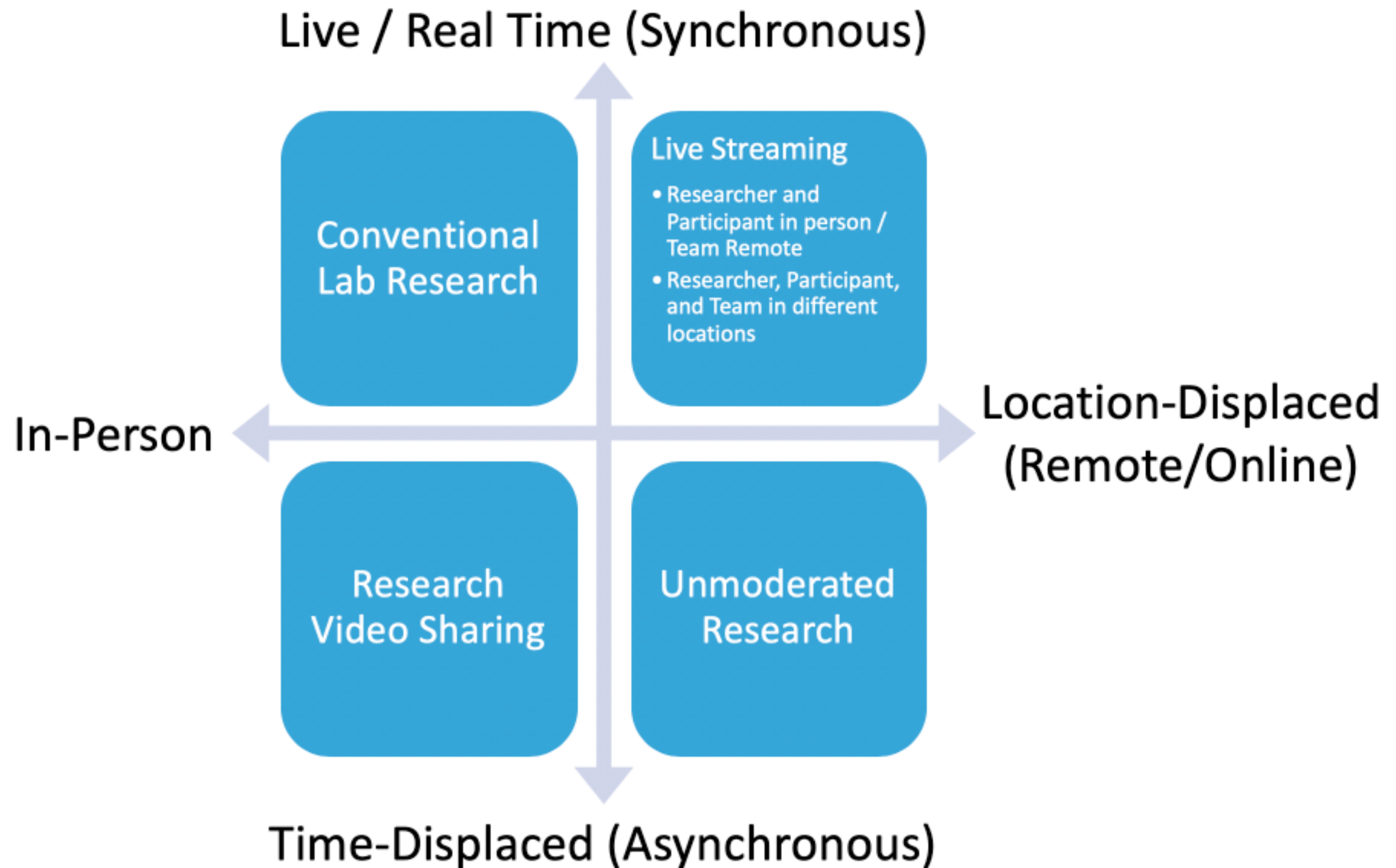
STRATEGIC DIMENSIONS: THE RESEARCH PLANNING FUNNEL

1. Relationship with other research activities
2. Place in the UCD Process (Generative/Strategic, Concept, Iteration, Evaluative/Tactical)
3. Specific Goals & Research Questions
4. Methodology: Tactical, Strategic, Mixed, Phased
5. Preference/Sentiment (Say) vs Behavior/Observation (Do)
6. Data type (Quant/Qual) alignment with conclusions

TACTICAL DIMENSIONS

- ▶ Location: In-person vs remote
- ▶ Temporality: Synchronous vs asynchronous
- ▶ Manner of conducting: Moderated vs unmoderated
- ▶ Tools (The last thing you decide on)

FRAMEWORK FOR REMOTE RESEARCH



COMPARING REMOTE RESEARCH OPTIONS

	Conducted By	Location	Consumed
Conventional Research:	Researcher	In-person	In real time
Live Streaming:	Researcher	In-person or Remote	In real time
Unmoderated Research:	System/Tool	Remote	Later time
Video Sharing:	Researcher or System	In-person or Remote	Later time

**RESEARCH
ADVICE**

ADVICE FOR APPROACHING RESEARCH

- ▶ Be Objective when you design your study
 - ▶ Allow room to prove OR disprove your hypothesis equally
- ▶ Constantly question your conclusions
 - ▶ Do I have the data to back this up? How strong is it?
- ▶ Critically evaluate new findings
 - ▶ Was the study conducted in a rigorous way?
- ▶ Assimilate new findings shrewdly
- ▶ Drop bad conclusions when new data is compelling

ADVICE FOR REMOTE RESEARCH: RAPPORT

- ▶ Share your real phone number or LinkedIn profile to develop trust
- ▶ Ask a question related to a current event, news story, or season
- ▶ Avoid potentially controversial topics like politics or religion
- ▶ Be genuine and show you care
- ▶ Laughter can be a great way to humanize each other - rapport goes both ways
- ▶ Always do whatever you can to ensure the participant feels comfortable

ADVICE FOR REMOTE RESEARCH: LIVE 1:1 SESSIONS

- ▶ Be early, send lots of reminders
- ▶ Be competent with the tools you're using
- ▶ Extend your working/available hours for doing research to accommodate participant schedules - you might need to work at odd times
- ▶ You may need to over recruit to ensure you have your target n
- ▶ Things will go wrong: kids... pets... internet connections - It's OK
- ▶ Laugh and move on; nothing is more humanizing than being interrupted by children and everyone can relate

ADVICE FOR REMOTE RESEARCH: GROUPS

- ▶ Dyads/Triads
 - ▶ Can be difficult when users talk over each other
 - ▶ Rapport is easier because they already know each other and will tease and laugh at each other - it takes the focus off of you
 - ▶ You still have to ensure both people share equally - good moderation applies
- ▶ Live Focus Groups
 - ▶ Take advantage of chat and external link to a survey to avoid bias
 - ▶ Have users respond to the survey first, and then to the chat
 - ▶ Allow for discussion to happen
 - ▶ Call on a specific person by name to talk / Own the meeting
- ▶ Co-creation studies: ensure you have one moderator and one person managing the co-creation
 - ▶ Ensure you have backup slides in case something doesn't work

ADVICE FOR REMOTE RESEARCH: UNMODERATED SESSIONS

- ▶ Be very clear about each question and instructions for each task
 - ▶ Don't ask more than one question at a time
 - ▶ Don't ask leading questions
- ▶ For unmoderated usability, ask users to say when they finish
 - ▶ Have users rate whether they were successful or not (and go back and watch videos to validate)
- ▶ At the end of each section, include an optional text box to allow users to tell you anything important about the last section of tasks
- ▶ Collect LOTS of photos, they can be a gold mine of additional information
- ▶ Unmoderated, message board, or diary studies
 - ▶ Can involve user interaction (or not)
 - ▶ Be sure to have them share what they think first to avoid bias from others' opinions

THANK YOU / Q&A

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