Experimenting with New Research Techniques

Heather Wright Karlson - UX Consultant, UXC Bentley University
Mélanie St. James - Associate Director, Tufts University
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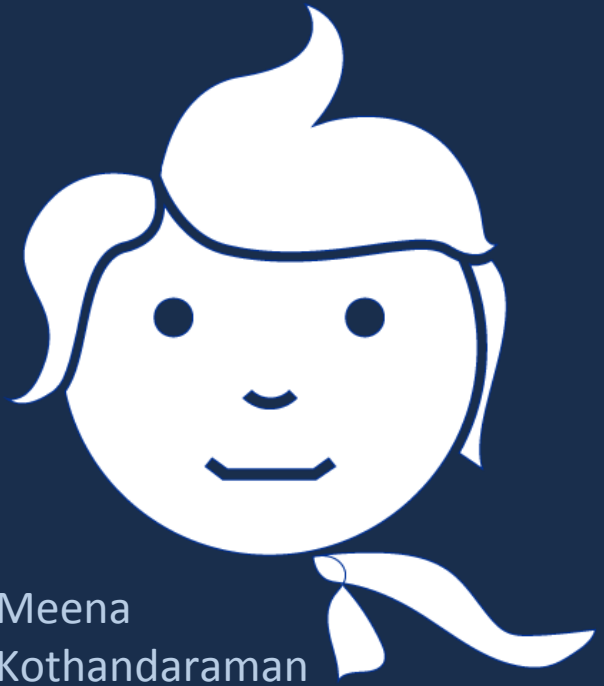
The Emoji Method - Heather Wright Karlson

The Mapping Method – Mélanie St. James

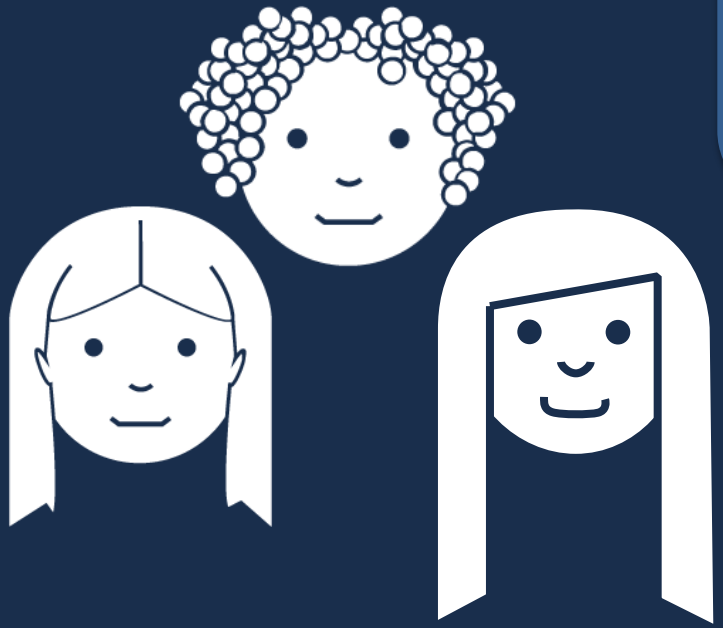
The Remote Shop Along - Erin Freeburger

MEENA'S CHALLENGE



Meena
Kothandaraman

Experiment with research techniques! Come back to share!



Challenge accepted!

Approach

We gave ourselves permission to tinker or try something new

Heather: Evolve a methodology

Melanie: Flip it around!

Erin: Tinker with an existing approach

The Emoji Method

Heather Wright Karlson

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WHAT IS GOING ON IN THERE?

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METHODS

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MICROSOFT PRODUCT REACTION CARDS

- Review
- Usage
- Challenges

The complete set of 118 Product Reaction Cards				
Accessible	Creative	Fast	Meaningful	Slow
Advanced	Customizable	Flexible	Motivating	Sophisticated
Annoying	Cutting edge	Fragile	Not Secure	Stable
Appealing	Dated	Fresh	Not Valuable	Sterile
Approachable	Desirable	Friendly	Novel	Stimulating
Attractive	Difficult	Frustrating	Old	Straight Forward
Boring	Disconnected	Fun	Optimistic	Stressful
Business-like	Disruptive	Gets in the way	Ordinary	Time-consuming
Busy	Distracting	Hard to Use	Organized	Time-Saving
Calm	Dull	Helpful	Overbearing	Too Technical
Clean	Easy to use	High quality	Overwhelming	Trustworthy
Clear	Effective	Impersonal	Patronizing	Unapproachable
Collaborative	Efficient	Impressive	Personal	Unattractive
Comfortable	Effortless	Incomprehensible	Poor quality	Uncontrollable
Compatible	Empowering	Inconsistent	Powerful	Unconventional
Compelling	Energetic	Ineffective	Predictable	Understandable
Complex	Engaging	Innovative	Professional	Undesirable
Comprehensive	Entertaining	Inspiring	Relevant	Unpredictable
Confident	Enthusiastic	Integrated	Reliable	Unrefined
Confusing	Essential	Intimidating	Responsive	Usable
Connected	Exceptional	Intuitive	Rigid	Useful
Consistent	Exciting	Inviting	Satisfying	Valuable
Controllable	Expected	Irrelevant	Secure	
Convenient	Familiar	Low Maintenance	Simplistic	

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NEW METHOD

REQUIREMENTS

- Little or no cost
- Easy to use
- Flexible
- Primarily visuals rather than words

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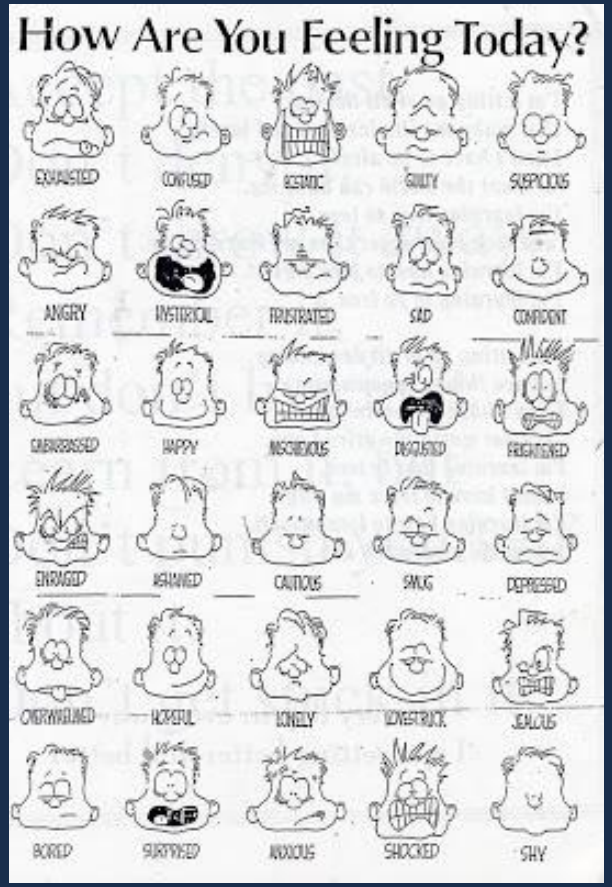
BEYOND UX



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AN IDEA

- Familiar to most
- Accessible
- Little or no cost
- Easy to use
- Flexible
- Room for individualized meaning and interpretation

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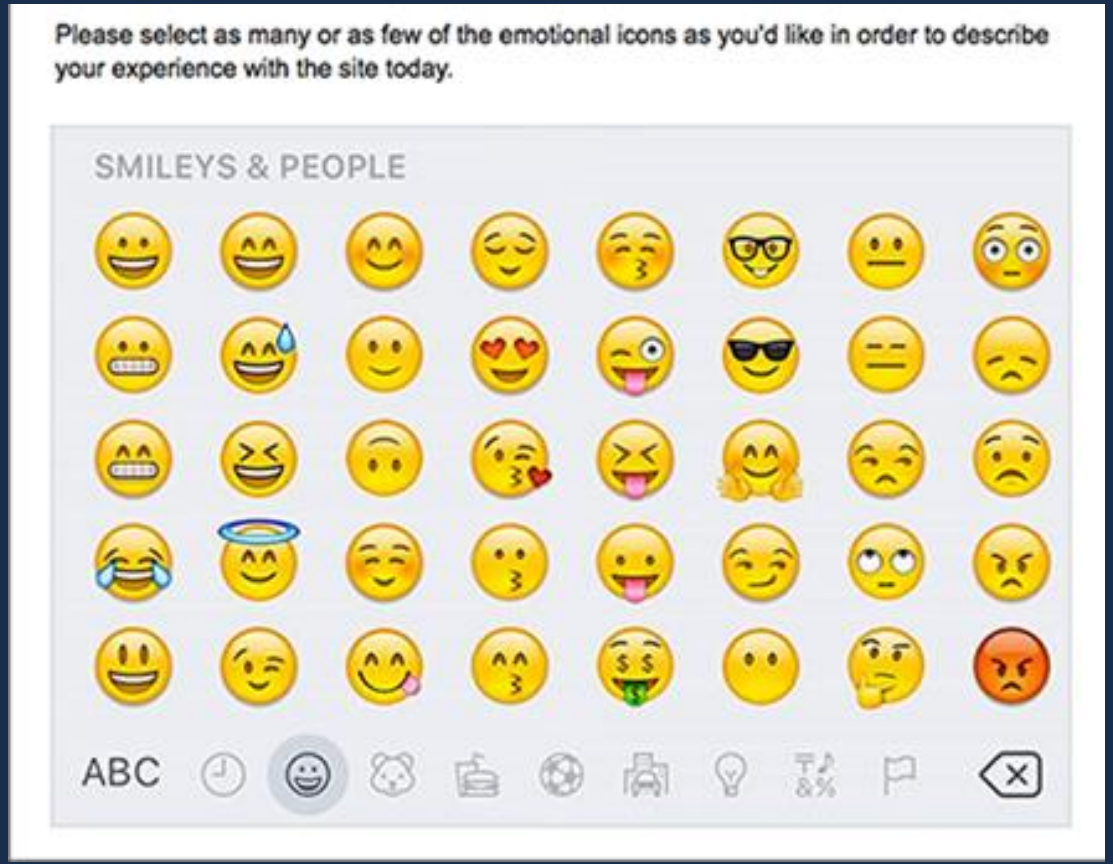
TRYING IT OUT



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BENEFIT

“I’m proud to get a loan.”

“I’m in the money. I got approved.”

“They are an angel because they gave me money.”

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CHALLENGES

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POTENTIAL & LESSONS LEARNED

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What can you re-combine from your past experience?

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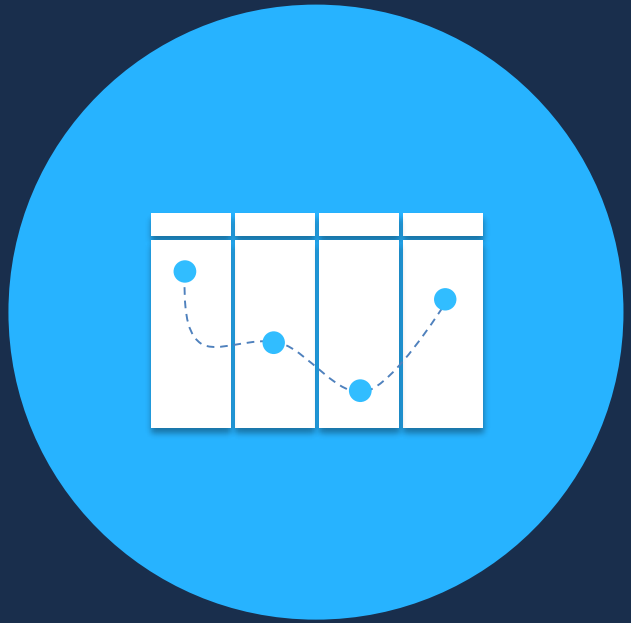


The Mapping Method
Mélanie St. James

Tufts

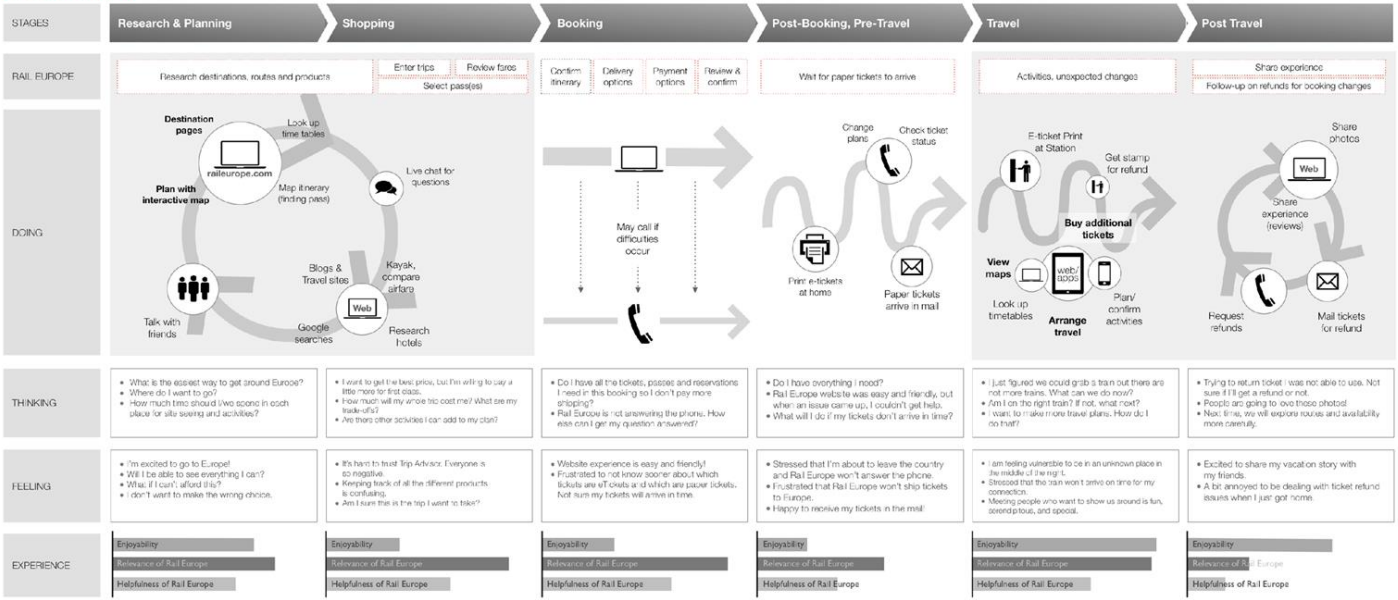
TRAIN OF THOUGHT #1

Rail Europe Experience Map

Guiding Principles

People choose rail travel because it is convenient, easy, and flexible.	Rail booking is only one part of people's larger travel process.	People build their travel plans over time.	People value service that is respectful, effective and personable.

Customer Journey



Opportunities

GLOBAL

Communicate a clear value proposition. STAGE: Initial visit	**Help people get the help they need.** STAGES: Global	**Support people in creating their own solutions.** STAGES: Global
Make your customers into better, more savvy travelers. STAGES: Global	**Engage in social media with explicit purposes.** STAGES: Global	

PLANNING, SHOPPING, BOOKING

Enable people to plan over time. STAGES: Planning, Shopping	**Visualize the trip for planning and booking.** STAGES: Planning, Shopping	**Arm customers with information for making decisions.** STAGES: Shopping, Booking
Connect planning, shopping and booking on the web. STAGES: Planning, Shopping, Booking	**Aggregate shipping with a reasonable timeline.** STAGE: Booking	

POST-BOOK, TRAVEL, POST-TRAVEL

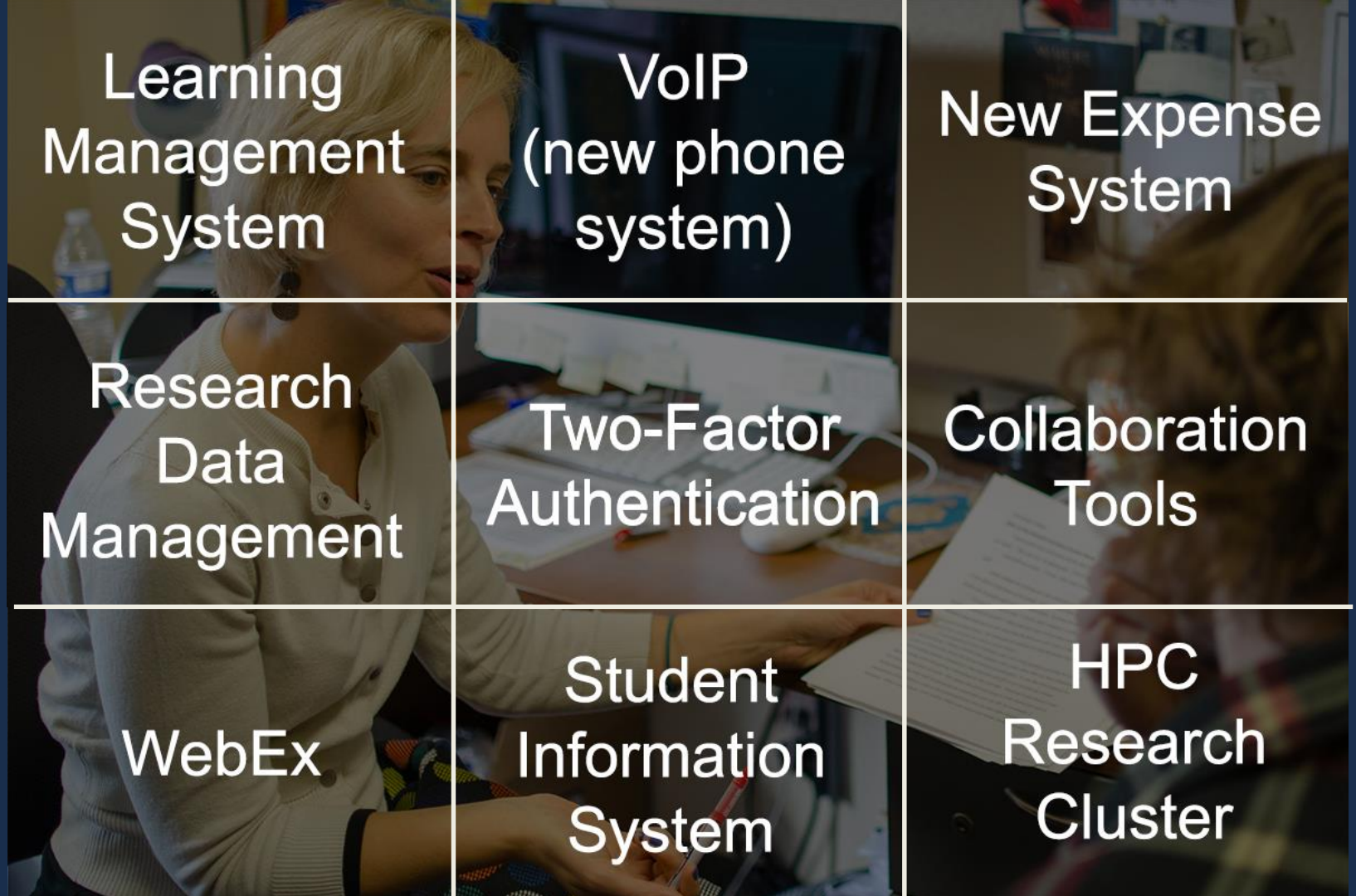
Improve the paper ticket experience. STAGES: Post-Booking, Travel, Post-Travel	**Accommodate planning and booking in Europe too.** STAGE: Traveling
Proactively help people deal with change. STAGES: Post-Booking, Traveling	**Communicate status clearly at all times.** STAGES: Post-Booking, Post Travel

Information sources

Stakeholder Interviews	Customer Experience Survey
Cognitive walkthroughs	Existing Rail Europe Documentation

Ongoing, non-linear · Linear process · Non-linear, but time based

TRAIN OF THOUGHT #2


Learning Management System
VoIP (new phone system)
New Expense System
Research Data Management
Two-Factor Authentication
Collaboration Tools
WebEx
Student Information System
HPC Research Cluster

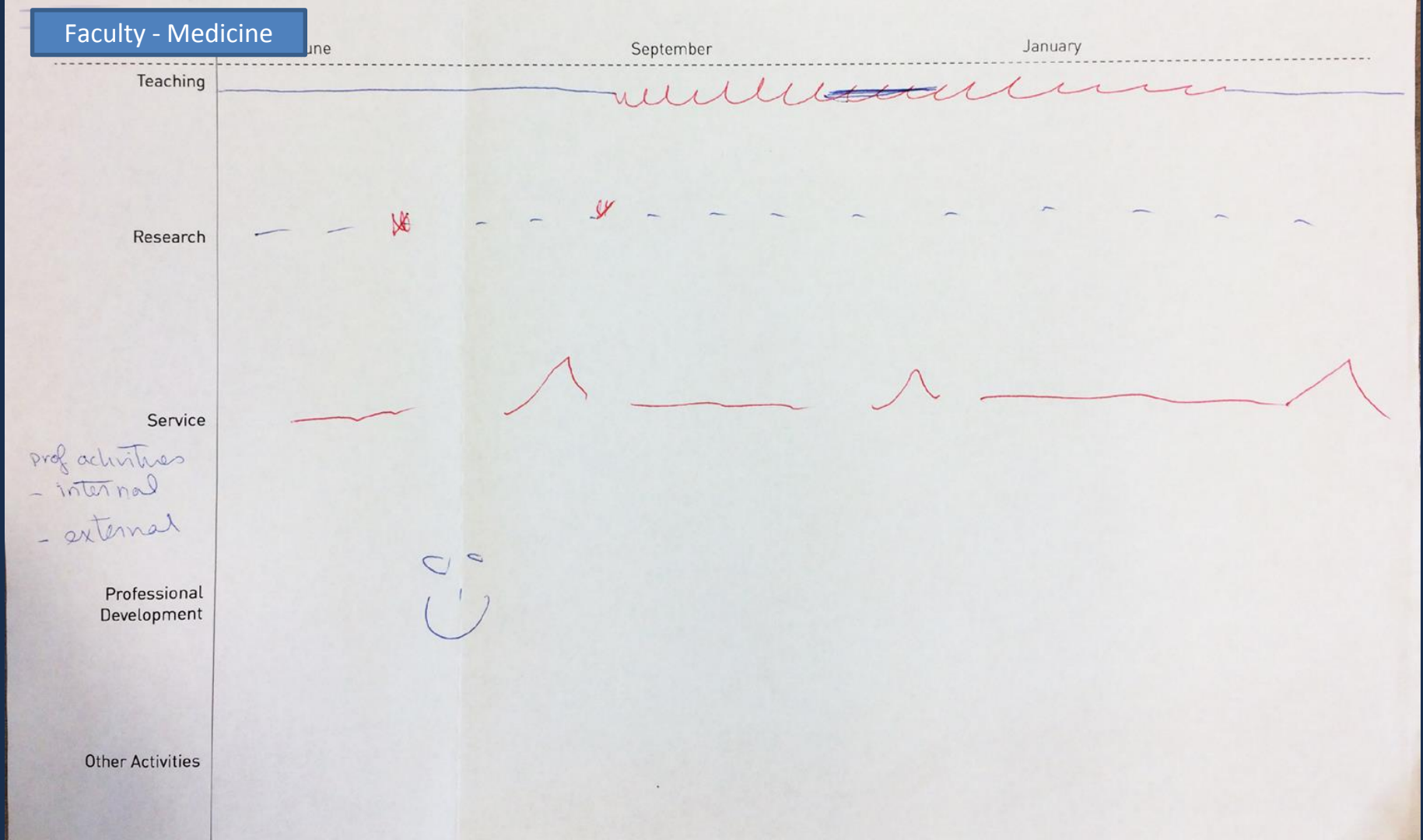
- Teach
- Advise
- Conduct research / Run a research lab
- Publish
- Write grants
- Continuing Medical Education (CME)
- Serve as department chair
- Serve on university committees
- Co-chair conferences

	June	September	January
Teaching			
Research			
Service			
Professional Development			
Other Activities			

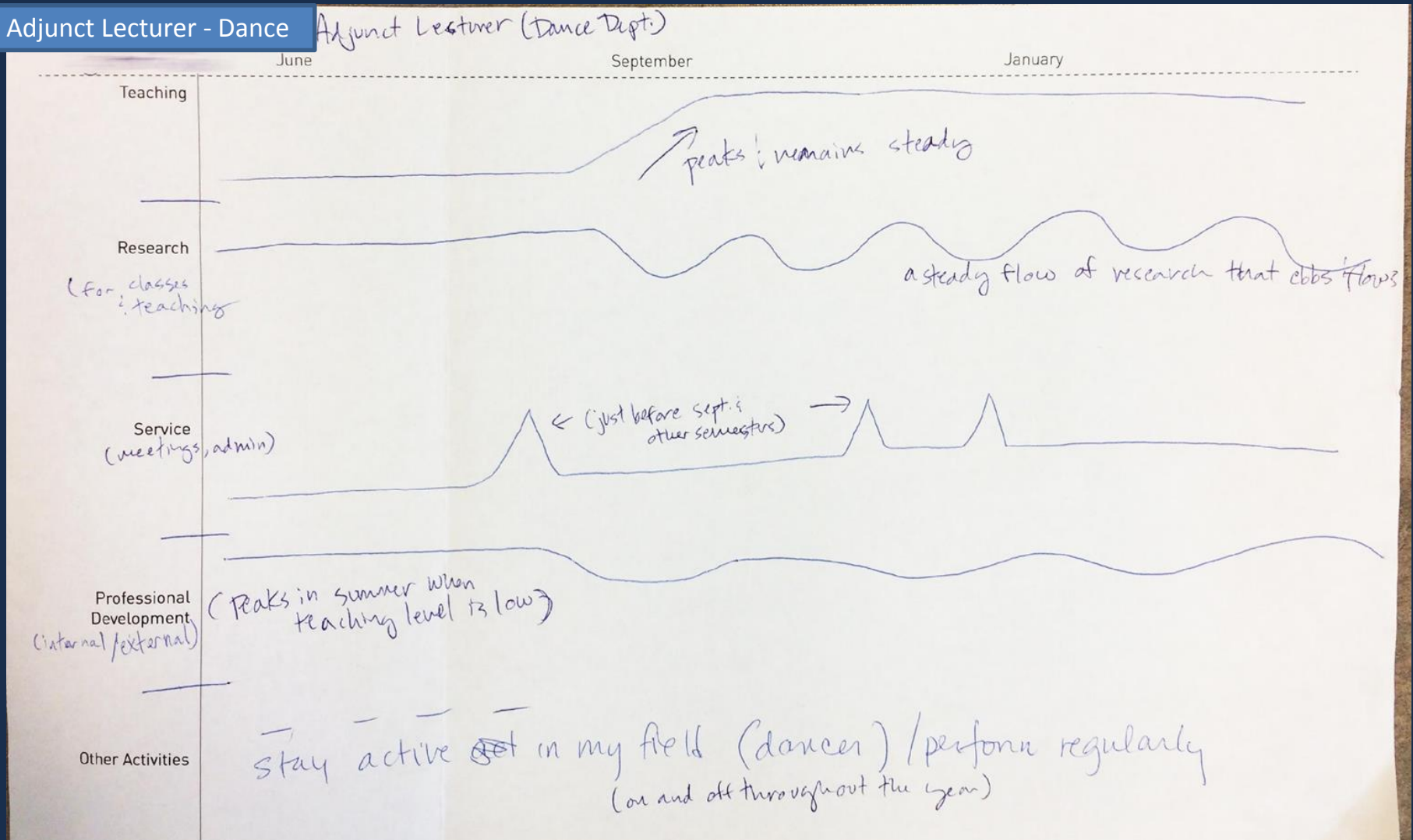
METHOD

- Use this sheet to describe the type of activities you do during the year
- Use a blue pen when you feel calm
- Use a red pen when you feel stress

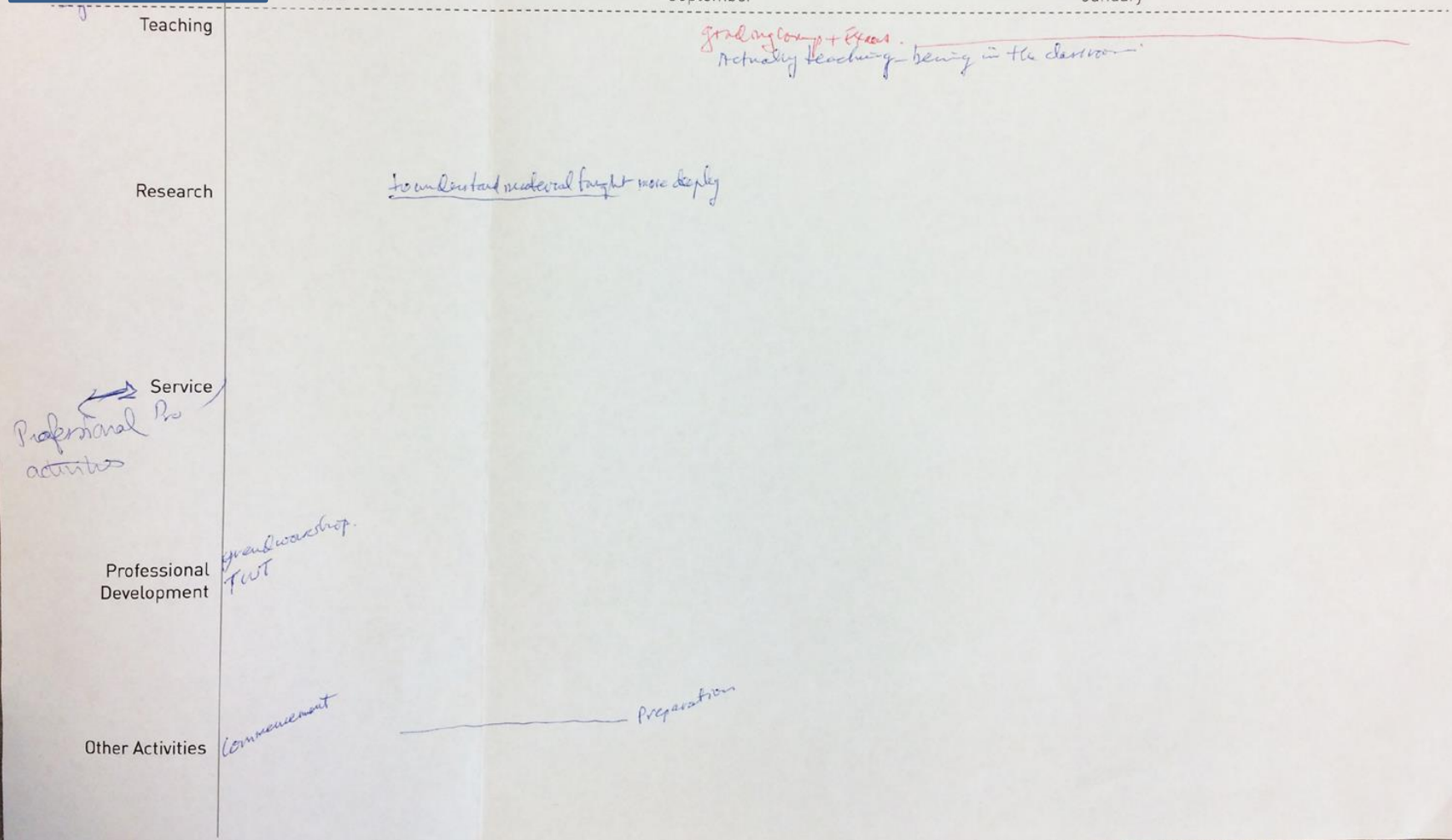
Faculty - Medicine



Adjunct Lecturer - Dance



Lecturer - Spanish



BENEFIT

- 2x P: playful, welcome relief from a traditional interview.
- 1x P: awkward, but created a good launching pad for a narrative.

BENEFIT

- A framework to explore the “big picture”
- Participants can talk about what I might not think of asking them

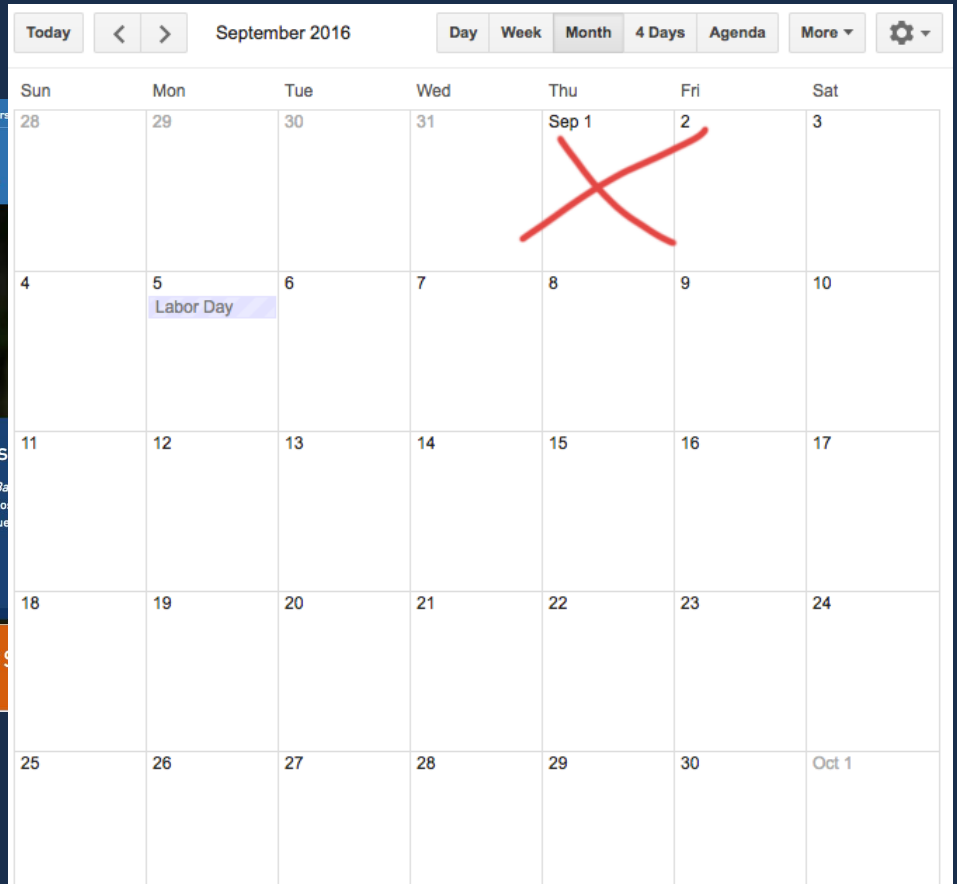
CHALLENGE

- Might be a little too unstructured
- Not all participants feel comfortable “doodling”

OUTCOMES & LESSONS LEARNED

- Technique might be more effective in disciplines with visual or graphical components
- But maybe it’s not the resulting map that matters, but the conversation it facilitates

OUTCOMES & LESSONS LEARNED



What will be your inspiration?

The Remote Shop Along
Erin Freeburger

- ✓ Product
- ✓ Packaging
- ✓ Marketing Display

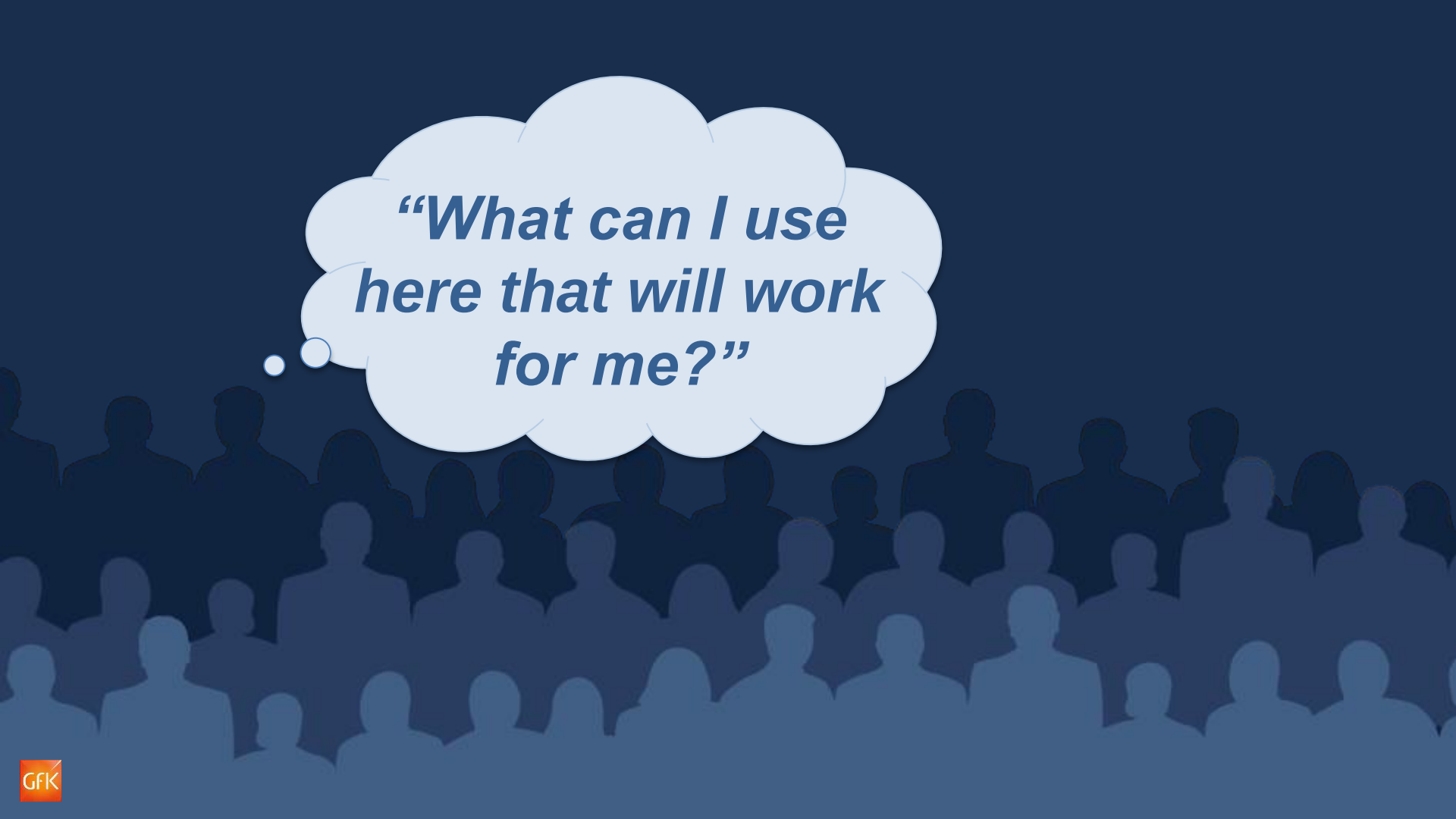
Experience?

Perception?

Actual retail store?

SHOP ALONG 1.0

Shop Alongs are a common **market research** technique.


“What can I use here that will work for me?”

THE 2 PART SOLUTION

Part 1: In Store

App-based Scavenger Hunt

What??

Part 2: At Home

Phone Call In-Depth Interview

Why?!

PRIVACY

extra level of privacy

OBSCURITY

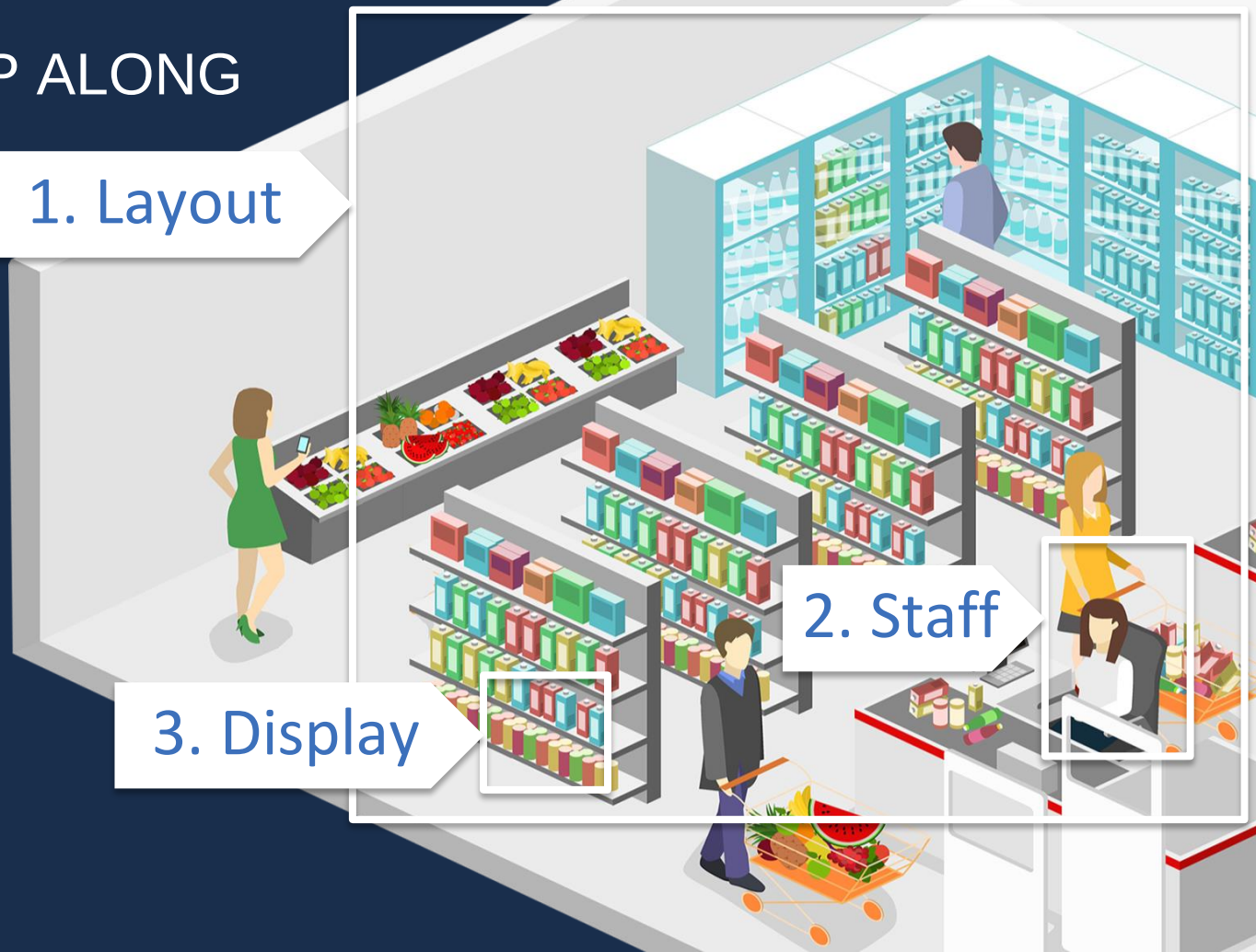
a more
authentic interaction
between people

GLOBAL

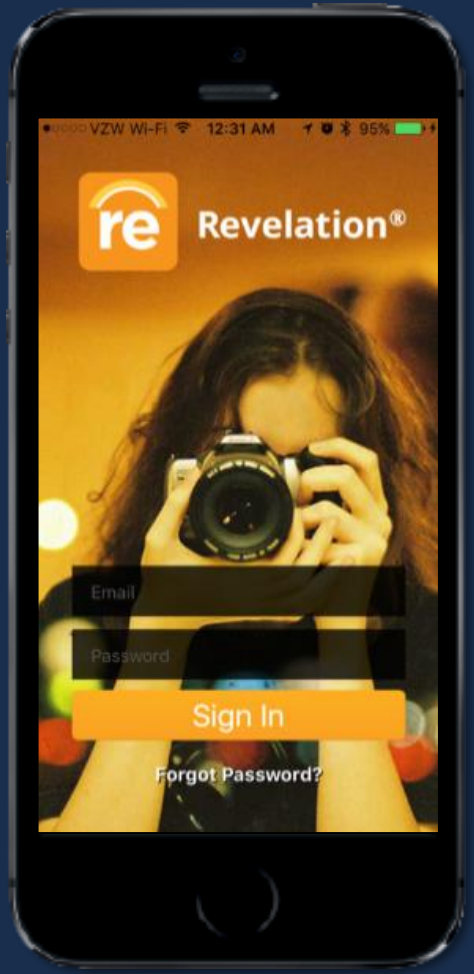
Be **anywhere and everywhere**
at the same time

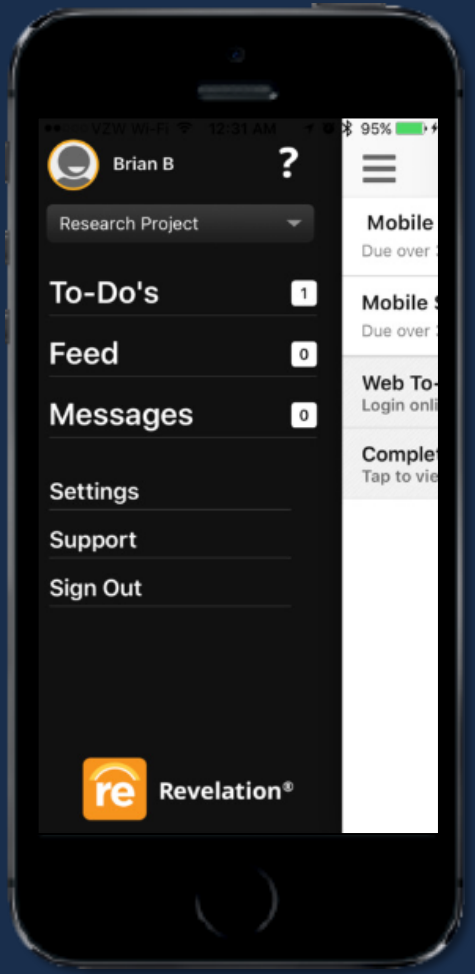
THE SHOP ALONG

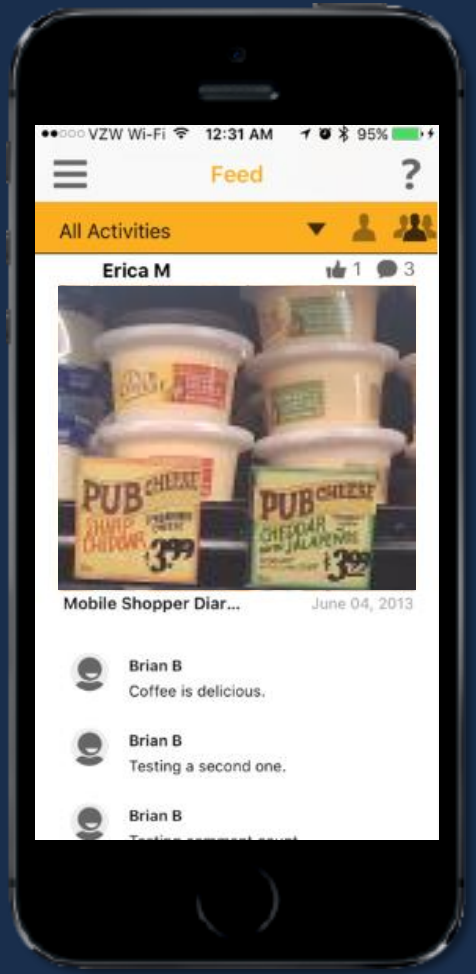
3 key areas of focus



Pecorino Romano & Parmesan grated
Parmesan Cheese grated
Pecorino Romano grated
PUB CHEESE SHARP CHEDDAR SPREADABLE CHEESE $3.99
PUB CHEESE CHEDDAR WITH JALAPEÑOS $3.99
PUB CHEESE CHEDDAR WITH HORSERADISH $3.99
Crumbled Blue Cheese $3.49
CRUMBLED GORGONZOLA $3.49
crumbled Goat Cheese 2.49
Mascarpone 2.99
SOFT SPREADABLE Light Cream Cheese 2.99
ORGANIC LIGHT WHIPPED CREAM CHEESE 2.99
Light Whipped CREAM CHEESE $1.99
Whipped CREAM CHEESE 1.99
Vegan Cream Cheese 2.49
CREAM CHEESE 1.69
light Cream Cheese 1.69
WISCONSIN EXTRA SHARP CHEDDAR
CALIFORNIA MILD CHEDDAR
ORGANIC PEPPER JACK 3.49
ORGANIC MONTEREY JACK 3.79
New Zealand organic Cheddar 4.29
COLLIER'S WELSH CHEDDAR
ENGLISH COASTAL CHEDDAR
RAW MILK EMMENTALER CHEESE AGED OVER 100 DAYS
RAW MILK LE GRUYÈRE
Gruyère Cheese AGED 6 MONTHS
CHEDDAR & GRUYÈRE mélange
Cheddy Jacks
Monterey Jack
havarti
ORGANIC AMERICAN SLICES 3.99
SOY SLICES CHEDDAR FLAVOR 2.99
SOY CHEESE MOZZARELLA STYLE 2.99


VZW Wi-Fi 12:31 AM 95%
Revelation®
Email
Password
Sign In
Forgot Password?

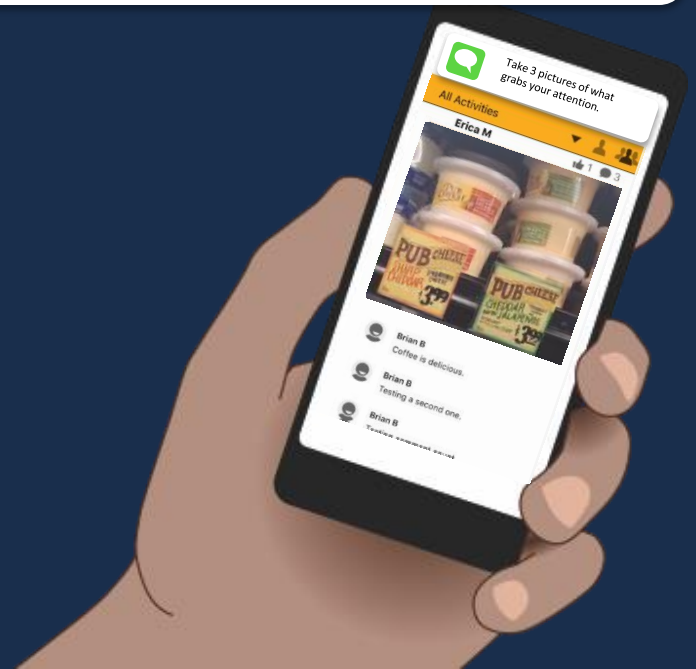

Brian B
Research Project
To-Do's 1
Feed 0
Messages 0
Settings
Support
Sign Out
Revelation®
Mobile
Due over
Mobile
Due over
Web To-
Login onli
Comple
Tap to vie


VZW Wi-Fi 12:31 AM 95%
Feed
All Activities
Erica M
1
3
PUB CHEESE
PUB CHEESE
Mobile Shopper Diar...
June 04, 2013
Brian B
Coffee is delicious.
Brian B
Testing a second one.
Brian B

TYPES OF QUESTIONS

- Take a Picture
- Short Answer
- Multiple Choice

Take 3 pictures of what grabs your attention.

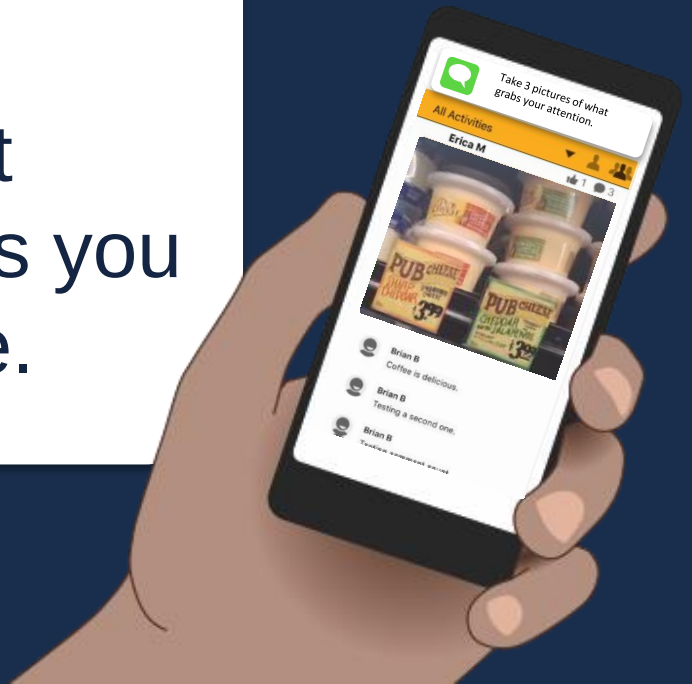


THE SHOP ALONG

TYPES OF QUESTIONS

What grabs your attention?

Take 3 photos of what stands out the most as you walk through the store.



Certified
American
GROWN

Do you enjoy shopping here at TRADER JOE'S?
WE'RE HIRING!
Seeking friendly, upbeat, physically active people to join our diverse crew.
"Your work day will never be dull!"
ASK ANY CREW MEMBER FOR INFO
"Everybody does everything!"
Do you have an artistic flair?
Our crew could use your hand-lettering skills to help create our unique store signs!
1.99 each
R JOE'S

TRADER JOE'S
Sriracha
Potato Chips
Lattice Cut
Kettle Cooked
TRADER JOE'S
Sriracha
Potato
Lattice Cut
Kettle Cooked
Sriracha Potato Chips
5.23
2.29
$2.99

the Pewter Spoon
try Something New... at TRADER JOE'S
taste, Sip & be Merry!!!
Kung Pao Chicken 4.99
Dark Meat with Vegetables in Spicy Soy Ginger Sauce
VERY HOT
EXIT
Restrooms
ACCESSIBLE
Before Placing your order Please inform your Server if a Person in your Party has a Food Allergy

SHORT ANSWER

How would you describe Pub Cheese in 3 words?

“Creamy.”
“Delicious.”
“Orange.”

“Bright Orange.”
“Unnatural.”

“It’s very Orange.”

“Orange, creamy, easy.
(insert Trump joke here)”

“Not for me.”

MULTIPLE CHOICE

What was it that gave you this impression?

Choose all that apply.

- ✓ The overall display
- ✓ The product signage
- ✓ The product itself
- ✓ The store rep
- ✓ Something else

How likely is it that you will buy this product based on what you've seen today?

- Not at all likely
- Not very likely
- Neutral
- Somewhat likely
- Very likely

Meanwhile, back at my desk…

Revelation®

Snack Attack

- Overview
- Messages
- Explore
- Findings

Overview

What's new and completion stats. Learn more

What's new

RECCURRING
Snack Moments Diary
2m 1

ONE TIME
Hello and Welcome!
2m

ONE TIME
Hello and Welcome!
2m 1

Messages

View all | Compose

From	Subject	Sent

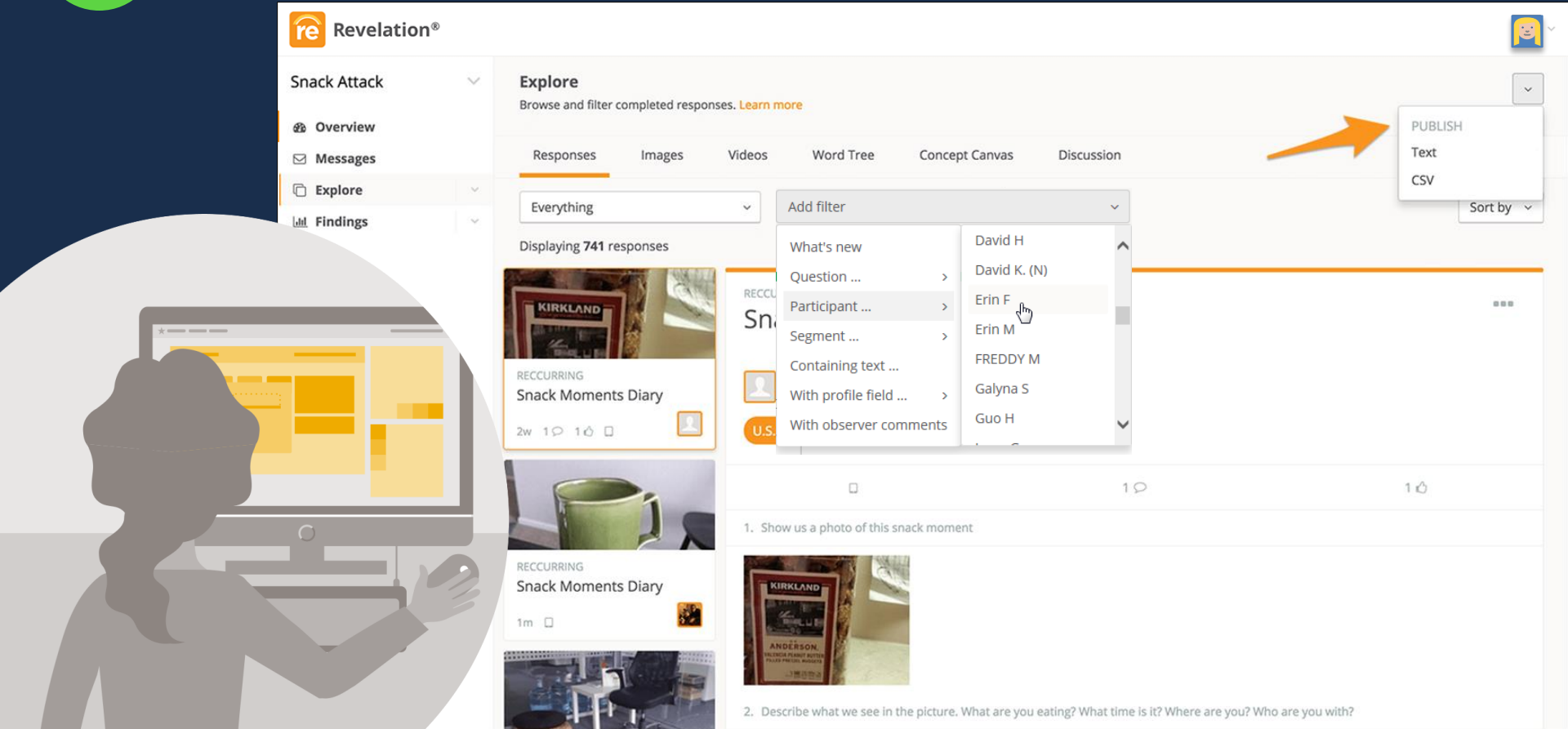
Completion

Publish grid

Completion by: Activity | Show me: Everything

Activity	Completion	Response Rate
Hello and Welcome!	16 / 146	11%
Snack Stash	17 / 74	23%
Snack Moments Diary	47 / 73	64%
Healthy Grain Package	29 / 148	20%

Meanwhile, back at my desk…



THE PHONE CALL

FEEDBACK

What I see…

FEEDBACK

After speaking to the participant…

FEEDBACK

What I see…

FEEDBACK

After speaking to the participant…

FEEDBACK

What I see…

FEEDBACK

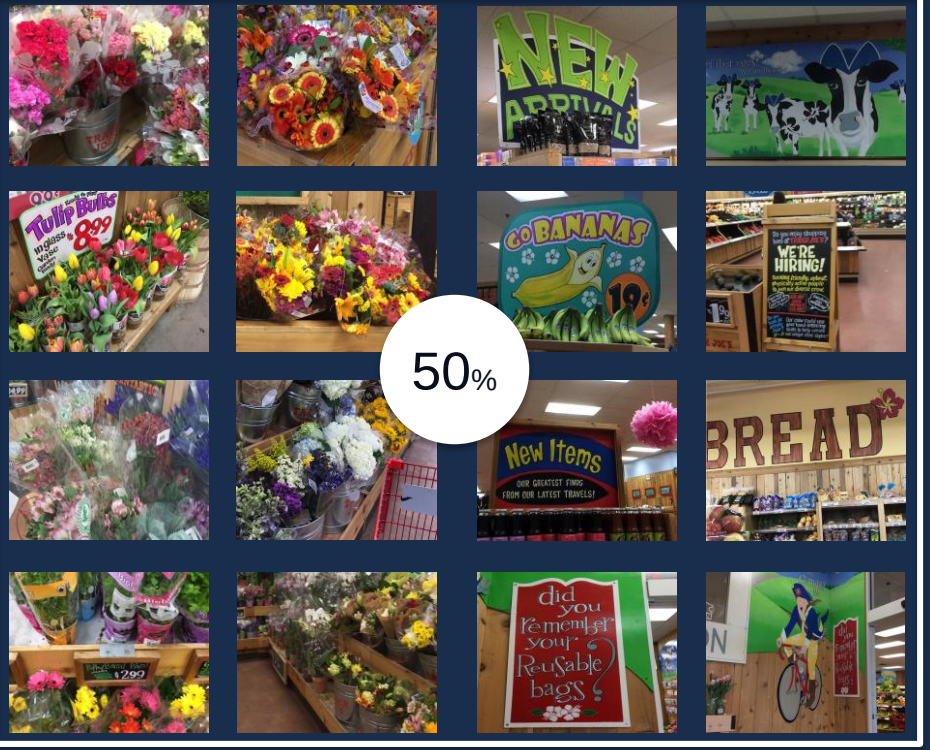
What else I see…

Insight

DATA ANALYSIS

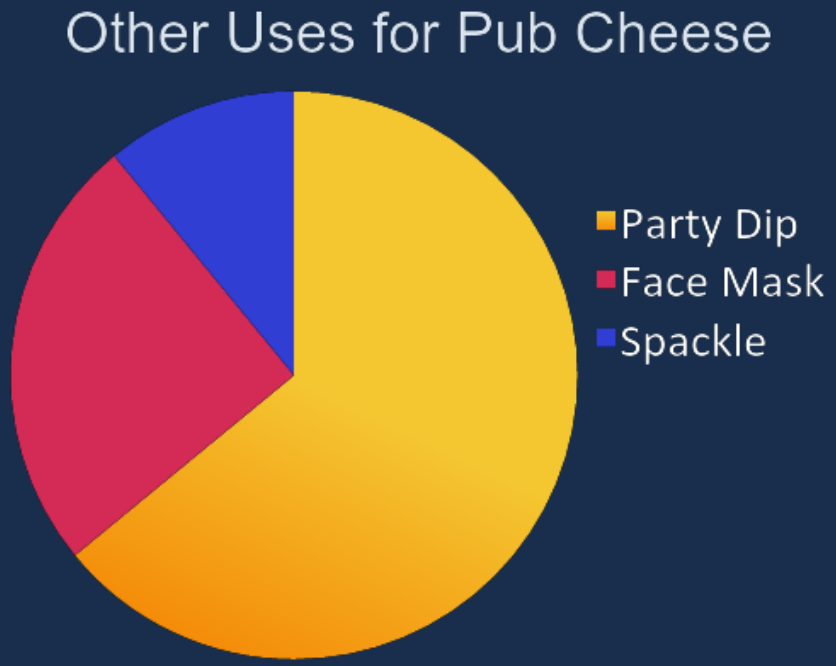
What do people see?

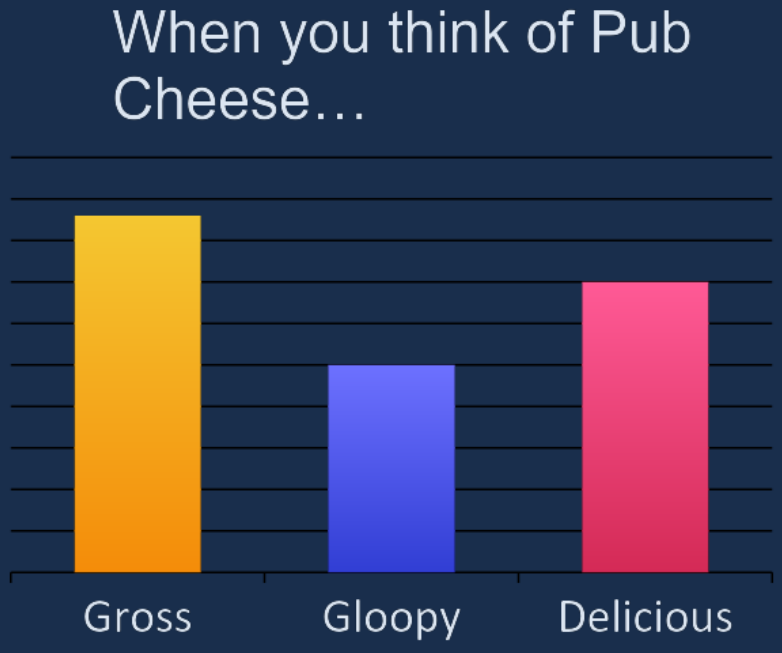
FLOWERS	SIGNS	SNACKS	DRINKS	FREEBIES	ETC.



BRIGHT
Easy
HANDY
It's very
ORANGE
Creamy
Delicious
Midwest
Unnatural

MULTIPLE CHOICE





SOFTWARE TOOLS

Try this at home!

marc

FIELD AGENT

Revelation by FocusVision™

mfour

Purchased

e-FocusGroups
Market Research Insights... At The Speed of Now

FREE DIY

A Smartphone & Email

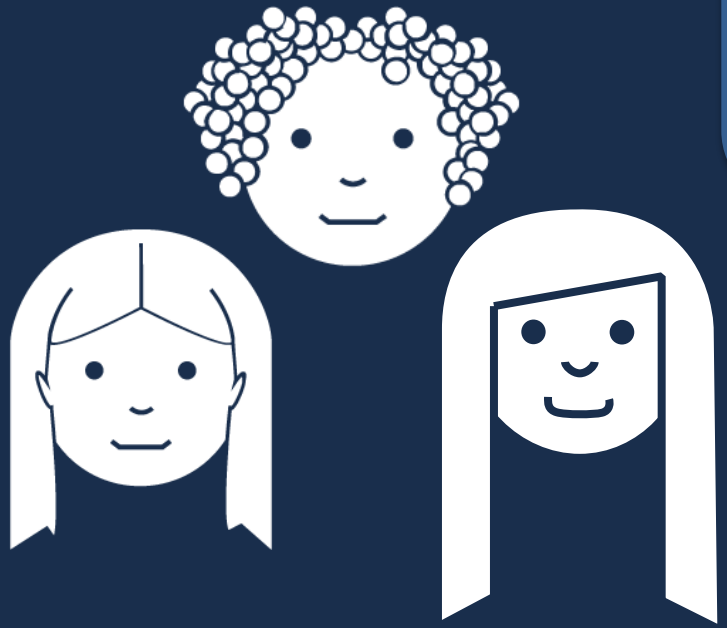
Thank you, team!

RECAP & REMIX

The Emoji Method - Heather Wright Karlson

The Mapping Method – Melanie St. James

The Remote Shop Along - Erin Freeburger



Now your turn!

Our UX Community is:

- talented
- generous
- creative

Let’s evolve together our UX and methods!

Ideas? Comments?

Thank YOU!
See you next year!

Heather Wright Karlson - UX Consultant, UXC Bentley University
Mélanie St. James - Associate Director, Tufts University
Erin Freeburger - Sr. UX Lead Specialist, GfK