It's Our Research

Getting Stakeholder Buy-in for User Experience Research Projects

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TOMER SHARON

Foreword by Rolf Molich

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To my life, Iris.

To my boys, Segev and Sella. I love you to the moon, sky, stars, sun,

clouds, and back.

PRAISE FOR *IT'S OUR RESEARCH*

"There is probably no question that I am asked more often than "How can I have more influence?" User research that isn't able to bring insight and drive improvement might as well not have happened. This book is the most complete guide to getting stakeholder buy-in that I have seen. It is a 'must read' for researchers and their managers."—**Arnie Lund, Microsoft**; **Author**, *User Experience Management*

"Tomer Sharon's book is the cure for usability professionals whose work isn't having the impact it deserves. Here you'll find ways to work different, to make your research connect with stakeholders instead of trash cans. File under: work smarter, not harder."—**Gerard Torenvliet, Senior Human Factors Scientist, Medtronic**

"*It's Our Research* should be required reading for anyone involved in a UX research study. Sharon will not only help you avoid the many pitfalls that most UX research projects come across, but more importantly give you all the tips and tricks for getting the most out your UX research."—**William Albert, Bentley University; Author,** *Measuring the User Experience* **and** *Beyond the Usability Lab*

"As an experienced Human Factors Engineer, I thought I knew how to do user research and engage stakeholders. But in these pages I discovered new ways to ensure my user research will be useful to my clients. The book is well organized and includes rich interviews and case study content. I especially appreciated the takeaways at the end of each chapter."—**Stan Caplan, President, Usability Associates, LLC**

"If no one reads your report or implements your recommendations does it really matter how statistically valid your findings were? Do yourself and your users a favor … read Tomer's Book."—**Jeff Sauro, Principal Measuring Usability LLC; Author,** *Quantifying the User Experience*

CONTENTS

5 THE SINGLE BIGGEST PROBLEM IN COMMUNICATION IS THE ILLUSION THAT IT HAS TAKEN PLACE 149
Strategies and tools to effectively communicate research results by using reports, presentations, and more cool stuff

6 YOU CAN'T MANAGE WHAT YOU DON'T MEASURE 209
Signs that indicate research is being used well and how you can systematically track success (or failure)

FOREWORD

By Rolf Molich

Have you ever heard the sayings "The cobbler's children have no shoes" or "The plumber has leaky faucets"? Have you smiled at them, assuring yourself that most usability professionals are far above such trivial, conventional problems?

I have bad and good news for you.

The bad news is that my research shows that a considerable number of products produced by usability professionals are hard to use or don't meet their users' needs. I've encountered unusable usability test reports, unusable personas, unusable interview reports, and unusable websites of companies who sell usability services. And even worse than that: some of us are not very good at selling and communicating our knowledge and our deliverables to people who are not usability professionals.

The good news is that some people are starting to discuss these problems openly. The book that you have in your hands right now, *It's Our Research*, is one of the important milestones on the road to making usability products truly usable and increasing their impact.

As good usability professionals, we must respect and follow the rules that we preach to others, including knowing your users, designing with your users, and iterating.

By "users," I don't mean end users. End users are very important, of course. But even more important for your success are the direct users of your deliverables: the development team, the marketing team, your management team, and so on.

Usability is maturing. Twenty years ago, Joe Dumas, Ginny Redish, and Jeffrey Rubin advanced the usability testing field when they almost simultaneously

published *A Practical Guide to Usability Testing* (Dumas and Redish, originally published in 1993) and *The Handbook of Usability Testing* (Rubin, 1994).

Today, I have a whole bookshelf of literature about usability testing and user research. Specialized usability testing books like *Moderating Usability Tests* by Dumas and Loring (2008) and *Remote Research* by Bolt and Tulathimutte (2010) are starting to appear, indicating the need for our services.

But it's not just the usability profession that is maturing. The consumers of usability products are maturing, too. Some of our users are getting so mature that they no longer accept just anything in the name of usability. They demand quality. In response to bad experiences with professional usability services, they define rigorous and reasonable standards for usability testing, expert reviews, interviews, personas, and more. They set up extensive quality assurance programs to ensure that they get what they pay for. You can no longer do whatever you want in the name of usability.

It's a widespread myth that people who criticize usability are evil or irrational enemies of a good cause. Sure, I've met people who fanatically believed things like, "Cowboy programmers don't need no stinkin' usability," or "If it was hard to code, it must be hard to use," or "You can't teach a pig to sing — and trying to just annoys the pig" (about users' inability to learn to use an unusable website). But my experience is that a majority of the people who criticize my work are not just right – they are also acting in the best interest of all of us. Usability professionals make mistakes – and they are not always good at iterating: listening openly to feedback from others, learning from their mistakes, and applying their own methods to themselves in order to improve their work practices.

This book, *It's Our Research*, fills a gap on my bookshelf. Other books have assumed that once you've carried out a usability activity, the results will sell themselves. Tomer Sharon has done a great job of compiling useful wisdom on how to make usability useful and usable. He has interviewed a large number of knowledgeable people and combined his findings with his own great insight.

The contents of this book can be summarized in seven words: do as you preach and be humble. If that's not sufficiently usable for you, and you want more details, read on!

ACKNOWLEDGMENTS

Authoring a book is an amazing experience. It would not have been possible without many good people who lent a hand. Their names belong on the cover as much as mine.

It all started in downtown Portland, Oregon, thanks to Daniel Szuc and Josephine Wong. I joined you for lunch – and see what happened. Dan, our conversations helped me overcome many blocks. Thank you.

It continued with the persistence of Morgan Kaufmann's acquisition editor, Mary James, who showed me the way.

My reviewers were amazing. They gave me confidence and excellent advice and spanked my behind when I needed it. Thank you to Gerard Torenvliet, Bill Albert, Jeff Sauro, and Stan Caplan. This book is excellent because of you and bad because of me.

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Thank you to Gary Bunker for allowing me to include The Usable Planet in the book.

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Thank you to Gustavo Moura, Manu Cornet, and Nate Bolt for allowing me to use your pictures and comics and to Josephine Wong, Joseph Marburger, Joshua Ledwell, Tawheed Kader, Livia Labate, Arnie Lund, and Scott Berkun for your tweets.

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Last, Iris. You are the love of my life. This book would have remained a dream without your support. For that I thank you from the bottom of my heart. I look forward to many more years of making our dreams a reality. I hope not too many of them involve alarm clocks going off at 4:00 a.m.

#humbled

ABOUT THE AUTHOR

Tomer is a user experience researcher, speaker, writer, and leader. He is working at Google in New York, supporting Google Search with UX research. Previously, he led the user experience research effort for Google's online advertising management platform, DFP (Doubleclick for Publishers). Prior to Google, he worked as a user researcher at Check Point Software Technologies in Israel. As founder and first president of UPA Israel, he led the chapter to many achievements such as raising awareness of the need for easy-to-use, efficient, and fun technology products and growing and nurturing a professional community of 1,000 practitioners.

Tomer is an experienced speaker at local and international conferences, a published author of articles and papers, and a past editorial board member for UPA's *UX Magazine*.

His taste in music includes Coldplay, Green Day, the Fray, the Killers, the Postal Service, Snow Patrol, and U2. He is a Boston Red Sox and Hapoel Tel Aviv fan, and an ex-paraglider.

Tomer holds a BA in Social Sciences from the Open University and a master's degree in Human Factors in Information Design from Bentley University in Waltham, Massachusetts.

LIST OF FIGURES AND TABLES

Figures

Tables

CASE STUDIES

Chapter	Author	Title	Country	Page
3	Bill Albert	A conversation about numbers	United States	95
3	Shmuel Bollen	The cost of finding documents	United States	96
4	Yoram Pomer	Dealing with defensive salespeople	Israel	114
4	Steve Portigal, Julie Norvaisas	Stakeholders in the field	United States	115
4	Gregg Almquist	The power of observing real customers	United States	118
4	Kirsten Robinson	The interactive issues matrix: recording and organizing stakeholder observations	United States	122
4	Sauli Laitinen	Analyzing results together	Finland	127
4	Amir Dotan	Using personas in a workshop to get stakeholder buy-in	United Kingdom	139
4	Jakob Biesterfeldt	The power of workshops	Germany	141
4	Stephen Denning	Business, meet users . . .	Scotland	142
5	Takashi Sasaki	Why a book matters	Japan	168
5	Beverly Freeman	The ice cream presentation	United States	172
5	Tomer Sharon	Present to your biggest critic	United States	174
5	Chris Hass	The most powerful two to ten minutes of your research findings presentation	United States	178
5	Filip Healy, Roland Stahel	Visual thinking and communication	United Kingdom	180
5	Filip Healy, Roland Stahel	User experience mapping	United Kingdom	183
5	Bob Thomas	Visual survey results	United States	184
5	Sauli Laitinen	Product concept brochure	Finland	187
5	Michael Hawley	Visualizing key differences in findings	United States	188
5	Tomer Sharon	The top ten themes poster	United States	190
5	Tomer Sharon	Lostness	United States	195

VIDEOS

QR Code Number	Interviewee	Country
111	Jay Trimble	United States
112	Paul Adams	United States
113	Aza Raskin	United States
114	Donna Tedesco	United States
115	Jeff Sauro	United States
116	Jared Spool	United States
117	Leah Buley	United States
118	Cennydd Bowles	United Kingdom
119	Dana Chisnell	United States
120	Donna Spencer	Australia
121	Takashi Sasaki	Japan
122	Caroline Jarrett	United Kingdom
123	Ido Mor	United States
124	Kim Goodwin	United States
125	Rolf Molich	Denmark
126	Giles Colborne	United Kingdom
127	Meena Kothandaraman	United States
128	Whitney Hess	United States
129	Eric Ries	United States
130	Janice Fraser	United States
131	Johanna Kollmann	United Kingdom
132	William Gribbons	United States
133	Ben Shneiderman	United States
134	Chris St. Hilaire	United States
135	Gerry McGovern	Ireland
136	Bertice Berry	United States
137	Amberlight Partners	United Kingdom
138	Rabobank Group	Netherlands
139	Guy Winch	United States

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PROLOGUE

THE USABLE PLANET

Gary Bunker

Why Is This Story a Part of the Book?

I don't know Gary. We have never met. I first read this story when I was a young, inexperienced practitioner. It made me laugh and think a lot. I believe this story, ignoring for a minute how fun it is to read, delivers an important message. It demonstrates extremely well what's going to happen if user experience practitioners don't work hand in hand with stakeholders in UX research. We researchers and usability people want to make the world a better place. This story is an excellent reminder of what might happen if we work not with stakeholders but against them.

Recording 1

Day 1.

I've been asked to keep this journal, and to record everything that happens to me each day. I've had some problems figuring this little device out, but I think it's working now. Let me . . . yes, I can see the text coming up on the little screen. Okay.

Um, let me see, well, I woke up this morning in a glass tube. The last thing I remember I was in St Mary's Hospital, Portsmouth, England. Waiting to die from the illness that I'd been fighting. This morning I wake up in this bizarre cylinder . . .

I couldn't get out at first. There was a button on the inside, just above my head, but my arms were locked at my sides so I couldn't reach it. It was hours until someone walked into the room and I got their attention and they let me out.

This is going to sound crazy – at least, it sounds crazy to me – but they told me that the year was 2367! Apparently I was cryogenically frozen back in 1999, and I've

been in that tube ever since! They say they've cured the cancer and that I'm going to be fine – I can hardly believe this, but it's true – I'm just going to lie down now, I feel exhausted.

Recording 2

Still day 1, I think. I'm in a room now; it looks like a hospital room, though I don't recognize any of the machines. There's a machine that looks like it serves coffee over there, boy I could do with a good coffee – hold on a sec . . .

Beep Ow!!! Oh, you ***Beep*** machine!

Damn! Sorry, I touched the front of the machine and it spat boiling hot coffee all over me! Jeez, it's scalded my chest; it must be broken or – hold on, here comes a nurse. ***Paused***

Resumed That's better. She put some cream on it and the pain is going away now. She laughed when I told her what had happened. Apparently you have to set the direction of your cup and the type of coffee you want before you touch the panel on the front. There's buttons on the top for that, but I didn't see them. I told her that was a dumb design and pretty dangerous, but she said it was just because I haven't been around since the big change. When I asked what she meant, she said that back in 2022 there was a revolt. The programmers and designers of the world executed all the HCI (human–computer interaction) and Usability experts, and since then there had been nothing standing in the way of designers building the best products. She said I just had to get used to things being a little different.

Oh well, I'll be more careful next time – I guess I've got a lot to learn here! I still can't get over the fact that it's 2367 . . .

Recording 3

Sorry I've not recorded for a whole day, they've been testing me and asking me questions all day. It's now day 3 but the good news is that they've said I can walk around the hospital now. I'm not allowed to go outside just yet, not until I've acclimatized and they are sure there are no further problems, but just getting out of this room is going to be great! ***Paused***

Resumed Well, my first outing was less than successful. The floor I'm on is pretty much empty, but there's a lift at the end of the hall. It looked pretty much like lifts from 1999, but there's no button to call it. I stood around waiting for it until it just kind of arrived, so I got in – but there were no buttons inside.

I thought it might be voice activated, you know, like on *Star Trek*, but no matter what I said it just sat there. In the end the doors opened again, and red lights started to flash. I was pretty embarrassed so I just came back here to my room. I feel like an idiot in this place . . .

Recording 4

Okay, day 4. That lift isn't going to beat me. I asked the nurse, and she said that a personal navigator activated it. She gave me one; it's this tiny little pad that inter-acts with the building you're in. It shows you where you are, lists what's in the building and you can use it to tell the lifts where you are going. She said it's great, because you don't need to worry about floors any more; you just need to know your destination. I'm going to try it today. ***Paused***

Resumed Well, I'm ready. I've set the personal navigator to take me to the rooftop café, it's a lovely day out there – I'm off!

Uh, okay, I'm at the lift and waiting. I guess it just – oh! Here it is, okay, stepping into the lift now . . . The doors are closing . . . And we're off! This is so cool!

Going up, going up . . .

Ah. The lift has just stopped and the doors aren't opening. I must have done some-thing wrong. Let me just . . . No, I've set the destination again. I think I've got the right button, but nothing's happening. No emergency telephone. Oh ***Beep*** . . .

Okay, don't panic, don't panic. I'll just keep pressing buttons. There's no labels or anything, just funny little squiggles on them. I wish they'd tell me what all these do! I'll just keep messing around until someth—Oh! Jeez, it's going up again but it's moving pretty fast, oh way too fast! Hoooolllyyyy craaaaaaaa- ***Beep*** Ouch, oh my ***Beep*** "Violent motion will damage this device, please refrain from throwing it to the ground."

Recording 5

I am not happy.

That ***Beep*** ***Beep*** personal organizer somehow crashed the lift into the roof of the hospital! They had to call the police!!!

How the hell do they expect people to use those things? The nurses had to do some fast-talking to stop the police from dragging me away for criminal damage, then they had to fix me up again – I bounced off the roof of the lift when it hit! My head still hurts . . . I'm not going to let it beat me, though; I'm going to get that lift working if it kills me.

Recording 6

Day 7. They've told me to stay put in bed while they teach me the "basics" of life in this new world. They look at me like I'm backward or something. I hate it. But I'll prove them wrong today. They didn't take away my personal navigator, and I've been playing with it. It's hellishly hard to understand but I think I have the gist of it. I'm going to use it today and get that damn lift to take me down to the gardens. I want to be out in the open air again.

Wish me luck.

Recording 7

Okay! I'm in the lift and it's going down. There's no counter so it's hard to say, but I think we must be getting near the ground now. It's slowing down. Slowing down . . . the doors are opening!

Right! Oh . . . ***Beep***

You're not going to believe this. I didn't quite get it right; I ended up in what looks like a basement level rather than at ground. Close, but no cigar.

The lift had already closed behind me before I realized. I've been waiting for it to come back, but it must be busy. ***Paused***

Resumed Haven't got a watch but it feels like half an hour since I got here, and still no lift. What's keeping the damn thing? ***Paused***

Resumed Jeez! It's been hours and the damn lift won't come back! I've had a good look around the place but there's no other way out, and nothing I can figure out that will help me, no phones. I banged on some pipes for a while, but nobody came. I'll just have to wait for the lift. I have to remain calm.

Recording 8

Beep ***Beep*** ***Beep*** you ***Beep*** lift!!!!

Recording 9

Two days!!! Two *days* I was down there!!! I hate that lift so much!!! I'm *never* going in a lift again till the day I die!

Recording 10

Okay, I'm a little calmer now. It's day – 15, I think. They've taught me a lot of the basics, as they call it, and they say I can now go out into the world. Apparently I don't need to work and all food and services are free, so I just need to find a place to live. They're organizing an apartment for me today and I should be able to go there tomorrow. I've asked them to make sure the building has stairs.

Free at last!!!

Recording 11

Today is the day! I'm now in my own apartment! It has a fantastic view out over this city – they say it's London, though it doesn't look like it to me. Wow, this city has changed . . .

They showed me around, but it's pretty basic – a small kitchen area, a bedroom, and a large living area with a picture window looking out over the city. I'm a long way up; I think it was the 69th floor, but it's hard to tell; because of these damn

personal navigator things, they don't think floor numbers are important any more and took them all down.

So, I have a home, and I don't need money – apparently they've done away with money and taxes and everything else; everything is free. I just need to figure out what to do next . . .

Recording 12

There's a TV here! I didn't think they'd still have TV, but there's a huge one hidden in the wall. I found it when I tried to turn the lights off. Now how do you turn it on . . . ? Ah.

Hey, lovely picture! Oops. Volume is going up, I must be standing on the remote or something . . . it keeps getting louder . . . Damn! How do I . . . ?

Won't turn off! It's GETTING TOO LOUD! I CAN'T ***Unintelligible response, please rephrase your statement*** . . . "Mary, I love you, can't you see that?" . . . "But Hank, I love Starla and I'll always be hers, you must know you can't tear us apart! I'm going to live with her on Mars and raise . . . " [unintelligible] / [unintelligible] . . . ***Paused***

Resumed If I ever meet the guy who designed that TV, I'm going to ram a personal navigator so far up his ***Beep*** he'll be going up and down in lifts for months! That damn TV wouldn't turn off and wouldn't turn down, in the end the guy from next door burst in and turned it off for me. Apparently you turn it on by touch, and then the volume goes up until you say a command – "Level," I think he said. I didn't know the command, so it just kept getting louder and louder. You then operate the thing completely by voice commands. Stupid! Absolutely stupid! What the *hell* were they thinking when they designed the thing?

No more TV for me. I'm going to bed.

Recording 13

I hate this place already. I found the shower, but can I get the hot water to flow? No.

Can I find towels? No. I had to have a cold shower and then dry myself with the bedclothes. I'm not asking for help though, I've made myself look stupid enough already. I'm going to figure this century out; it can't be much harder than this, it really can't. If I can just understand how their designers think . . . ***Paused***

Resumed Next challenge. Breakfast. I'm calm, and I'm thinking rationally. There *has* to be a design process here, something that makes it obvious if I just think like them.

The food dispenser is in a corner in the kitchen. A little glass door similar to the one at the hospital, but they never showed me how to work that. I've tried voice commands but so far no luck. I've felt all over it, but no buttons or controls I can see.

Stay calm, stay calm . . . ***Paused***

Resumed Two hours. Two hours I've been working at that thing, trying to get food out of it. Not a word, not a beep.

Then it gets up, rolls across the room, and starts hoovering the floor.

IT'S A GODDAMN VACUUM CLEANER!!!

Recording 14

I haven't eaten all day and I'm starving; I'm going out to eat. There must be somewhere to eat in this city. Let me see . . . no key or lock on the door; I guess it just recognizes me like the doors at the hospital. Okay, it's a warm day, don't need a coat. I'm off!

Ah. ***Paused***

Resumed Okay, I asked for a building with stairs and this one has stairs.

Only they put me on the 69th floor, didn't they . . . Oh ***Beep***.

All right, I'm not taking the lift; I'll walk it. I'm pretty fit, and I've got all day. It's not a problem . . . really . . . ***Paused***

Resumed . . . ooooh . . . I . . . I can't walk anymore . . . Got to . . . stop . . .

Ah! Hey . . . ! Hello there . . . Can you . . . can you tell me what . . . what floor . . . this is? Oh ***Beep*** . . . I'm only on 31, I've still . . . got 31 floors to go . . . . And then I've got to climb back up 69 floors to get home! ***Paused***

Resumed Right, this is silly. I've got my breath back, though I don't think my legs will ever work right again. I have to learn how to use that lift, there's nothing else to do.

Okay, I'm at the lift. Waiting . . . it's opening, right, now my personal – oh no, I didn't bring it! Damn damn damn damn!!!!

NO! The lift's going up! NO!!!!! ***Beep*** ***Beep*** ***Beep*** ***Beep*** ***Beep*** ***Beep*** ***Beep*** ***Beep*** . . .

[unintelligible] . . . no, it's okay, I'm getting out . . . what floor is this? 82 . . . thank you . . . ***Paused***

Resumed I'm back where I started. I'm back at the apartment. But the ***Beep*** ***Beep*** door won't open for me!!! Oh man, I hate this place!!!

Recording 15

Next morning. Don't ask me what day it is, I've lost count. I haven't eaten in two days and I've just had a cold shower. Didn't bother to dry off this time. What's the point?

I had to get the neighbor to call the police for me. They did something to the lock and spent a long time laughing at me. Didn't I know that I had to set a password before I left? Didn't they have doorway passwords back in the "Stone Age"? Would I like them to arrange a babysitter for me?

The one slightly positive thing I got out of it was that I do have a food dispenser after all – it's the weird picture thing over the thing that looks like a washing machine but probably isn't. One of the cops made a doughnut and coffee while the other was fixing the door. Some things never change.

So this morning I'm going to get my breakfast at least . . . Now, how did he do it? ***Paused***

Resumed Okay, I'm getting somewhere. When I touched it, the front went black and lit up a numeric pad. I guess I must enter the code for the food I want. Now all I need is a list of codes. There must be one around here somewhere . . . breakfast here I come! ***Paused***

Resumed Okay, no codes. No ***Beep*** codes. But that's okay, I can do this. I'll just keep typing numbers in till some food pops out. Right about now I don't care what comes out; I'll eat anything. ***Paused***

Resumed I got it!!! It's lighting up inside, it's making something!!! It looks like, like . . .

Beep

Recording 16

Cat food.

Of all the codes I could have hit, I hit cat food. I've got three bowls of it so far, different flavors but all cat food. Nothing else.

And you know, I'm starting to actually look at that food . . . ***Paused***

Resumed Come on, come on . . . please!!! Give me something, anything but cat food!!!!

Beep ***Beep*** ***Beep*** ***Beep*** ***Beep*** I HATE THIS WORLD!!!

Oh, I've got to stop for a minute, my finger is killing me from poking random numbers into this thing. If I just have a cup of coffee, maybe I'll be a bit fresher, maybe I'll be able to ***Beep*** oh OW!!!!! ***Beep*** ***Beep*** you damn ***Beep*** machine I'm going to ***Beep*** your ***Beep*** right out the window! I forgot the buttons on the top again! That's it . . . you're going out the window you little piece of junk . . . where's the window catch . . . . Oh come on! Just open you – / ***Beep*** [Unintelligible] . . . "Violent motion will damage this device, please refrain from throwing it to the ground"

Addendum: London Local News

". . . And on a lighter note, a man was found dead in South London today, after apparently throwing himself from the 69th story attached to his coffee machine! I guess some people just can't handle going without that first cup of coffee in the morning!"

"Well, that's it from us. Goodnight."

INTRODUCTION

If a study has run, with no one around to hear about it, did it still happen?

WHAT IS THIS BOOK ABOUT, WHY IS THE TOPIC SO IMPORTANT, AND WHAT DOES BUY-IN MEAN?

twitter 🐦

Jotbot

If you do not care about what you do, it would be very hard to do a good job.

What is this book about?

The study was a brilliant piece of work. At least that's what I thought. The product manager and lead engineer were happy when I joined the team. When I talked with them about the study I planned, they seemed interested. We agreed on interviewing 40 people for this study that had a goal of identifying user needs and uncovering current product pain points. The product manager wanted to use the results to help develop a detailed specifications document, which will guide the development team. I planned a study that involved four groups of participants – teenagers, students, high-tech employees, and senior citizens. I prepared a detailed discussion guide, then recruited and scheduled all 40 participants. Some of them were held in our offices and some at users' homes. The product manager and lead engineer did not observe or join any of the interviews. I didn't care so much. I was so excited about this project. When I was done, I sat down to analyze the huge amounts of data. It took me three weeks to complete, and in the end I proudly published a detailed report complete with screenshots, in-context pictures of users, video highlights, quotes, findings, smart insights, and recommendations.

The results collected dust.

I gave a presentation to the entire team, during which the lead engineer and some other team members argued that my data was flawed and that they thought we should develop things other than what I was suggesting. Someone said something about the users that I interviewed and that they were not the right audience. The product manager just sat there and didn't say a word. In the following weeks, the product manager published a specification document and the team began developing the product. The document was not based on my study findings and recommendations – far from it. I heard from someone that the product manager interviewed some people, but I had no idea who, how many, or what questions were asked.

I felt really bad. Actually, a more accurate description is that I was very angry. How could they behave like that? How could this happen? Why did they not follow my recommendations? They were acting like typical product managers and engineers, I thought to myself. They just can't develop empathy toward users. All they care about is what they think.

Did you ever have similar problems? Did you ever work with product managers, engineers, or executives who did not follow your study recommendations?

This book describes a framework, strategies, and techniques for working with stakeholders of user experience (UX) research in a way that ensures their buy-in. The primary motto of this book is that stakeholder buy-in for UX research is attained by making it theirs as much as it is yours. Involving stakeholders throughout the process of planning, execution, analysis, and reporting UX research dramatically increases the chances that they will act upon its results.

Throughout the book, I use the following terms.

- **User experience research.** User experience (UX) research provides insights into the abilities and perspectives of people who use different products and services. It is the discipline that studies people, design, and how they interact with each other to achieve specific goals in different contexts. This book is limited to a rich and comprehensive treatment of user experiences for digital products and services, yet much of the discussion can also be applied to other types of user experiences.

- **A product.** "If you can drop the thing on your leg, it's a product. If you can't, it's a service" (unknown source). I don't make that distinction. When I use the term "product," I refer to desktop applications such as Microsoft Word, websites such as CNN.com, web applications such as Gmail, devices such as an iPhone, and apps such as Flipboard for the iPad. Although this book primarily discusses digital services, I also refer to products such as airplane cockpits, command and control centers of nuclear power plants, trauma patient treatment rooms in hospitals, and automobile interiors.

- **Stakeholders.** A stakeholder in the UX world is a code name for the people with whom UX practitioners work. These are our clients, whether internal or external to our organization. These are the ones who need to believe in what we do, to act upon research results, to fund and sponsor future research. We all have a stake in product development. They have a stake in UX research.

- **Buy-in.** "Consumption," "uptake," "engagement," and "buy-in" are words I use throughout this book to indicate that stakeholders use UX research, believe in it, act upon results, support it, champion it, or evangelize it. These words are not

synonyms, yet I use them interchangeably because I believe they are useful in describing how stakeholders relate to UX research.

Why was this book written?

When I meet people who practice UX research, I always ask them the same question. I ask what the top three challenges are that they face at work. Getting stakeholder buy-in for research is usually the first challenge they mention. If it's not first, it is in the top three. People have trouble persuading stakeholders to conduct UX research to begin with. They have difficulties in getting sponsorship and budget for fieldwork. They experience hostility when they try to get their stakeholders to act upon research results.

Many UX research practitioners are frustrated.

USE ONE WORD TO DESCRIBE THE BIGGEST CHALLENGE IN UX

Scott Smith, Cofounder and Usability Consultant, Neo Insight, Canada

Neo Insight analyzed the most frequent challenges mentioned in a discussion in the User Experience group on LinkedIn. We were interested to see the challenges people like us face.

The discussion started with this question: "Can you use *one word* to describe the biggest challenge in UX?" Many people responded. It is a very popular discussion on the User Experience group. The group itself is popular, with dozens of thousands of members.

At the time we made our word cloud, 537 replies had been received. We analyzed the most frequent words in people's responses and removed extraneous

comments. Respondents found it difficult to choose just one word to describe their challenge.

The main clusters focus around *user*, *design*, *understanding*, and *time*. These are like headings in the word cloud. In our analysis of the responses, many frequently used words also summarize overall challenges.

The audience and user are at the center of the challenges. In one corner are challenges related to knowing the needs of users. In other corners are challenges related to design, the business, and time. All challenges relate to understanding the user, so it is at the center. Other challenges revolve around it: buy-in, understanding, input to design, and the like.

User Experience professionals have challenging jobs!

Figure 0.1: The biggest challenges for UX people (printed with permission).

When people ask me how a typical workday looks for me, I always say that 50 percent of my time is devoted to research planning, execution, or analysis, and the other 50 percent involves politics. I constantly look for ways to get better buy-in for research. I walk a fine line between joy and frustration. Joy comes from seeing people around me consume research and its results the way I expected them to. Frustration rears its head when others completely ignore or disregard research. I now work for a company that employs many people who do what I do, which is extremely encouraging. I remember the days when I was working in companies

where research was not my full-time job. It was challenging to persuade people to sponsor and fund a research project, let alone get them to act upon its results. In many cases, I was not able to influence people to change their perception about the value of UX research. I even quit a job where they did not let me do it full time. I know many practitioners deal with similar challenges as I write these words. I also

Figure 0.2: As seen by (printed with permission from Manu Cornet, www. bonkersworld.net).
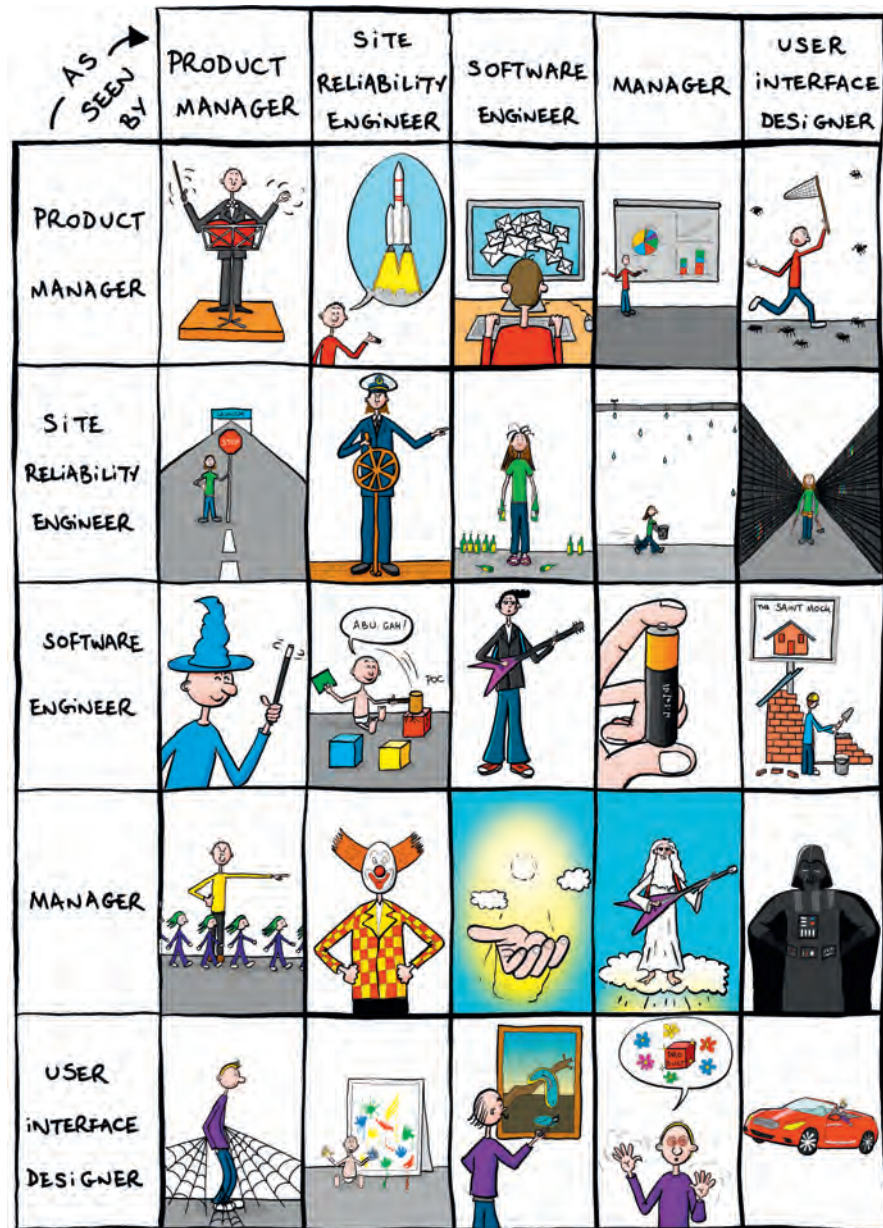
know that more and more companies and organizations now have a better understanding and appreciation for design and for research. Monty Python sang, "Always look on the bright side of life" even while being crucified (*Life of Brian*, 1979). I would also like to look on the bright side. I wrote this book to provide people who practice (or would like to practice) user experience research with strategies and techniques for getting their stakeholders' buy-in for research. I hope you use this book to get people to better appreciate research and act upon its results.

Who is this book for?

This book is for UX people who practice usability and UX research, as well as people with other job titles who try to do research as part of another job. It is also for people who try to get others to agree to do any research. The book is written from the perspective of an in-house UX researcher and is also highly relevant for self-employed practitioners and consultants who work in agencies. It is especially directed at UX teams of one and those who face no-time-no-money-for-research situations.

If your job comes with one of the following titles (or a combination thereof), this book is most likely for you:

- User experience researcher
- Usability engineer
- Design researcher
- Product designer
- User interface designer
- User experience designer
- Interaction designer
- Information architect
- User experience practitioner
- Human factors specialist
- Anyone who is doing or trying to do UX research as a part of another job

The structure of this book

This book includes six chapters ordered by the different stages of research projects. Each chapter ends with a useful list of its lessons. These takeaways are practical things you can apply in your workplace today to get better buy-in for UX research.

Chapter 1: If life gives you limes, make mojitos!

(Identifying stakeholders, selling user experience research, and dealing with difficult people and situations)

Chapter 1 describes the different roles of business, engineering, and user experience stakeholders. It looks at their perspective about UX research and identifies ways to deal with difficult people, teams, and organizations. It also discusses strategies for selling the value of UX research and presents the Lean Startup movement, which treats research as the most reasonable thing done by startups.

Chapter 2: Mmm . . . Interesting; so what exactly is it that you want to learn?

(Implementing your great participant interviewing skills on stakeholders; asking good questions, listening, saying the right things, and identifying research opportunities)

Chapter 2 is all about identifying research opportunities by developing empathy with stakeholders. The chapter introduces the most important questions to ask your stakeholders as well as tactics for handling research requests and delaying early methodology discussions. It also discusses ways to become a better listener and thinker.

Chapter 3: If you pick a methodology first, something must be wrong

(Strategies for planning studies with stakeholders and techniques for developing the right research questions)

Chapter 3 calls for detailed planning of UX research with stakeholders. It discusses research plans and how to write ones that stakeholders appreciate, focusing on the most important part of planning studies: defining goals and research questions. The chapter ends with a discussion about selecting and describing methodologies in ways to which stakeholders relate and about the power of injecting quantitative aspects into qualitative studies.

Chapter 4: What's gonna work? teamwork!

(Hands-on techniques for collaborating with and involving stakeholders in research planning, execution, analysis, and reporting)

Chapter 4 introduces ways for teaming up with stakeholders. It describes the different stages in which UX research practitioners collaborate with stakeholders for better buy-in for research results. Collaboration with stakeholders happens when planning studies, recruiting participants, interacting with study participants, and coanalyzing the data collected and when results are reported to others.

Chapter 5: The single biggest problem in communication is the illusion that it has taken place

(Strategies and tools to effectively communicate research results by using reports, presentations, and more cool stuff)

Chapter 5 discusses strategies and tactics for better communication of research results to stakeholders. The chapter goes deeply into writing reports and discusses other forms of communicating results such as presentations, videos, posters, and so on. The chapter ends with a discussion about soft communication skills, such as ways to bring bad news to your team.

Chapter 6: You can't manage what you don't measure

(Signals that indicate research is engaging stakeholders and how you can systematically track success or failure)

Chapter 6 identifies nine signs that research is making an impact on stakeholders, teams, and organizations and describes ways to determine whether it is being used well. It also suggests techniques to track and monitor the impact of research.

Case studies and interviews

The book is supplemented by 45 short case studies contributed by UX research practitioners from all over the world. These case studies demonstrate how these practitioners got buy-in for research they conducted, including helpful insights. In addition,

the book is accompanied by 30 videos that are available on the companion website (www.itsourresear.ch). Most of the videos are interviews with UX thought leaders and others who have interesting things to say about getting stakeholder buy-in for research. I interviewed in-house practitioners, consultants, people from the Lean Startup world and from academia, and even a negotiation expert and a complaint psychologist. When an interview is relevant to a certain idea, I included a reference to it. Case studies and videos come from all corners of the world, including Australia, Japan, Israel, Denmark, The Netherlands, Finland, Germany, Italy, Switzerland, the United Kingdom, Ireland, Canada, and the United States. The list of interviewees consists of UX industry greats such as Jared Spool, Kim Goodwin, Cennydd Bowles, Caroline Jarrett, Rolf Molich, Donna Spencer, Giles Colborne, Whitney Hess, and Jeff Sauro. I am confident you'll find these interviews insightful.

QR codes

References to book-related websites and to the videos are provided through QR (Quick Response) codes. A QR code is a two-dimensional barcode that includes information that can be read by some camera-equipped mobile devices. You can scan a code with your mobile device and be delivered straight to a specific web page.

To use a QR code, download and install a QR code reader on your smartphone or tablet computer. It will take you a minute to find an app, download, and install it. After launching the app, point your device's camera to the code and scan it. The code will take you straight to the web page you wanted. For example, this QR code points you to the home page of the companion site for this book.

The companion website

The companion website for the book has several goals:

1. Start a conversation about the topic of the book

2. Complete the book with video interviews

3.   Provide educational materials for students and lecturers

4.   Provide free materials from the book

5.   Provide information about the author's talks, workshops, and appearances

I'd like to start a conversation

Getting stakeholder buy-in for UX research is a moving target. Stakeholders come and go, situations change, you change. Many times, when I thought stakeholders really got it, there came a time when the same people showed that they really didn't. This sort of thing made me want to become a lifelong learner of this topic. And I'd love for you to join the ride. What is working well for you? What do you need help with?

I hope that this book starts a conversation among UX research practitioners. I have started the conversation before and continued it while I was writing this book. I invite you to join me and continue the dialog on the companion website (www. itsourresear.ch), Twitter (@itsourresearch), Google+, and Facebook (Search for the "It's Our Research" page).

You are also more than welcome to contact me directly at tomer@itsourresear.ch.