It's Our Research

Getting Stakeholder Buy-in for User Experience Research Projects
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TOMER SHARON

Foreword by Rolf Molich
To my life, Iris.
To my boys, Segev and Sella. I love you to the moon, sky, stars, sun, clouds, and back.
"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

Foreword by Rolf Molich xv
Prologue: The Usable Planet, by Gary Bunker xxxiv

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

1

IF LIFE GIVES YOU LIMES, MAKE MOJITOS!  3
Identifying stakeholders, selling user experience research, and dealing with difficult people and situations

Introduction  4
Types of stakeholders  5
  Business stakeholders  5
  Engineering stakeholders  8
  User experience stakeholders  10
  Users  11
The perspectives of UX research stakeholders  11
Difficult people, teams, and organizations: Fight or flight?  23
Selling the value of research  30
The Lean Startup movement  38
Accept the fact that it might not work and that it's okay 41

References 42
Takeaways 44

2 MMM . . . INTERESTING; SO WHAT EXACTLY IS IT THAT YOU WANT TO LEARN? 47
Implementing your great participant interviewing skills on stakeholders; asking good questions, listening, saying the right things, and identifying research opportunities

Introduction 48
Initiation of a study 48
The most important questions to ask your stakeholders 49
   What is the product? 51
   Who are the users of the product? 52
   What do you want to know? Why? 52
   When do you need the results? 53
   What will you do with the research results? 54
   Bonus question: What do you know now? 55
Delay any discussion about methodologies 57
Become the voice of reason 59
Listening and sowing seeds 60
Takeaways 64
3 IF YOU PICK A METHODOLOGY FIRST, SOMETHING MUST BE WRONG 67
 Strategies for planning studies with stakeholders and techniques for developing the right research questions

Introduction 68
Research plans 68
  Users and purposes of study plans 70
  Long plans 72
  No plans 73
  The plan stakeholders love: The one-page plan 75
Study goals 78
  Why have goals? Who needs goals? 78
  Nongoals 78
  The difference between goals and questions 79
Research questions 81
  Good and bad questions 82
The questions stakeholders ask and the ones they do not 85
How many questions? 86
Prioritizing questions 86
Selecting a methodology and describing it 87
The magic of injecting quantitative data into qualitative findings 92
References 97
Takeaways 98
WHAT’S GONNA WORK? TEAMWORK! 101
Handson techniques for collaborating and involving stakeholders in research planning, execution, analysis, and reporting

Introduction 102
Why collaborate? 103
Plan together 105
  The meetings you need to have 105
  A simple planning artifact 106
  Agreement and buy-in per study 107
Recruit participants together 108
  Who can help and when 108
  Why bother? I can do without them! 109
How to ask for help 109
Salespeople are very busy people 110
Interact with users together 111
Stakeholders in field studies 112
Stakeholders in lab studies 117
  Help stakeholders interview users and launch surveys 123
Analyze together 126
Color the experience 128
  The field visit debrief is a huge opportunity 130
  Use the KJ technique 130
  Conduct workshops 137
  Do not report recommendations 143
Report results together 144
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

Introduction 150

Reports 152

Avoid the report—which-is-actually-a-presentation 152
Share key findings before your report is ready 153

Report structures 155
Report only the most severe findings 159
The executive summary 160
How long should a report be? 161
Don’t start fires 162
Use the report as a live communication tool 163

Presentations 165
Learn the art of presenting 165
Present to multiple teams 177
Other communication tools and techniques 179

Videos 179
Visualize and design posters 181
Run a research expo 192
Combine quantitative and qualitative data 196
Develop top ten lists 199

Soft communication skills 200

ALWAYS communicate what works well 200
Become immersed in your team 201
Communicate bad news 202
Never use an escalation mandate 204
Proxy designers 204

References 205
Takeaways 207

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)

Introduction 210

Signs that research is being used well 210

Research is consumed 211
Budget is allocated for more research 213
Findings are long and lasting 213
Trust is established 214
Skeptical stakeholders become believers 215
Business is changed 216
Staffing is changed 217
Repeated requests are made for UX research training 217
Researchers are recognized 218
How to track the impact of research 218
Have a buy-in tracking strategy 218
Before and after screenshots 219
Screenshots with callouts 222
Spreadsheets 224
Quotes and videos 225
Research analytics 226
References 227
Takeaways 228
Epilogue 231
Index 235
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

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!
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.

Morgan Kaufmann’s Rachel Roumeliotis, Steve Elliot, and especially Dave Bevans are the professionals that make things happen. I highly appreciate what you do and thank you for it.

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

I wanted this book to mix the knowledge and experience of many people. I thank all those who took the time to write a case study. The experience you share is invaluable: Scott Smith, Gerry Gaffney, Moshe Ingel, Eva Kaniasty, Hiroshi Ushioda, Susumu Kuriyama, Reva Hamon, Gregg Almquist, Michael Summers, Richard Buttiglieri, Lior Yair, Vitaly Mijiritsky, Bill Albert, Silvia Zimmermann, Carol Smith, Kris Engdahl, Jen McGinn, Jakob Biesterfeldt, Meena Kothandaraman, Jeff Sauro, Shmuel Bollen, Yoram Pomer, Steve Portigal, Julie Norvaisas, Kirsten Robinson, Sauli Laitinen, Amir Dotan, Stephen Denning, Takashi Sasaki, Beverly Freeman, Chris Hass, Filip Healy, Roland Stahel, Bob Thomas, Michael Hawley, Michele Visciola, Aga Bojko, and Rolf Molich.
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The most exciting part of authoring this book was the video interviews and contributions. I learned so much from all of you and know that now anyone can enjoy your wisdom. Thank you to Jay Trimble, Paul Adams, Aza Raskin, Donna Tedesco, Jeff Sauro, Jared Spool, Leah Buley, Cennydd Bowles, Dana Chisnell, Donna Spencer, Takashi Sasaki, Caroline Jarrett, Ido Mor, Kim Goodwin, Rolf Molich, Giles Colborne, Meena Kothandaraman, Whitney Hess, Eric Ries, Janice Fraser, Johanna Kollmann, William Gribbons, Ben Shneiderman, Chris St. Hilaire, Gerry McGovern, Bertice Berry, Filip Healy, Felipe Caro, Ruben van Loosbroek, Maartje van Hardeveld, and Guy Winch.

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A special thanks to Kristen Davis who designed a beautiful book and to Aviel Lazar for the QR codes idea.

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

<table>
<thead>
<tr>
<th>Number</th>
<th>Figure</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.1</td>
<td>The biggest challenges for UX people.</td>
<td>xlix</td>
</tr>
<tr>
<td>0.2</td>
<td>As seen by.</td>
<td>1</td>
</tr>
<tr>
<td>1.1</td>
<td>Stakeholder circles.</td>
<td>6</td>
</tr>
<tr>
<td>1.2</td>
<td>UX research maturity model.</td>
<td>25</td>
</tr>
<tr>
<td>1.3</td>
<td>Organizational charts: how does UX research fit into these cultures?</td>
<td>26</td>
</tr>
<tr>
<td>4.1</td>
<td>When is the best time to collaborate?</td>
<td>103</td>
</tr>
<tr>
<td>4.2</td>
<td>Quarterly UX research planning artifact.</td>
<td>107</td>
</tr>
<tr>
<td>4.3</td>
<td>Stakeholders observe a remote usability test by Bolt</td>
<td>Peters.</td>
</tr>
<tr>
<td>4.4</td>
<td>UX practitioners and their stakeholders during a workshop held at a Google office in Brazil.</td>
<td>140</td>
</tr>
<tr>
<td>5.1</td>
<td>Sample report sections.</td>
<td>158</td>
</tr>
<tr>
<td>5.2</td>
<td>Suggested page count for short and long reports.</td>
<td>162</td>
</tr>
<tr>
<td>5.3</td>
<td>Books prepared by Infield Design, Japan.</td>
<td>169</td>
</tr>
<tr>
<td>5.4</td>
<td>Slides from the Quest for Ice Cream presentation.</td>
<td>172</td>
</tr>
<tr>
<td>5.5</td>
<td>Visual stimulus.</td>
<td>181</td>
</tr>
<tr>
<td>5.6</td>
<td>Visual meeting minutes.</td>
<td>181</td>
</tr>
<tr>
<td>5.7</td>
<td>Visual concept.</td>
<td>181</td>
</tr>
<tr>
<td>5.8</td>
<td>Visual stimulus.</td>
<td>182</td>
</tr>
<tr>
<td>5.9</td>
<td>Visualizer.</td>
<td>182</td>
</tr>
<tr>
<td>5.10</td>
<td>User journey.</td>
<td>182</td>
</tr>
<tr>
<td>5.11</td>
<td>A UX map by Amberlight Partners.</td>
<td>183</td>
</tr>
<tr>
<td>5.12</td>
<td>Survey results for design A (home page 1).</td>
<td>185</td>
</tr>
<tr>
<td>5.13</td>
<td>Survey results for design B (home page 2).</td>
<td>186</td>
</tr>
<tr>
<td>5.14</td>
<td>Survey results for design C (home page 3).</td>
<td>186</td>
</tr>
</tbody>
</table>
LIST OF FIGURES AND TABLES

<table>
<thead>
<tr>
<th>Number</th>
<th>Figure</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.15</td>
<td>A sample page from a product concept brochure project.</td>
<td>188</td>
</tr>
<tr>
<td>5.16</td>
<td>Labeled polar display.</td>
<td>189</td>
</tr>
<tr>
<td>5.17</td>
<td>Polar displays of personas.</td>
<td>189</td>
</tr>
<tr>
<td>5.18</td>
<td>Top ten field study themes poster.</td>
<td>190</td>
</tr>
<tr>
<td>5.19</td>
<td>The expo room. Projected presentation, posters, video stations (laptops), and artifacts (arranged on table).</td>
<td>193</td>
</tr>
<tr>
<td>5.20</td>
<td>Stakeholders interact with expo materials.</td>
<td>194</td>
</tr>
<tr>
<td>5.21</td>
<td>The lostness formula (Tullis &amp; Albert 2008).</td>
<td>196</td>
</tr>
<tr>
<td>5.22</td>
<td>Data to support qualitative findings.</td>
<td>197</td>
</tr>
<tr>
<td>5.23</td>
<td>Walk the walk.</td>
<td>200</td>
</tr>
<tr>
<td>6.1</td>
<td>Usabilitynet.org: a &quot;before&quot; screenshot.</td>
<td>218</td>
</tr>
<tr>
<td>6.2</td>
<td>Usabilitynet.org: an &quot;after&quot; screenshot.</td>
<td>218</td>
</tr>
<tr>
<td>6.3</td>
<td>Usabilitybok.org: a possible &quot;after&quot; screenshot.</td>
<td>219</td>
</tr>
<tr>
<td>6.4</td>
<td>Using callouts with a picture of a physical product.</td>
<td>220</td>
</tr>
<tr>
<td>6.5</td>
<td>Using callouts with a digital product.</td>
<td>221</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number</th>
<th>Table</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>Documenting stakeholder knowledge in a table prior to a research project.</td>
<td>56</td>
</tr>
<tr>
<td>3.1</td>
<td>A sample one-page research plan.</td>
<td>77</td>
</tr>
<tr>
<td>3.2</td>
<td>The main differences between goals and research questions.</td>
<td>79</td>
</tr>
<tr>
<td>4.1</td>
<td>A rainbow of issues with captcha (a challenge-response test used to ensure that a response is generated by a human rather than a computer).</td>
<td>122</td>
</tr>
<tr>
<td>6.1</td>
<td>Sample research follow-up spreadsheet.</td>
<td>225</td>
</tr>
</tbody>
</table>
## CASE STUDIES

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Author</th>
<th>Title</th>
<th>Country</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Scott Smith</td>
<td>Use one word to describe the biggest challenge in UX</td>
<td>Canada</td>
<td>xlvii</td>
</tr>
<tr>
<td>1</td>
<td>Gerry Gaffney</td>
<td>Negotiating constraints</td>
<td>Australia</td>
<td>13</td>
</tr>
<tr>
<td>1</td>
<td>Moshe Ingel</td>
<td>What about the answers?</td>
<td>Israel</td>
<td>14</td>
</tr>
<tr>
<td>1</td>
<td>Eva Kaniasty</td>
<td>Choosing the right design</td>
<td>United States</td>
<td>15</td>
</tr>
<tr>
<td>1</td>
<td>Hiroshi Ushioda, Susumu Kuriyama, Reva Hamon,</td>
<td>Persuading large companies that five is enough</td>
<td>Japan</td>
<td>18</td>
</tr>
<tr>
<td>1</td>
<td>Gregg Almquist</td>
<td>Managing focus, scope, and participation</td>
<td>United States</td>
<td>20</td>
</tr>
<tr>
<td>1</td>
<td>Michael Summers</td>
<td>In search of the usable creative director</td>
<td>United States</td>
<td>21</td>
</tr>
<tr>
<td>1</td>
<td>Richard Buttiglier</td>
<td>More research as a persuasion technique</td>
<td>United States</td>
<td>27</td>
</tr>
<tr>
<td>1</td>
<td>Gregg Almquist</td>
<td>Focus on projects that produce tangible results</td>
<td>United States</td>
<td>28</td>
</tr>
<tr>
<td>1</td>
<td>Lior Yair, Vitaly Mijiritsky</td>
<td>Show, don’t tell</td>
<td>Israel</td>
<td>29</td>
</tr>
<tr>
<td>1</td>
<td>Bill Albert</td>
<td>Usability is subtraction through addition</td>
<td>United States</td>
<td>31</td>
</tr>
<tr>
<td>1</td>
<td>Silvia C. Zimmermann</td>
<td>The art of selling experience design and design thinking approaches</td>
<td>Switzerland</td>
<td>34</td>
</tr>
<tr>
<td>1</td>
<td>Carol Smith</td>
<td>Words matter</td>
<td>United States</td>
<td>36</td>
</tr>
<tr>
<td>3</td>
<td>Kris Engdahl</td>
<td>Setting testing goals with a team or client</td>
<td>United States</td>
<td>79</td>
</tr>
<tr>
<td>3</td>
<td>Jen McGinn</td>
<td>Asking the right questions</td>
<td>United States</td>
<td>84</td>
</tr>
<tr>
<td>3</td>
<td>Jakob Biesterfeldt</td>
<td>One request, three methodologies</td>
<td>Germany</td>
<td>87</td>
</tr>
<tr>
<td>3</td>
<td>Meena Kothandaraman</td>
<td>Negotiating a methodology for a milk study in India</td>
<td>United States</td>
<td>89</td>
</tr>
<tr>
<td>3</td>
<td>Jeff Sauro</td>
<td>How three users helped solve a problem that 3,000 could not</td>
<td>United States</td>
<td>94</td>
</tr>
<tr>
<td>Chapter</td>
<td>Author</td>
<td>Title</td>
<td>Country</td>
<td>Page</td>
</tr>
<tr>
<td>---------</td>
<td>--------</td>
<td>----------------------------------------------------------------------</td>
<td>---------</td>
<td>------</td>
</tr>
<tr>
<td>3</td>
<td>Bill Albert</td>
<td>A conversation about numbers</td>
<td>United States</td>
<td>95</td>
</tr>
<tr>
<td>3</td>
<td>Shmuel Bollen</td>
<td>The cost of finding documents</td>
<td>United States</td>
<td>96</td>
</tr>
<tr>
<td>4</td>
<td>Yoram Pomer</td>
<td>Dealing with defensive salespeople</td>
<td>Israel</td>
<td>114</td>
</tr>
<tr>
<td>4</td>
<td>Steve Portigal, Julie Norvaisas</td>
<td>Stakeholders in the field</td>
<td>United States</td>
<td>115</td>
</tr>
<tr>
<td>4</td>
<td>Gregg Almquist</td>
<td>The power of observing real customers</td>
<td>United States</td>
<td>118</td>
</tr>
<tr>
<td>4</td>
<td>Kirsten Robinson</td>
<td>The interactive issues matrix: recording and organizing stakeholder observations</td>
<td>United States</td>
<td>122</td>
</tr>
<tr>
<td>4</td>
<td>Sauli Laitinen</td>
<td>Analyzing results together</td>
<td>Finland</td>
<td>127</td>
</tr>
<tr>
<td>4</td>
<td>Amir Dotan</td>
<td>Using personas in a workshop to get stakeholder buy-in</td>
<td>United Kingdom</td>
<td>139</td>
</tr>
<tr>
<td>4</td>
<td>Jakob Biesterfeldt</td>
<td>The power of workshops</td>
<td>Germany</td>
<td>141</td>
</tr>
<tr>
<td>4</td>
<td>Stephen Denning</td>
<td>Business, meet users . . .</td>
<td>Scotland</td>
<td>142</td>
</tr>
<tr>
<td>5</td>
<td>Takashi Sasaki</td>
<td>Why a book matters</td>
<td>Japan</td>
<td>168</td>
</tr>
<tr>
<td>5</td>
<td>Beverly Freeman</td>
<td>The ice cream presentation</td>
<td>United States</td>
<td>172</td>
</tr>
<tr>
<td>5</td>
<td>Tomer Sharon</td>
<td>Present to your biggest critic</td>
<td>United States</td>
<td>174</td>
</tr>
<tr>
<td>5</td>
<td>Chris Hass</td>
<td>The most powerful two to ten minutes of your research findings presentation</td>
<td>United States</td>
<td>178</td>
</tr>
<tr>
<td>5</td>
<td>Filip Healy, Roland Stahel</td>
<td>Visual thinking and communication</td>
<td>United Kingdom</td>
<td>180</td>
</tr>
<tr>
<td>5</td>
<td>Filip Healy, Roland Stahel</td>
<td>User experience mapping</td>
<td>United Kingdom</td>
<td>183</td>
</tr>
<tr>
<td>5</td>
<td>Bob Thomas</td>
<td>Visual survey results</td>
<td>United States</td>
<td>184</td>
</tr>
<tr>
<td>5</td>
<td>Sauli Laitinen</td>
<td>Product concept brochure</td>
<td>Finland</td>
<td>187</td>
</tr>
<tr>
<td>5</td>
<td>Michael Hawley</td>
<td>Visualizing key differences in findings</td>
<td>United States</td>
<td>188</td>
</tr>
<tr>
<td>5</td>
<td>Tomer Sharon</td>
<td>The top ten themes poster</td>
<td>United States</td>
<td>190</td>
</tr>
<tr>
<td>5</td>
<td>Tomer Sharon</td>
<td>Lostness</td>
<td>United States</td>
<td>195</td>
</tr>
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<td>Chapter</td>
<td>Author</td>
<td>Title</td>
<td>Country</td>
<td>Page</td>
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<tr>
<td>5</td>
<td>Beverly Freeman</td>
<td>Taking advantage of the theory of psychology and human factors</td>
<td>United States</td>
<td>202</td>
</tr>
<tr>
<td>6</td>
<td>Michele Visciola</td>
<td>Better buying experience for blackberry phones</td>
<td>Italy</td>
<td>210</td>
</tr>
<tr>
<td>6</td>
<td>Tomer Sharon</td>
<td>What happened when I invited executives to use the product?</td>
<td>United States</td>
<td>213</td>
</tr>
<tr>
<td>6</td>
<td>Agnieszka (Aga) Bojko</td>
<td>Why?</td>
<td>United States</td>
<td>221</td>
</tr>
<tr>
<td>Epilogue</td>
<td>Rolf Molich</td>
<td>Quality and usability</td>
<td>Denmark</td>
<td>232</td>
</tr>
<tr>
<td>QR Code Number</td>
<td>Interviewee</td>
<td>Country</td>
<td></td>
<td></td>
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<tr>
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<td>-----------------</td>
<td></td>
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</tr>
<tr>
<td>111</td>
<td>Jay Trimble</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>112</td>
<td>Paul Adams</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>113</td>
<td>Aza Raskin</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>114</td>
<td>Donna Tedesco</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>115</td>
<td>Jeff Sauro</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>116</td>
<td>Jared Spool</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>117</td>
<td>Leah Buley</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>118</td>
<td>Cennydd Bowles</td>
<td>United Kingdom</td>
<td></td>
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<tr>
<td>119</td>
<td>Dana Chisnell</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>120</td>
<td>Donna Spencer</td>
<td>Australia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>121</td>
<td>Takashi Sasaki</td>
<td>Japan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>122</td>
<td>Caroline Jarrett</td>
<td>United Kingdom</td>
<td></td>
<td></td>
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<tr>
<td>123</td>
<td>Ido Mor</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>124</td>
<td>Kim Goodwin</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>125</td>
<td>Rolf Molich</td>
<td>Denmark</td>
<td></td>
<td></td>
</tr>
<tr>
<td>126</td>
<td>Giles Colborne</td>
<td>United Kingdom</td>
<td></td>
<td></td>
</tr>
<tr>
<td>127</td>
<td>Meena Kothandaramanan</td>
<td>United States</td>
<td></td>
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</tr>
<tr>
<td>128</td>
<td>Whitney Hess</td>
<td>United States</td>
<td></td>
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</tr>
<tr>
<td>129</td>
<td>Eric Ries</td>
<td>United States</td>
<td></td>
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</tr>
<tr>
<td>130</td>
<td>Janice Fraser</td>
<td>United States</td>
<td></td>
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</tr>
<tr>
<td>131</td>
<td>Johanna Kollmann</td>
<td>United Kingdom</td>
<td></td>
<td></td>
</tr>
<tr>
<td>132</td>
<td>William Gribbons</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>133</td>
<td>Ben Shneiderman</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>134</td>
<td>Chris St. Hilaire</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>135</td>
<td>Gerry McGovern</td>
<td>Ireland</td>
<td></td>
<td></td>
</tr>
<tr>
<td>136</td>
<td>Bertice Berry</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>137</td>
<td>Amberlight Partners</td>
<td>United Kingdom</td>
<td></td>
<td></td>
</tr>
<tr>
<td>138</td>
<td>Rabobank Group</td>
<td>Netherlands</td>
<td></td>
<td></td>
</tr>
<tr>
<td>139</td>
<td>Guy Winch</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## ONLINE PRESENCE

<table>
<thead>
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<th>Description</th>
<th>Link</th>
</tr>
</thead>
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PROLOGUE
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 interacts 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 something 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! Hoooollyyyyy craaaaaaaaaa- ***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*** ***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*** ***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?

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
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.itsourresearch.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.itsourresearch.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@itsourresearch.ch.