

Participant Led Usability Research



The Next Step In How We Work With Users

Greetings, #LTC2016.



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“You can make more friends in two months by becoming interested in other people than you can in two years by trying to get other people interested in you.”

– Dale Carnegie

(surprise! it's not all about you.)

**So what do you know
about Usability?**

Usability in a Nutshell

“Extent to which a product can be used by specified users to achieve specified goals with effectiveness, efficiency and satisfaction in a specified context of use.” – [ISO 9241-11](#)





Sample Video: Traditional Method

Discussion of Method

Specific mechanical tasks, like not dying, and possibly buying stuff.

- Scenario is provided, and may not match user's needs or experience or mindset
 - Tasks are predetermined, and may not reflect the user's mental model or approach to problem-solving
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The Mechanics of Traditional Usability

1. When we set up a usability script, who defines the task?
2. Do we expect all users to have the same needs, and mental models?
3. So why do we set up a rat's maze for them, and judge success based on how their needs and behavior fit our pattern?

Find ways to listen to users, not force their paths. *Their* methods are our teachers.

**What does it mean
to be participant led?**

The Participant-Led Approach to Usability

- Discover *user* scenario and task(s) relative to problem space
- Test that scenario in the environment as a task or tasks
- Pre-scripted steps are set aside until we've captured and tested all the user's tasks
- The task is created as part of the exercise, and we learn if it matches our intentions
- Less like watching a rat run the maze, and more like ethnography



https://commons.wikimedia.org/wiki/File:IDS_Center_Crystal_Court_1.jpg



Sample Video: Participant-Led Method

Discussion of Method

A sensing approach that assesses users in their natural environment

- Scenario is genuine to the user and may represent confirmation or contradiction of presumed or previously captured use cases
 - Tasks reflect the user's own approaches and may reveal opportunities to provide better support and relevance to the user
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**How this differs from
present methods**

A Solution Born of Experimentation

usability scenarios draft

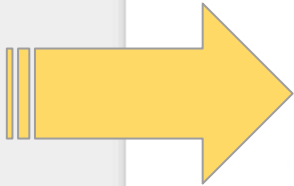


rose

File View Insert Format Tools Table Add-ons Help Last edit was made on December 12, 2014 by Amanda Costello

Comments

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and text-to-HTML. A ruler below the toolbar shows line numbers 1 through 7.



Scenario Zero (Before turning on computer)

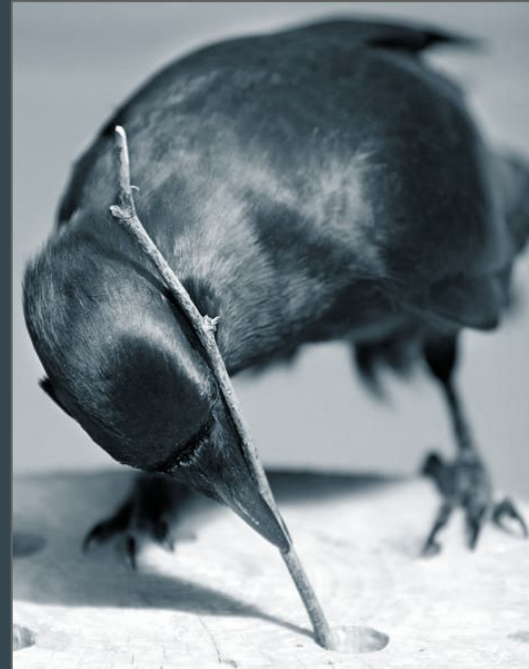
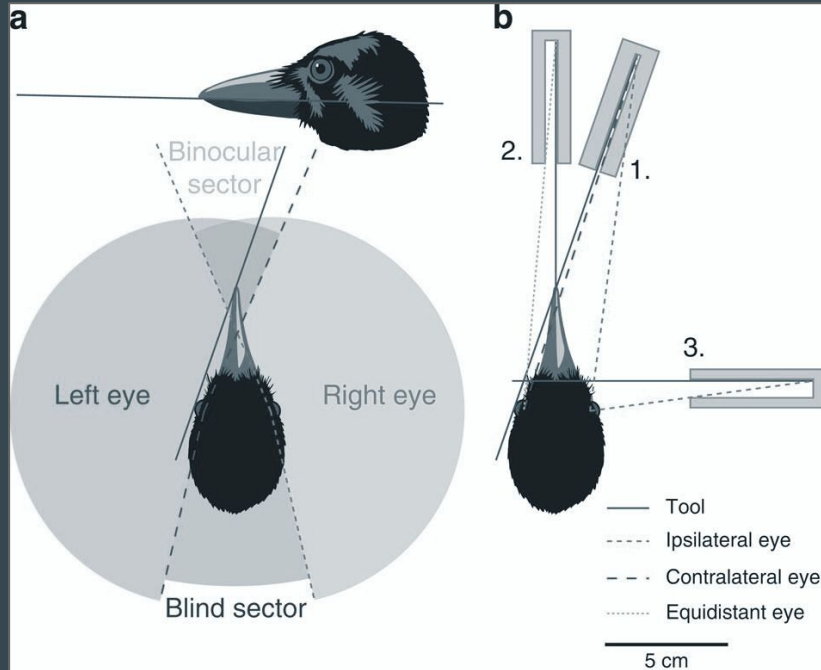
Take a moment to describe, out-loud, what you look for to decide whether any college is a good fit.

Scenario One

Your high school guidance counselor says that when you apply for college, you need to pick a major.

Task 1: Review this website and share your first impressions.

Validate Your Task AND Functional Hypotheses



Inform Improvements and Pivots, not Just Bug Fixes

WE CAN'T
CONTROL
THE WIND,
BUT WE CAN
DIRECT THE
SAILS...



Why this methodology is needed

Expectation, Scarcity, Bias, and Artificiality

These are the challenges that traditional usability is facing in the marketplace of ideas.

Expectation

When we engage in usability the expectation is that we're searching for and trying to solve only the mechanical problems we've discussed, limiting the overall value

Resource Scarcity

Finite resources, like time and budget, can cause project or product owners to rely on seemingly cheaper sources of information like experts, stakeholders, and insiders

Confirmation Bias

It's alarmingly easy to introduce bias into the activities we design.

If you've witnessed poorly designed and conducted tests, you may have good reason to doubt.

Artificiality

The contrived nature of traditional usability tests causes some professionals to see it as equivalent in value to expert-level troubleshooting review.

**What you need
to get started**

Prepare a Flexible Session and Capture Method

- There is no *additional* work in set-up.
- Effective capture requires adaptability.
- Any additional work you'll do is based on approach not volume.
- So it costs you nothing (additional).

Preparing flexible capture not only allows you to listen better, it focuses your learning and your recommendations.

You're Not Excused From the Basics

- You still need to know what your goals are, and what the hypotheses you're testing.
- You still need to screen for participants who would use your system.
- You need to know what questions you're trying to answer, and for whom.
- You still need a script. You just tuck it into your back pocket when they start.

Synthesis by User Criteria, Instead of System Criteria

- Make sense of your feedback based on the tasks participants define, not screens they visit.
- Let them be the judge of success or failure. Weigh their perception of success against the system's definition.
- Report back what you've learned in terms of user success, system success and model-match.

Embracing the Nature of the Method

- What is the point of usability, and user testing?
- What do you want to learn when you conduct it?
- How do you want to use what you've learned when you've learned it?

Freedom of Movement Needs a Landscape to Move In

- The robustness of your prototype or test environment is important. Or is it?
- To observe user choices in action, they need to be able to act on their choices.
- Remember, you're trying to remove artificiality - so brute-force intervention or moderator direction should be avoided and may be impossible.

Analyze Your Results Based on Tasks and Goals

- When it comes time to figure out what it all means, your results are not going to be easily converted into numbers.
- Synthesis will be far closer, in practice, to analyzing user research than judging success or failure task by task alone.
- You still know where users succeed and fail, but you add the lenses of participant-defined success and failure, and participant-defined task-relevance.

**So... Why were we
doing this again?
(Conclusion)**

A New Tool, Not a Replacement For All Tools

Amazingly enough, there will be times when this won't be the right thing to do.

- Participant Led exercises are excellent for informationally dense experiences
 - Times when users engage variable mindsets, intentions, and emotional states
- They're less appropriate to evaluate fixed systems and detailed interaction design
 - If users are going to have to use a fixed part of the system, like a stepped check-out process.

When to be Led by Your Participants

When traditional methods will do fine:

- “Get a library card.”
- “Check out.”
- “Add a patron.”



http://www.gameplayer.it/recensione/the_s

When participant-led methods do better:

- “Learn a new hobby.”
- “Research a disease or ailment.”
- “Decide whether to change your major.”



https://commons.wikimedia.org/wiki/File:IDS_Center_Crystal_Court_1.jpg

The Limits of this Method are Wholly Self-Defined

- There is not a particular market, industry, or subject matter for this method.
- This method can be used for discovery or in evaluation.
- You can run this method in-person or remotely.

Let Your Participants Open All Doors

- Throw away the conceit that your presumed uses and methods accurately mirror those of your user audience
- Learn more about the context users bring to content, tools, and interfaces not just what's pleasing and frustrating
- Allow user stories to be authentic, based on evidence, and defined by the needs, interests and requirements of users

Trust Your Users to Bring Their Truth to Your Work

- You have your script, but you want to discover theirs. You're still have it and are ready if they go blank.
- If you hit a wall, if you exhaust the participant's tasks, then you can engage your written script to get feedback on undiscovered parts of the system, and tasks they've not engaged.
- You can still cover all of your bases, but you also learn whether your bases were the same as their bases, and why.

**Questions, criticism,
and personal invective**

Thank you for your time and attention

**Here be dragons.
...Or at least some slides we didn't need.**

The Right Context For Being Participant Led

The Gap Explored

While many of us come to User Experience via Usability, it's important to know its nature and its limits when compared to the broader picture, remit, and responsibility of UX professionals.

User Experience:

Does this relate to real life?
When and why do people use it?
How does someone feel using it?
What do they say afterward?

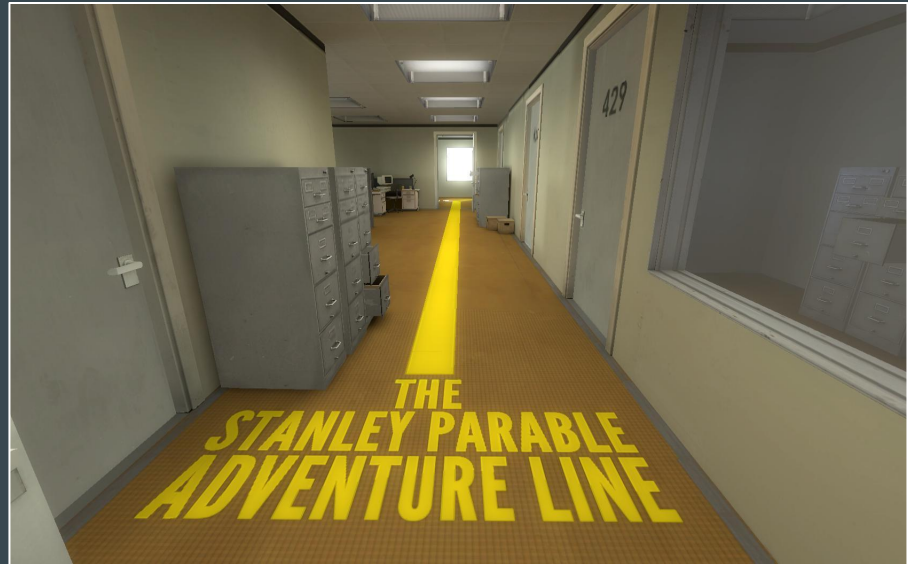
Usability:

Is it *possible* to learn and remember how to use it?
Is it *possible* to understand without help?
What's confusing, frustrating, and inefficient about it?

**We can learn that
the whole system is skewed,
even if the screens work.**

The Traditional Approach to Usability

- Discover user scenario and task(s) relative to problem space
- Test that scenario in the environment as a task or tasks
- Straying from the path is a source of problems (staying on track)
- “Today, we’re going through that door. Tomorrow, we tackle door #429.”



http://www.gameplayer.it/recensione/the_stanley_parable