

# So You Want to Do User Testing: Operationalizing a Plan

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# Pre-work: What do you want to redesign?

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"**Are** patrons using OneSearch?"

No.

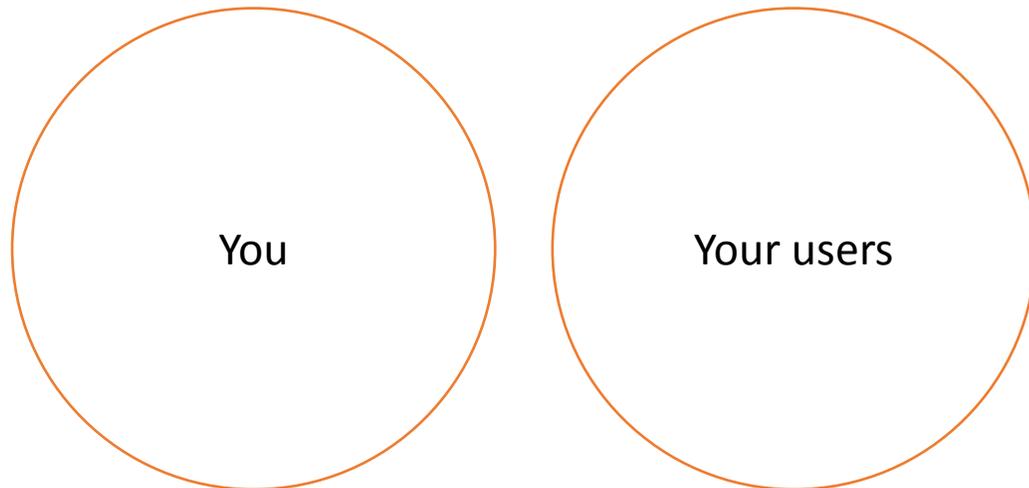
"**How** do patrons find material for their research?"

Well, let me tell you...

# Planning: Frame your research

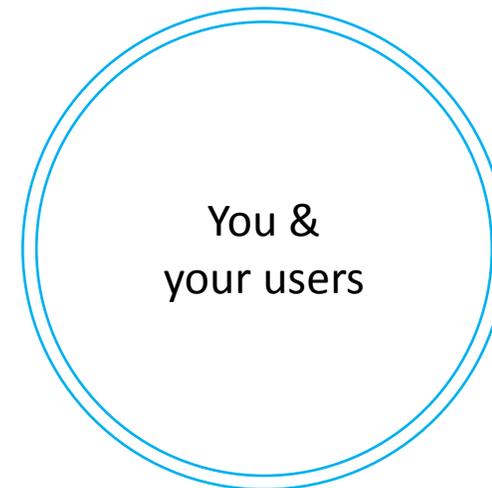
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## Institutional-centered perspective



- Research based on current space and resources
- People will ask for what they need
- One-size fits-all
- Design and assessment separate

## User-centered perspective



- Research based on user-need
- Proactive to uncover user need
- Personalized, responsive
- Design and assessment linked

# Planning: Write a scope statement

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# Planning: Identify stakeholders

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## **Stakeholder** (*noun*)

/ stāk hōldər/

a person or group who holds a stake, or has a vested interest, in a particular project.

In the library, a stakeholder can be a person or group of influence, such as a:

- University Librarian or Dean
- committee
- department
- board

# Planning: Assemble a team

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Start with a core group of **people interested in the project**. Keep in mind you can add to the team after you've determined your research methods.

Consider including a **user representative** and a **stakeholder**, for their unique perspective.

# Planning: Chose your research method

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## **Independent and observational; no user involvement**

- Personas
- Ecology Map
- Space Analysis
- Service Safari

## **Interactive between researcher and user**

- User Testing
- User Journey Mapping
- Focus Groups
- Diary Studies

## **User provides feedback; little interaction between researcher and user**

- Surveys
- Heat Mapping

# Research Method: Personas

Can be done solo, without user participation.

Good for:

- Preliminary testing of how decisions will affect users.
- Low effort, time, and costs.

Considerations:

- Users are imagined but based on actual types of users.
- Limit personas to a manageable number, but be sure to represent many different types of users.

# Persona Examples



**Name:** Michelle   **Age:** 19  
**Location / Affiliation:** Yale College  
**Title:** Sophomore

**What types of activities do they do online:** Social media, movies/music.

**What do they use for research:** Google Scholar, Canvas for online assignments

**What types of activities compete for their time:** Coursework & study, clubs, women's water polo

**What activity would they perform on site at the library:**

- Request help from a librarian
- Look for an overview of a topic in a textbook
- Find a DVD (not available on Netflix)
- Find 10 or 20 scholarly references for a paper



**Name:** David   **Age:** 42  
**Location / Affiliation:** Yale College  
**Title:** Tenured professor

**What types of activities do they do online:** Research, correspond with students and colleagues via email

**What do they use for research:** Specialized databases, RSS feeds for individual journals

**What types of activities compete for their time:** Research, recommendations for students, meetings

**What activity would they perform on site at the library:**

- Suggest books for acquisition
- Set-up with course reserves
- Assistance with remote access to resources
- Bookmark links to specific journals

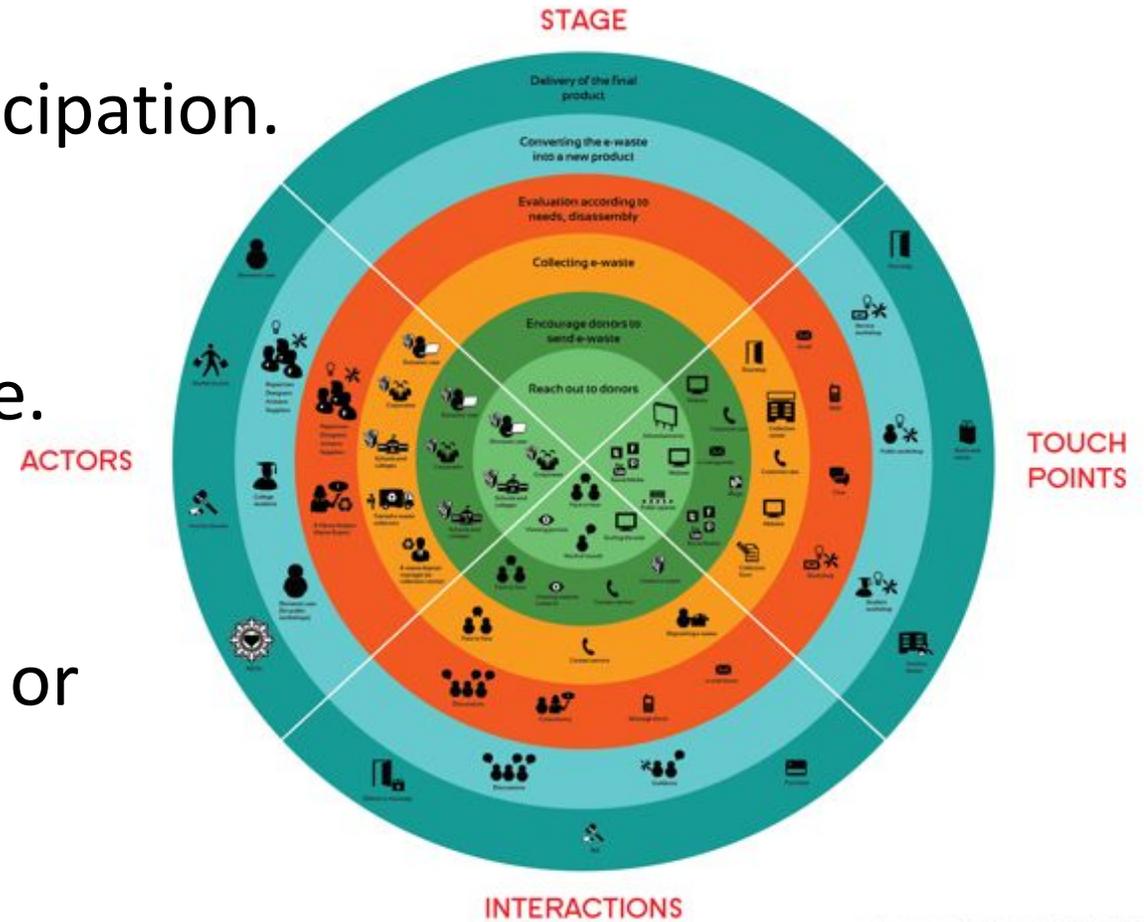
# Research Method: Ecology Map

Can be done solo, without user participation.

Helps to determine how different players react to or influence a service.

Good for:

- Evaluation at the beginning or end of a project
- Identifying number of user interactions



# Research Method: User Testing

Interactive between the researcher and the patron.

Good for:

- Demonstrating what works well and what doesn't.
- Gathering insight into user behavior.

Considerations:

- Need standard questions to ask each participant.
- May require more than one researcher.
- Users need to provide feedback.

# User Testing Examples

“Imagine you are doing research on the evolution of dinosaurs. Show me how you might identify resources on that topic.”

“Now, if you want to limit your search to just journals, how would you do that?”

“Do you see a way to get to a resource from here?”

# Research Method: Journey Mapping

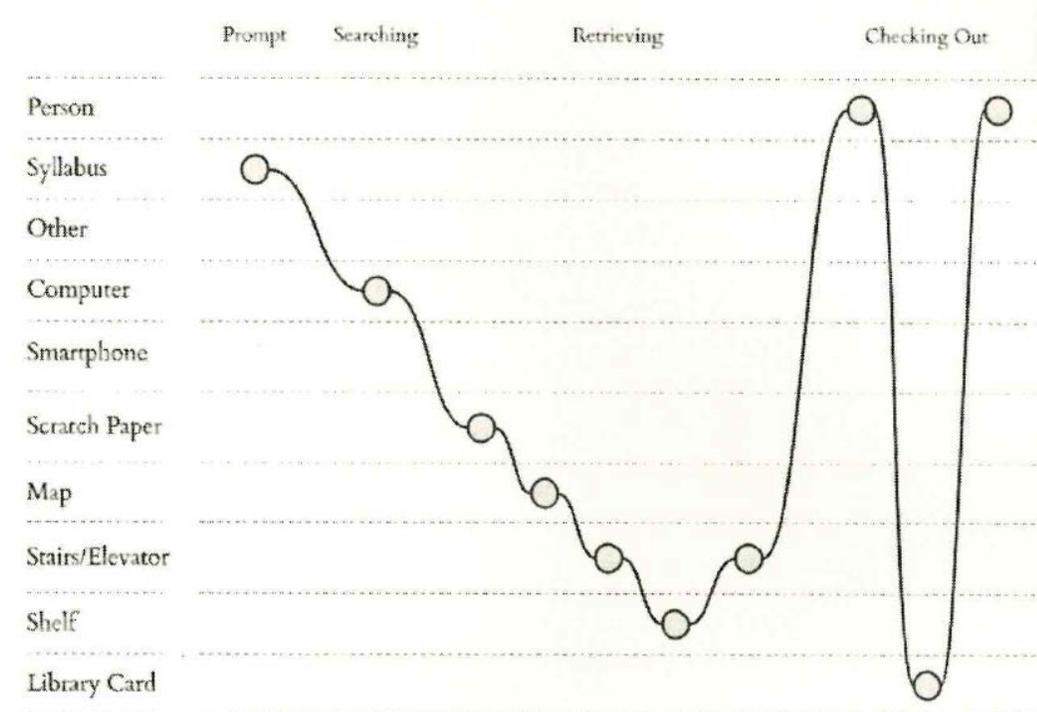
Interactive between the researcher and the patron.

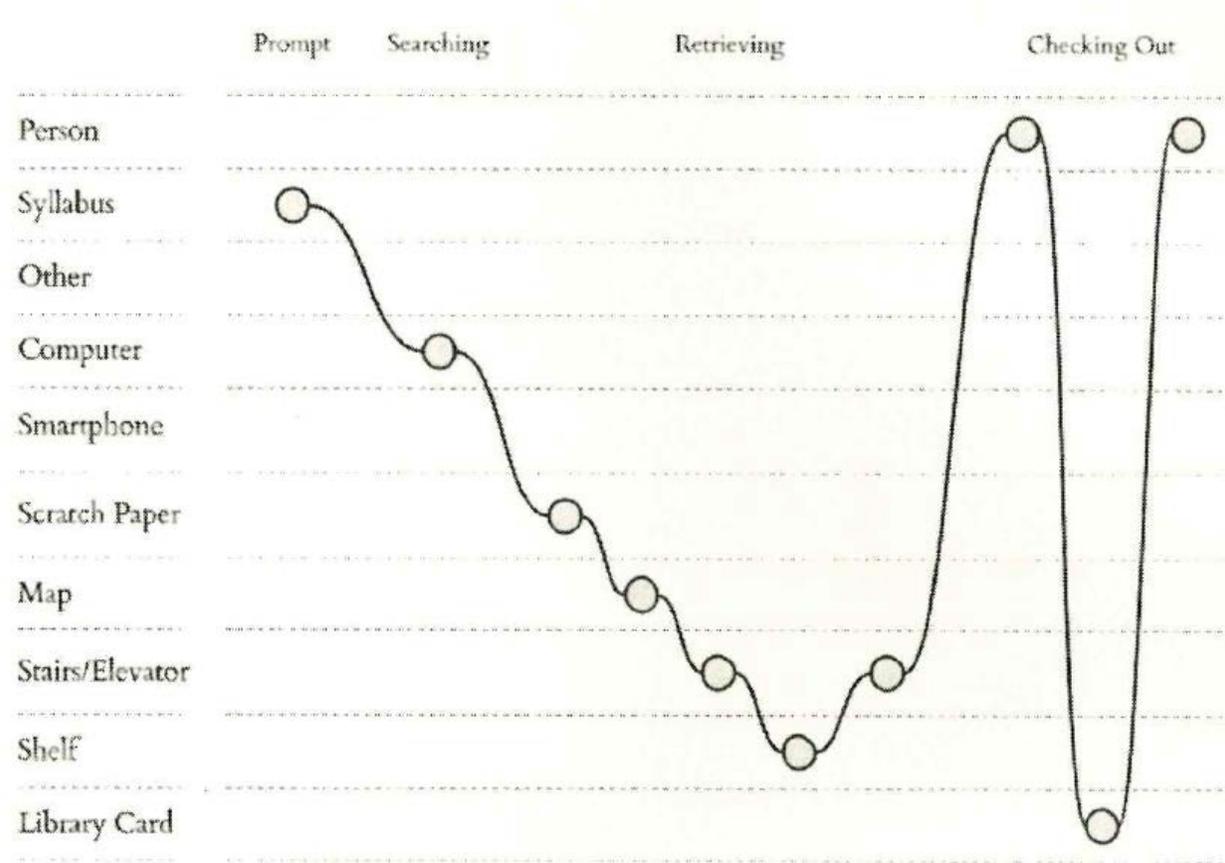
Good for:

- Understanding actual user behavior
- Visualizing behavior

Considerations:

- Requires engaged participants
- Could be done with “personas”





# Research method: Surveys

User provides feedback, no interaction (or little interaction).

Good for:

- Determining user satisfaction and demographics.
- Gathering input from many people.
- Assessing user needs over time.

Considerations:

- Survey design can be challenging.
- Survey should be tested in advance.
- Response rates can be low.

# Quick recap...

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- Frame your research question
- Identify stakeholders
- Assemble a team
- Choose research method



# Project Timeline, example 2

Activity/ Month Of	January 05	February 05	March 05	April 05	May 05	June 05	July 05	August 05	September 05	October 05	November 05	December 05	January 06	February 06	March 06	April 06
Conduct Initial Mailing																
Design Internal Web Site																
Conduct Follow Up Calls																
Redesign External Web Site																
Prepare Orientation/ Training Materials																
Conduct Orientation Training								(if needed)	(if needed)	(if needed)	(if needed)	(if needed)	(if needed)	(if needed)	(if needed)	
Conduct On-going Outreach	Phone Calls and Emails															
Conduct PubMed Training								(if needed)	(if needed)	(if needed)	(if needed)	(if needed)	(if needed)	(if needed)	(if needed)	
Conduct and Analyze Focus Groups																
Conduct and Analyze Customer Satisfaction Surveys									LibPub				Qualidigm CSS			
Attend Industry Conferences					AHQA				QualityNet					Tri-Regional		
Prepare and Submit NN/LM Reports	Quarterly and Final Reports as scheduled at time of award															

# Pick a sample user population

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Sample user populations are entirely variable!

Considerations:

- Is the service you're redesigning specific to a user population?
- Your research method may determine your sample population, too.
- What groups do you have access to? How much can you control participation?

# Gather your technology

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You'll need:

- Tools based on your chosen research method
- Analysis software
- white boards, office space

Considerations:

- What is the cost?
- What resources are already available at your institution?
- What skills are available on your research team?
- Will any technology require training?

# Choose a project platform

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Commonly used:

- SharePoint
- Google Drive
- Box
- Course Management Systems (Canvas, Blackboard)

Considerations:

- How many collaborators will need access to material?
- Is anonymity an issue?
- Does the platform offer back-up in case of data loss?

# Calculate your funding

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Funding = money, but it also encompasses:

- Staff time
- Technology
- Giveaways

Is the funding pre-determined, such as from a grant, institutional administration? If so, make sure you are within budget.

*At times, a review of funding may require that you revisit chosen methods and technology – better now, than later!*

# Quick re-cap...

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- Create a timeline
- Pick a sample user population (be specific, targeted)
- Choose a project platform (for collaborators, surveys, etc.)
- Gather your technology
- Calculate your funding (technology, giveaways, etc.)

# Analyze

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Quantitative methods:

- Excel
- SPSS
- SAS

Qualitative methods:

- Hand coding
- Nvivo
- ATLAS.ti



# Report

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- Tie results into stakeholders' goals and needs
- Include quotes and figures from study participants if available
- Include actionable items
- Can become a publishable article



# Assess

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- What did you learn? Was the outcome what you expected?
- Can you make the necessary changes to the service?
- Will another round of testing be required?
- Determine how to assess whether service change improved users' experience.

# Share

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Sharing is distinct from the report phase. Sharing involves reaching out to the larger community so that others can build on your work, replicate your research, and learn from what you did!

- Conference Presentation
- Conference Poster
- Article
- Institutional Repository



# Quick re-cap...

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Analyze

Report

Assess

Share

# References

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