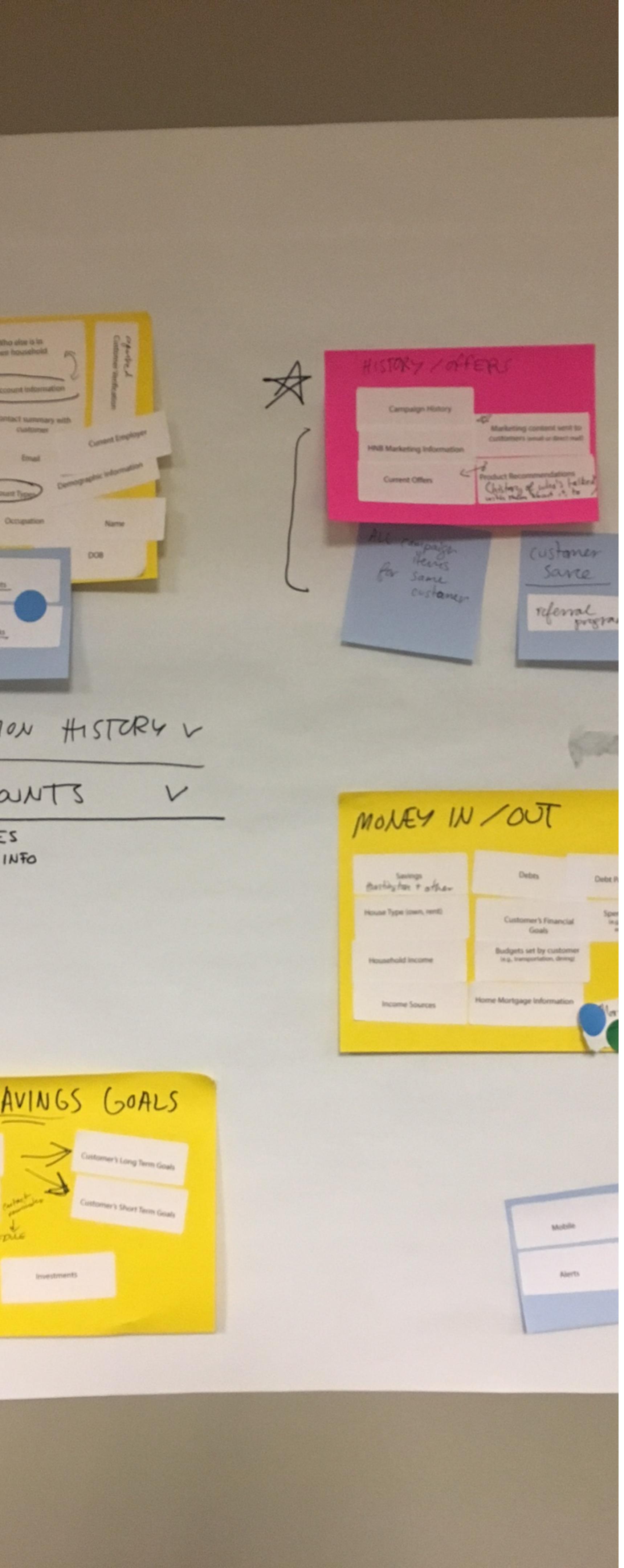
Designing an ideal backroom activity

Prepared by:

Vikas Jangam
Experience Researcher

Bekka Denning
Experience Researcher



The intent of this document

This deck describes a tried and tested approach for developing a backroom activity to effectively involve observers in data collection and analysis.

It is not intended to be an exhaustive reference. Rather, it is a collection of materials and ideas that should be updated as new ideas and techniques become available

Section 1

Why do we need a backroom activity?

Challenges in running a research study:

When conducting a research study or usability testing we often have clients and/or fellow teammates from different domains observing the study and providing their insights. It is important that these observers understand the objective of the study, so that they can follow through, stay engaged, and contribute usefully. When done right, those extra brains help us capture much richer data. But such eco-system comes with a lot of challenges which if unaddressed might make the data unusable or misleading:

Clients and us don’t see eye-to-eye

- Not everyone on the client side may be abreast with the study, leaving them unaligned and uninformed of the objectives of the study.
- Without proper alignment and exchange of insights, it is likely that the clients leave the room with misaligned expectations from the final report

Varying vested interests

- Developers, Designers, Researchers, POs, Marketers, all have different interests and perspectives which shape what they observe during the study. It is the our responsibility to align everyone such that their observations are ultimately- useful to us.

Sticky notes everywhere!

- The challenges mentioned above, coupled with lack of protocols for using sticky notes often leads to a pile of stickes which lack context and meaning to us making it difficult to use them for further analysis or evaluation.

How can a backroom activity solve the problem

A ‘backroom activity’ is basically an effort we put into structuring how the observers contribute to the study and also help the clients align with the research goals. The framework described in this doc addresses all the mentioned challenges and could even boost the quality of analysis and the final report.

Helps observers focus on what’s important
While clients may have helped set study goals, it’s not always clear to them how those map into the study’s activities while they’re observing. By helping them recognize which key question they should be listening for at any given time, they can become invaluable notetakers and allies for the research team.

Gets observers and researchers talking together
It provides a protocol to facilitate active engagement between the research team and the backroom participants. It supports the debrief conversation at the end of each session helping the group draw observations together throughout the testing process.

Gathers rich data and organizes it before leaving
One of the key challenges of data analysis is making sense of all the sticky notes upon returning to the office. This doc has protocols to organize the sticky notes in a structured format and avoid such chaos.

Aligns expectations about important findings
When the clients actively participate in the research sessions following the backroom activity, both the parties leave the facility with shared conclusions about the critical findings and expectations on the final report and next steps.

Leverages each observer’s area of expertise
Developers, Designers, POs, and Marketing all have different vested interests in the project and they all bring diverse perspectives to the table. This doc helps you enable all of them to do their individual best and still give you useful data.

Scaffolds the final report
A part of designing the backroom activity is forming “Key questions”. These key questions can drive your research study plan and serve as foundation for rest of the process, potentially speeding up writing of your final report.

What's in the doc?

Backroom Activity Guide

Helps the backroom participants easily understand and follow through the sessions, maximizing their contribution.

Protocols

Debriefing Protocol– helps researchers and clients discover the major findings and align expectations about final report

Protocol for Organizing Sticky Notes– helps researchers save time and make most out of the data for deeper analysis back at office and writing the report.

Section 2

Backroom Activity Guide

Backroom Activity Guide – The booklet

Primary objective of the backroom activity guide is to help the backroom participants follow through the activities in your session guide. The guide can be a simple booklet or plain sheet handed down to backroom participants, having participant-friendly descriptors and questions to help them follow along during research sessions.

The questions in the activity guide need to reflect the research goals. You will want to finish your session guide before beginning to build the backroom activity as the session guide determines the structure of the backroom activity guide and the questions in it.

M&T Bank Alexa Banking Study

Let's learn about what's best for our users!

Instructions

- The booklet is designed to aid you understand the objective and primary research questions for each activity.
- Please use post-it notes to record your observations and responses for each activity.
- Ian is your ally in following through the activities. Please reach out to him if you have quesstions!

Activity 1: Getting to know the participant

How sophisticated is their Alexa usage?

Why does the user like using Alexa at home?

Activity 2: Users are asked to install the M&T Alexa skill using the mobile app.

Do they learn about the two main features - 'check balance' and 'check transactions' during this activity?

Activity 3/4: Using the features on Alexa

- ○ Checking balance
- ○ Last transaction

How did users feel about the conversation with Alexa?

What phrases did the user use?

Why does/doesn't the user want to use Alexa over their mobile app?

Session Guide:

M&T Bank

Alexa Usability Testing

The goal of **this document is not to be a script of the sessions, but rather, a guide.** Throughout the session, the facilitator will probe and follow-up with additional questions as needed. Detailed questions are most often asked at the end to obtain natural, unaided feedback first.

Observers will have the opportunity to provide additional questions, as time allows.

Session Activities

Steps	Time (est)
1. **Welcome & Introductory Questions** Open ended discussion about banking and smart speaker use	10 minutes
2. **Proof of Concept (POC) Usability: Install Skill** Task to determine if participants can install the POC on the smart speaker	15 minutes
3. **Check Account Balance** Task to determine if participants can check their account balance using the POC	10 minutes
4. **Check Recent Transactions** Task to determine if participants can check their recent transactions using the POC	10 minutes
5. **Expectations & Value Conversation** Reflective conversation to understand participants' perception of the POC	20 minutes
6. **Other Use Cases & Commands** Activity to determine what users value in a bank skill	20 minutes
7. **Wrap Up** Opportunity for final participant feedback and questions.	5 minutes

A Session guide (aka, facilitation guide) is an internal doc that the researchers use to help themselves steer sessions with the users.

Backroom activity guide: A booklet designed for a research study for M&T bank on Amazon's Alexa.

How to frame the questions-

Often times, the participants in the backroom lack context and understanding of our research objectives. Also, they may not always speak the research language. It is important that we design these questions in a way that the participants understand and relate to.

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How form the questions

Each session has multiple activities that the researcher will have the participant do. Each activity aligns with one or more of the research goals you used to design your study. Use those goals to create questions that the backroom participants can ask themselves before that activity begins.

Note: We advise against picking questions from the session guide because it does not guarantee that the clients actually understand them.

<u>Questionable questions:</u>
"Did they find the button easily?" or "Did they click the button?" These questions could get a note for the first participant or two and then no notes as the sessions continue. Observers will rationalize that they're just seeing the same behavior over and over, and it hasn't changed across participants. This doesn't get you the insights you need.

<u>Better questions:</u>
"What decision caused them to click the button?" or "What do they need to know before they click the button?" These questions will encourage more active notetaking and richer insights.

How to frame the questions-

Keep the client in mind!

In an ideal world, the research goals of a study must completely align with expectations of the client sitting in the backroom. But that's in the ideal world, and it is not ideal for us to design for the ideal world (just a little word pun there ☺). The interests of clients who walk into the study may not always align with that of the research team. If the questions on the guide don't resonate with client's interests, it is likely that they will go about doing their own thing.

So, it is very important that the questions are used to bridge that gap between the client and the research team. This can be achieved in multiple ways:

<u>Seeking client feedback</u>

If time permits, it could be always beneficial to have a goals alignment meeting with a client early-on where everyone comes on to the same page on what we are trying to observe and understand from each activity within a session. That information would then translate to the questions.

<u>Be inclusive</u>

When time is not an amenity you can afford, do as much as possible to consider how you can be inclusive of what client is trying to get out of the study and align them with the research goals. Pay attention to the jargon used in the questions, sometimes]being unable to relate to questions might throw them off.

<u>It still works</u>

We observed that this framework coupled with the debriefing protocol still works because ultimately we will be making client answer what they observed in accordance with the research goals during debriefing activity. (more on it in the next section)

How to frame the questions-

What NOT to do ...

Keep in mind that the backroom participants have limited time and energy to follow through the sessions. The guide should not distract them, but rather enable them to do better notetaking.

Don't ask too many questions:
The questions under each activity must be shaped to spark their curiosity and seek out that bit of information during the session. Too many questions will distract them.

Don't ask quantitative questions:
Questions like "How many times did X happen?" "Did user click on Y?" etc. can be very difficult to follow through. Avoid them when possible.

Don't ask survey questions:
Asking survey questions with 7-point scale, agree/disagree etc. can put very high cognitive load on the participants.

KEY TAKEAWAY

A lot could be asked for the backroom participant to do, but their successful participation depends on how well they follow through the activity, how well are they rewarded for their participation, and the level of alignment between the activities and their interests in the research study. The questions we design for the backroom activity guide should be a medium to facilitate all of the above to the participant.

Backroom activity – Instruction sheets

Instruction sheets: We hung these instructions sheets on the wall as a quick self-onboarding guide for participants who entered the backroom in the middle of sessions and when the facilitator could not onboard them.

Sheet 1: describes the overall framework of the backroom activity and different resources they could use.

1 How is the backroom activity run?

For each test participant get a new color of sticky notes out of the manila folder. Please pass those out to the everyone in the back room.

Use the MX Study Guide sheet to guide you through the session. It will help you know which questions to focus on when taking notes.

The How to take notes sheet will help you know, well, how to take notes. :)

At the end of each session, we will debrief and move the notes you've taken to the matching large poster paper hanging on the wall.

At the end of the day, we'll summarize and talk about our priorities.

Sheet 2: provides tips and tricks on how to take notes and what to focus on. ***Thanks to Jackie Greenfield for these notes!***

2 How to take notes?

Focus your notes on the anecdote/quote level:

This: "Mark thought that advice need to be delivered this way, because he is a business owner, and it's important to them that they are able to X, Y, and Z so that he feels A, B, and C." (good detail!!)

Not this: "Mark wanted to get advice. Mark wanted it to be easy." (too generic, not useful)

Feelings: What caused the customer to feel a certain way?
i.e. They felt x because …

Contexts: Where was a customer when something happened? What caused it to happen?
They experienced y when …

Motivations: Why do they want this?
They wanted z because …

Benefits: How does that help them?
Z helped them feel y … or Z helped them accomplish x …

This part of the Backroom activity guide is generic to all studies. It can be used as a template for any study run in the future.

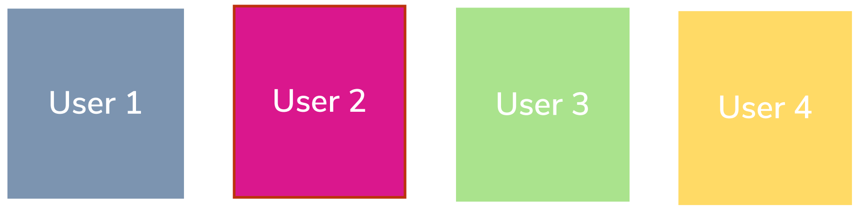
Section 3

Protocols for running your backroom activity

Protocol for organizing sticky notes

One measure to avoid the mess with context-lacking/unidentifiable sticky notes is an age-old technique followed by UXers - Assign a unique color to each participant. It then becomes the backroom facilitator's responsibility to switch out the sticky pads after each session.

Grouping by activities
- Place large sheets of paper on a wall with the questions from the guide.
- Encourage participants to try and answer those questions during each session.
- After each session, participants transfer their sticky notes to the sheets they see appropriate.



Preassigned colors for each session

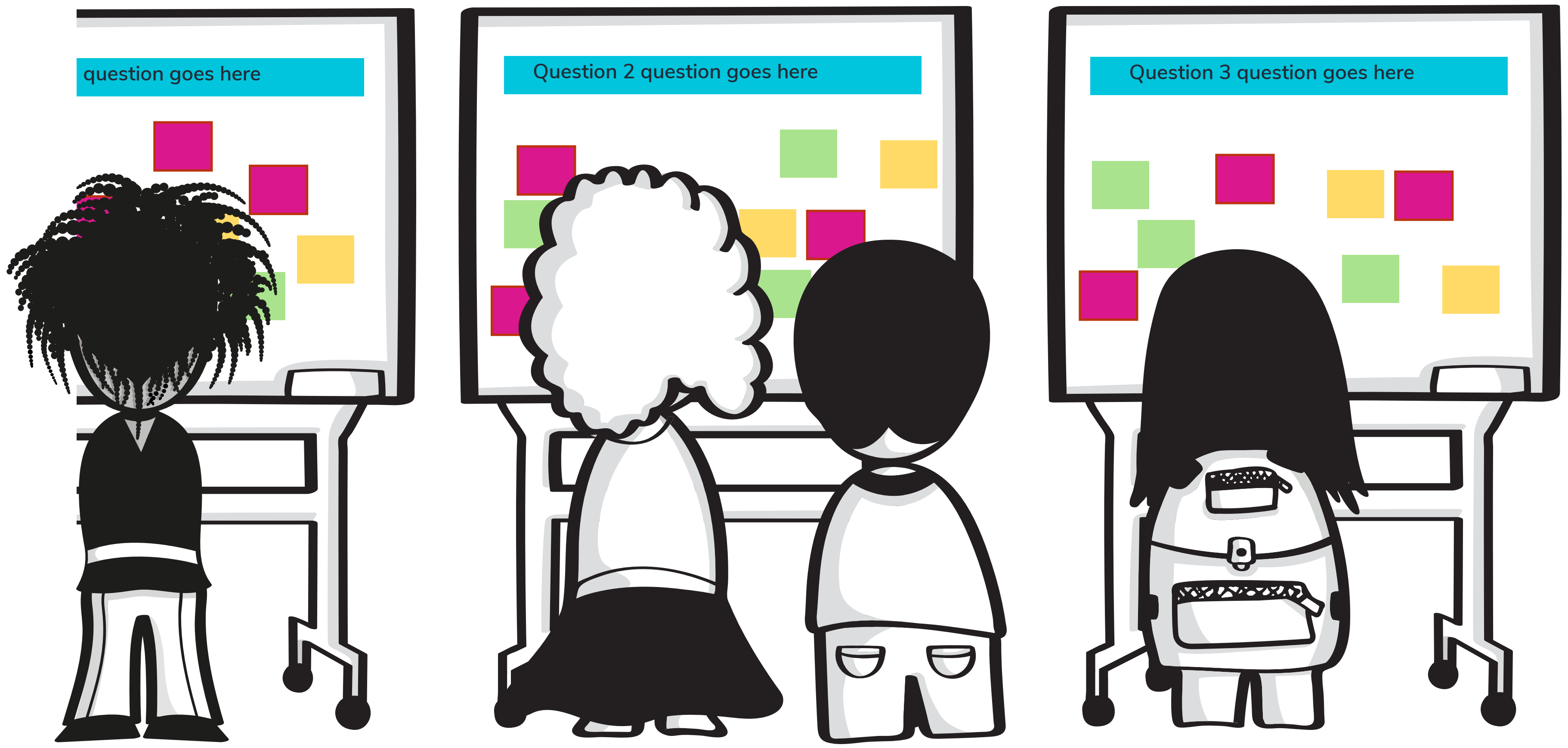
This not only helps make stickies a lot more useful but is also foundation for the debriefing protocol in the next slide.

Debriefing Protocol

After each session, meet with participants in the backroom to discuss what they just learned, while encouraging them to move their stickies to one of the questions as they see appropriate

As new ideas and patterns emerge, capture those on new sheets and label them. Example : “Priorities”, “Others”, “Want to have”, etc.

As the day progresses, work with the client to identify the key findings, prioritize issues and form a baseline expectation of the final report.



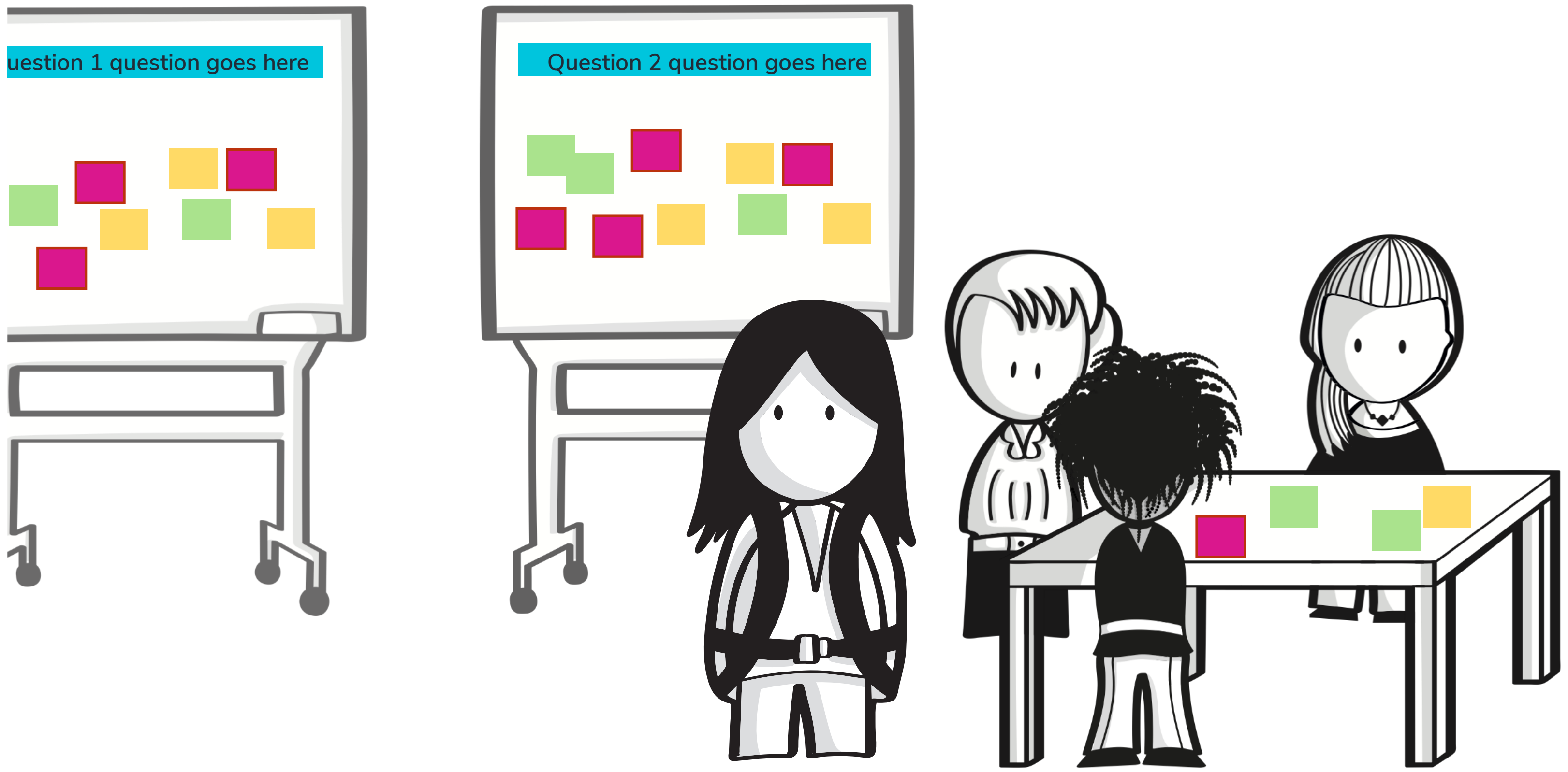
Facilitating the backroom activity

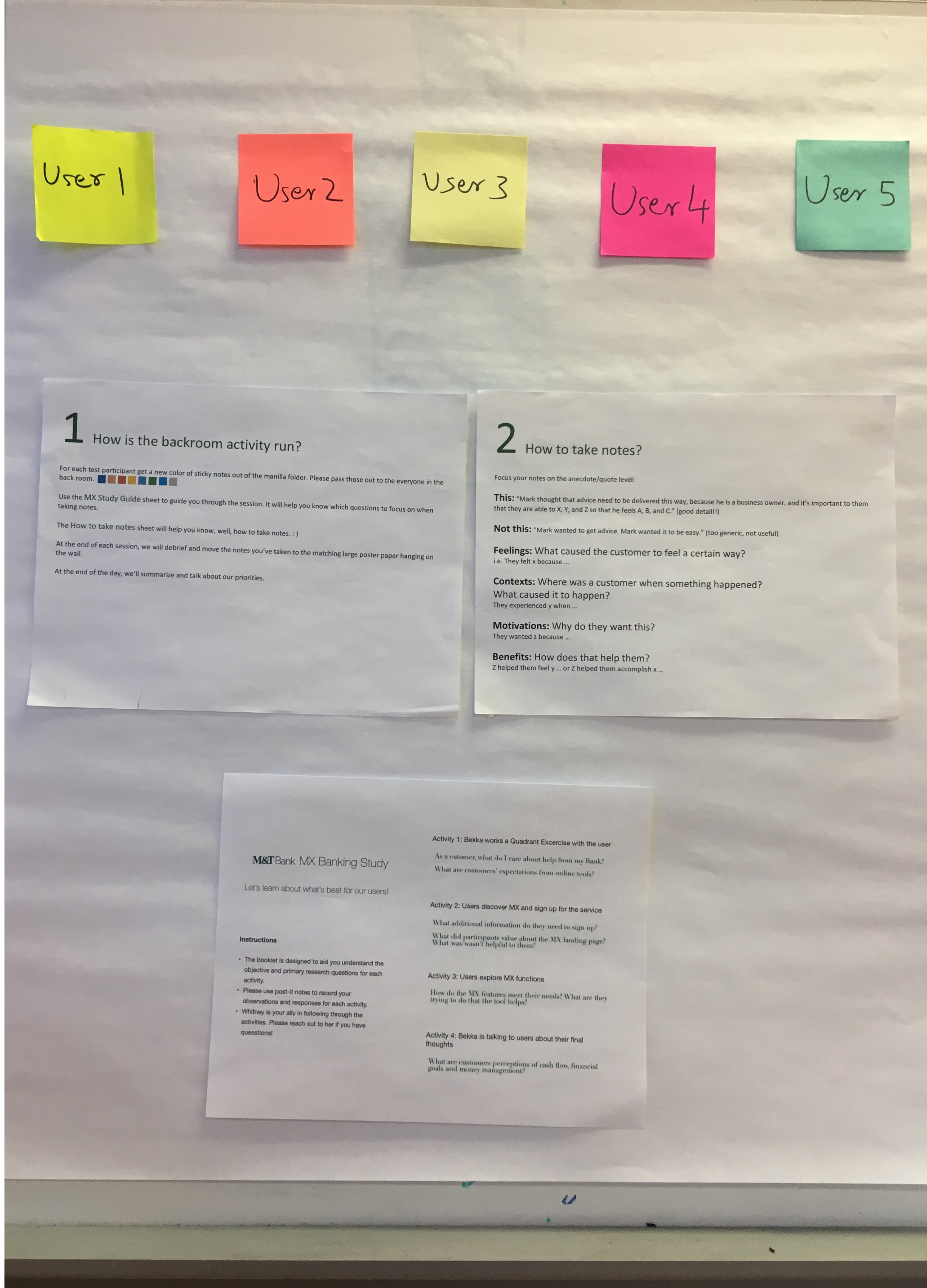
A Facilitator (research team's ally who is in the backroom along with others) should preferably be someone from the design team who is well acquainted with the project and the research study.

Their responsibility is to explain the guide and the protocols to backroom participants and help them throughout with any questions. They may also need to prompt when a new activity begins within a session.

They are also responsible for switching out different colored sticky notes after each session.

A **caveat**, however is that unless you can assign a dedicated facilitator, they would also have their own interests from the study. The facilitation responsibilities cannot hinder them from focusing on what's important to them. This means that there might be times when the researcher or the note-taker might have to take up facilitation responsibilities as well.



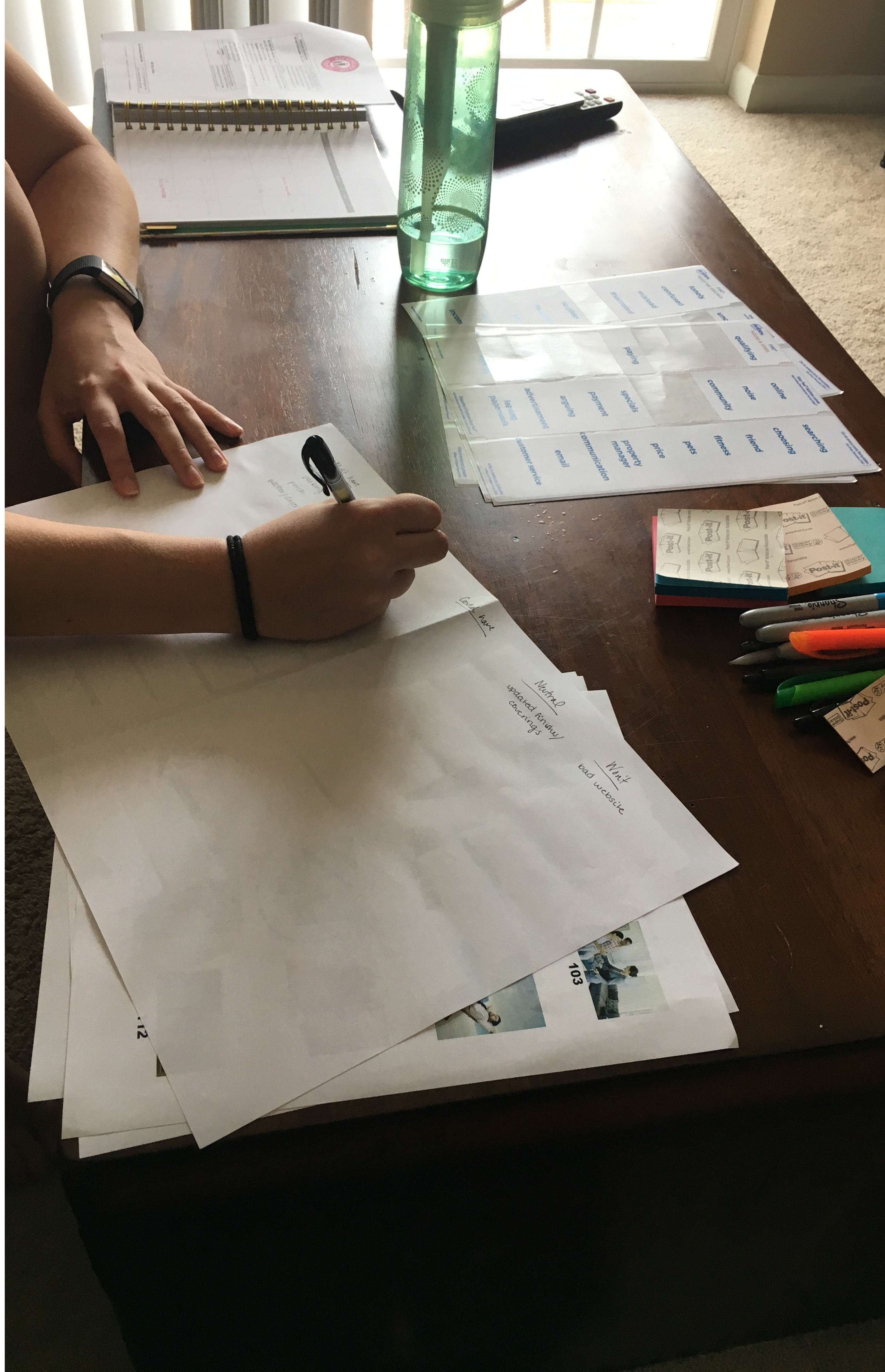


Final takeaways

From our experience so far, we've found that this setup fosters a **rich exchange of dialog between the backroom participants and the research team**, with their observations and ideas being organically documented on the wall.

This enabled us to do a final debriefing at the end of the day with the clients where we all **collectively identified the major takeaways** and created a baseline chart with the critical and non-critical findings.

Additionally, the **organized data enabled our research team to do deeper data analysis back at Clutch**, thereby enhancing the quality of the final report without much additional time and effort.



Still have questions?

If you still have questions about backroom activities, please reach out to me.

Vikas Jangam
vjangam@meetclutch.com

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