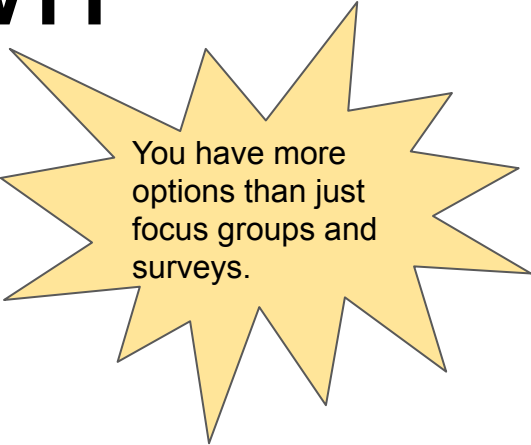


Choose your own ~~adventure~~ user research



You have more options than just focus groups and surveys.

Click the links to find what method to use to answer your question.

[Start here](#)

(Or you can jump to the [list of all questions](#) or [list of all methods](#).)

Does the feature you're interested in already exist?

No. (Or ideally no. There are questions we should have asked before building.)

Not yet, but we're working on it. (These are questions we can ask while building.)

Yes. We want to improve something that's live on site. (These are questions that can only be answered on the live site.)

Do you know what you want to build?

No. I need to figure out [what to build](#).

Kind of? I have an idea and want to know [whether to build it](#).

Yes. I've verified that people need this feature. Now I need to know [how to build it](#).

Ah. That's more of market research than user research.

Are you wondering whether people will pay for the feature?

Yes.

No.

What do you need to understand more about before you design it?

Who the users are (What motivates them? What are their needs?)

How the users act

Where users will expect to find this feature (and what connections they see between it and existing features)

What do you need to know about how the users act?

How they currently solve a problem (habits they have, workarounds they've developed)

Their big-picture context of need (their actions over time, their influencers)

What do you need to learn before developing something?

Whether people will be able to use the proposed design (or what issues they encounter using an earlier version of this feature)

Whether people will be able to find the key calls to action (or whether they understand the key messaging on the page)

Whether people can navigate to (or through) this feature

What do you want to know about this live page?

Whether people use the page

People's impressions of the page (or some part of it)

How to tweak it (to optimize for something specific)

Can you clarify what you mean by “use the page”?

Whether they're able to use it

Whether they actually are using it

What about people's impressions of the page?

Whether people understand it

How people feel about it

Questions

Who are the users?

What do the users need?

Will people use [a feature]?

What is the user's (big picture) workflow?

How do people currently [solve a problem]?

Will people pay for [a product]?

Where should [this feature] live?

Can people find [this feature]?

Can people use [this feature]?

Will people notice [something]?

Do people engage with [this feature]?

Is ___ or ___ more [adjective]?

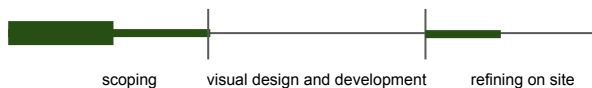
How do people feel about [something]?

Do people know [some message]?

How to answer: “Who are the users?”

When to use

At the start of a project. Again after launch when we have access to live usage data.



Methods to use

- [User interviews](#)
- [Sales safari](#)
- [Diary study](#)
- [Observation study](#)

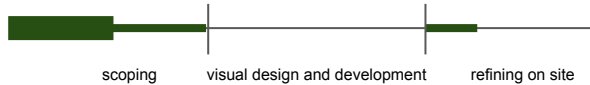
Example questions

- How do teachers view professional development?
- How do parents select media appropriate for multiple kids?
- What motivates people to advocate?

How to answer: “What do the users need?”

When to use

At the start of a project. Possibly again after an unsuccessful launch.



Methods to use

- [Experience sampling](#)
- [Sales safari](#)
- [Diary study](#)
- [Observation study](#)

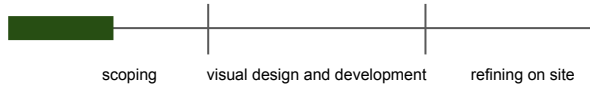
Example questions

- What professional development topics are teachers most interested in learning about?
- What frustrates or confuses parents about finding media for their kids?

How to answer: “Will people use [a feature]?” “Do people want [a product]?”

When to use

Before deciding whether to move forward with a new project.



Methods to use

- [Concierge MVP](#)
- [Fake doors experiment](#)
- [Crowdfunding campaign](#)
- [User interviews](#) (unreliably)

Related question

- [Do people engage with \[a feature\]?](#) (once it's live on site)

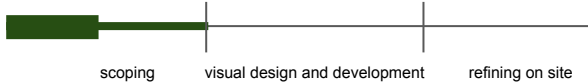
Example questions

- Are people interested in advocating on behalf of kids?
- Do people want customized News about kids?
- Would people pay to have a whitelist of approved edtech?

How to answer: “What is the user’s (big-picture) workflow?”

When to use

At the start of a project.



Methods to use

- [Diary study](#)
- [Observation study](#)
- [User interviews](#)

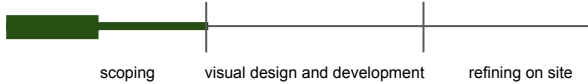
Example questions

- How do parents approach finding media?
- How do educators incorporate privacy practices into their daily work?

How to answer: “How do people currently [solve a problem]?”

When to use

At the start of a project.



Methods to use

- [Observation study](#)
- [User interviews](#)
- [Diary study](#)

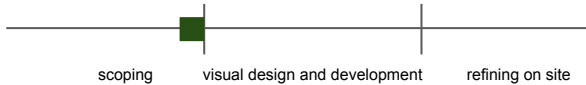
Example questions

- What workarounds have teachers developed for using our edtech tool finder?
- How do parents find suitable media when shopping in a physical store?

How to answer: “Will people pay for [a product]?”

When to use

At the start of a project, after scoping and before development



Methods to use

- [Crowdfunding campaign](#)
- [Concierge MVP](#)
- [Fake doors experiment](#)
- [User interviews](#) (unreliably)

Example questions

- Would parents and educators be willing to pay for news about kids?
- Would parents be willing to pay for reviews of YouTube channels?

How to answer: “Where should [this feature] live?”

When to use

Near the end of scoping, toward the beginning of design



Methods to use

- [Card sort](#)
- [Tree study](#)
- [Micro-survey](#)
- [User interviews](#)

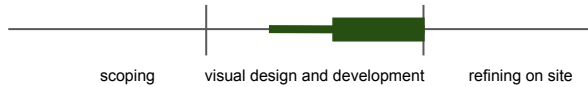
Example questions

- Where in the navigation will people expect to find “teaching strategies”?
- What items do people expect to find in the same menu as “best movies”?

How to answer: “Can people find [this feature]?”

When to use

During development



Methods to use

- [Tree study](#)

Example questions

- Is “teaching strategies” a label that makes sense to educators?
- Can people find “Tomato” under “Vegetables”?
- Do people select the correct top-level menu to find parenting advice?

How to answer: “Can people use [this feature]?”

When to use

During development. Ideally, again after launch



Methods to use

- [Usability study](#)
- [Observation study](#)

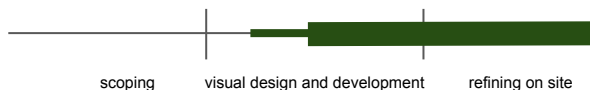
Example questions

- Can people find age-appropriate media for their kids?
- Can people complete the registration form?
- Can people contact their legislative representative?

How to answer: “Will people notice [something]?”

When to use

During development. Ideally, again after launch



Methods to use

- [First-clicks study](#)
- [On-site click maps](#)
- [Usability study](#)

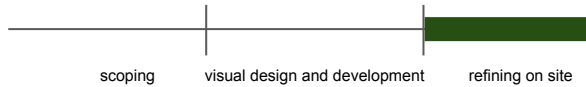
Example questions

- Can people find the button to sign up for our newsletter?
- Do people realize they can scroll down?

How to answer: “Do people engage with [this feature]?”

When to use

Once a feature is live on site



Methods to use

- [On-site click maps](#)
- [On-site analytics](#)

Related question

- [Will people use \[a feature\]?](#)

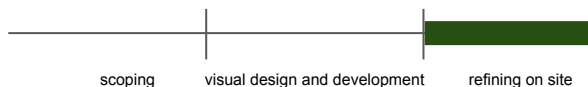
Example questions

- How many users of review pages are clicking to expand user reviews?
- Do people click the affiliate buy button?

How to answer: “Is ____ or ____ more [adjective]?”

When to use

Once a feature is live on site



Methods to use

- [A/B test](#)

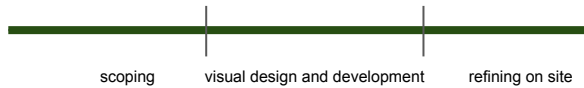
Example questions

- Is a link to the blog or to the advice pages a more compelling way to bring people deeper into the site?
- Are people more likely to click “donate” or “be a donor”?

How to answer: “How do people feel about [something]?”

When to use

At any stage, depending on the question



Methods to use

- [Micro-survey](#)
- [On-site survey](#)

Example questions

- Do the movie review pages help people to make a decision about whether to watch a movie?

How to answer: “Do people know [some message]?”

When to use

During design or later to check understanding.



Example questions

- Do people interpret a visual scale as representing quantity or quality?

Methods to use

- [Micro-survey](#)
- [On-site survey](#)
- [Usability study](#)

Research Methods

[Experience Sampling](#)

[User Interviews](#)

[Sales Safari](#)

[Diary Study](#)

[Observation Study](#)

[Concierge MVP](#)

[Fake Doors Experiment](#)

[Crowdfunding Campaign](#)

[Card Sort](#)

[Tree Study](#)

[Usability Study](#)

[First Clicks Study](#)

[Micro-Survey \(Custom Quantitative Study\)](#)

[On-site Survey](#)

[On-site Click Maps](#)

[On-site Analytics](#)

[On-site A/B test](#)

Experience Sampling

What it is

Experience sampling is asking people the same question repeatedly to identify key needs or frustrations.

For example, we can send a group of teachers repeated text messages asking “what did you most recently find frustrating about teaching?”

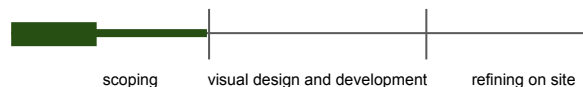
After collecting about 1000 usable responses, we tag and cluster them to identify trends.

Questions it answers

- [What does the user need?](#)

When to use it

At the start of a project, when deciding what user problems to solve.



User Interviews

What it is

A user interview means having conversations with a small number of target users one at a time.

In each interview, we ask people a semi-structured set of questions to learn about their needs, motivation, and workflow.

After interviewing 3-7 people for 30-60 minutes each, we analyze responses to identify trends.

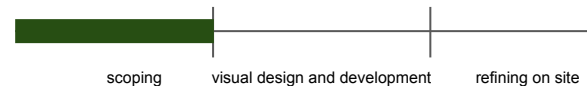
This interview can give context about *why* people do things but not about *what* most people do. It can raise questions about *what* people do to be answered with quantitative studies and analytics.

Questions it answers

- [Who are the users?](#)
- [Will people use \[a feature\]?](#)
- [What is the user's workflow?](#)
- [How do people currently solve a problem?](#)
- [Where should \[this feature\] live?](#)

When to use it

At the start of a project, when deciding what user problems to solve. During later phases to gather context in conjunction with [usability studies](#).



Sales Safari

What it is

A sales safari means lurking at places online where your users talk to each other. It's a way of observing them without introducing bias through observation.

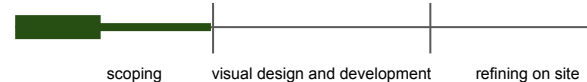
For example, to see what challenges teachers face we could read the questions they ask on an education forum.

Questions it answers

- [Who are the users?](#)
- [What do the users need?](#)

When to use it

At the start of a project, when deciding what user problems to solve.



Diary Study

What it is

A diary study gets people to record their actions over time. It can have them record evolving needs over time or their interactions with a product or feature.

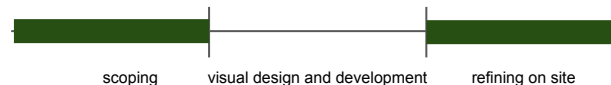
A diary study is usually concluded by a [user interview](#) with each participant.

Questions it answers

- [What is the user's workflow?](#)
- [Who are the users?](#)
- [What do the users need?](#)
- [How do people currently solve a problem?](#)

When to use it

At the start of a project to learn about the user's context of need. After the launch of a large feature to learn how people use it.



Observation Study

What it is

An observation study means watching people complete tasks in their natural context in order to learn difficulties they encounter and about environmental factors which impact how they do things.

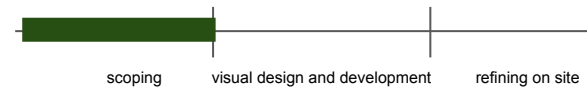
An observation study can be fairly free-form, providing data similar to a [user interview](#) or short term [diary study](#) or can be structured with specific tasks as a form of in-situ [usability study](#).

Questions it answers

- [How do people currently \[solve a problem\]?](#)
- [Can people use \[a feature\]?](#)
- [Who are the users?](#)
- [What do the users need?](#)
- [What is the user's workflow?](#)

When to use it

At the beginning of a redesign to determine what problems people encounter with an existing feature. At the beginning of a new initiative to learn how people currently solve a problem.



Concierge MVP

What it is

A Concierge MVP means making a minimal version of a product to determine whether people will use it. It means creating a version of a product that would not scale in order to determine whether a full-scale version should be built. It often means building a front-end and then manually implementing the back-end.

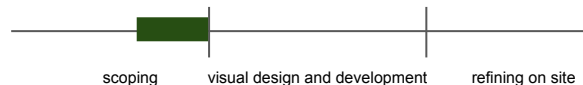
For example, if we wondered whether teachers would use a resource providing custom lists of tools, we could create a front-end where people input their requirements. Rather than building the back-end we would have a person manually handle the inputs and send back a response. Once we reached a threshold (say 100 requests in a day), we would know there is sufficient need for the feature and build it out in full.

Questions it answers

- [Will people use \[a feature\]?](#)
- [Will people pay for \[a product\]?](#)

When to use it

Just before development begins, when deciding whether to create a new feature.



Fake Doors Experiment

What it is

A fake doors experiment means putting a link on the site to a feature that doesn't exist yet in order to see whether people are interested in that feature.

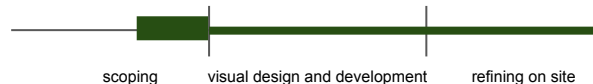
It should be used with caution because it can be a very negative experience for the user to be intentionally led to a dead end. It should only be used if we can provide something for people who we lead down this path. It's a best practice to give people a way to sign up to be notified when the feature does exist and possibly also gift card or link to a similar feature for the time being.

Questions it answers

- [Will people use \[a feature\]?](#)
- [Will people pay for \[a product\]?](#)

When to use it

Just before development begins, when deciding whether to create a new feature.



Crowdfunding Campaign

What it is

A crowdfunding campaign means asking people to donate money in support of a feature.

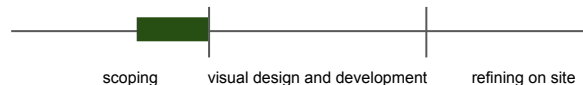
What people say they'll do in a [user interview](#) is often different from what they actually will do. A crowdfunding campaign is a way of seeing if people will put their money where their mouths are.

Questions it answers

- [Will people pay for \[a product\]?](#)
- [Will people use \[a feature\]?](#)

When to use it

Just before development begins, when deciding whether to create a new feature.



Card Sort

What it is

A card sort means giving a group of 30 or more study participants a set of 20-30 of items and asking them to group those items in whatever way makes the most sense to them.

A closed sort is one where we give people the categories ahead of time. It can be used to see whether people can identify the categories we expect for new items or to tell us where new items should be located.

An open sort is one where we ask people to name the categories they create. It can be useful in coming up with possible names for navigational areas.

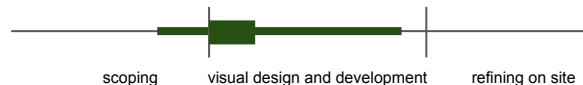
A card sort is a good way of restructuring a part of a tree between [tree studies](#).

Questions it answers

- [Where should \[this feature\] live?](#)

When to use it

When restructuring navigation. When designing a set of new features and wondering if their labels are clear. When designing a major new feature and wondering what other navigation items people will associate it with.



Tree study

What it is

A tree study means giving people specific tasks and a navigational tree and seeing where they would look to solve the tasks.

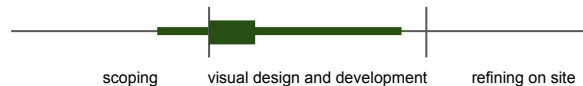
Seeing where people have the most difficulty helps to focus on which part of the tree to change. That part can be studied in a [card sort](#) to create a new hierarchy for a follow-up tree study.

Questions it answers

- [Can people find \[this feature\]?](#)
- [Where should \[this feature\] live?](#)

When to use it

When restructuring navigation. When designing a set of new features and wondering if their labels are clear.



Usability Study

What it is

A usability study means sitting participant in front of a prototype or live interface and asking him/her to complete tasks. A total of 3-5 participants is usually enough to uncover any major usability issues, although in some cases up to 8 may be necessary.

Ideally most tasks should be realistic things that we know people want to accomplish (as determined in [user interviews](#), [sales safaris](#), [experience sampling](#), [diary studies](#), or [observation studies](#)). In addition to user goals, the tasks can also include business goals.

A usability study usually concludes with a [user interview](#) to get some qualitative feedback on specific questions we have about the design.

A usability study is the qualitative form of a [first clicks study](#).

Questions it answers

- [Can people use \[a feature\]?](#)
- [Will people notice \[something\]?](#) (which it doesn't answer very well because it gives only a small number of data points)

When to use it

Throughout design (and after launch if there can be further iterations)



First Clicks Study

What it is

A first clicks study means giving a group of 30 or more participants a collection 5-10 tasks and seeing where they would click first on a static mockup to complete those tasks.

Seeing where people would click first can help to tweak the visual hierarchy of a page and to identify where labeling/messaging is unclear.

A first clicks study is the quantitative form of a [usability study](#). It is like a small-scale [click map](#), but also gives context for why people are clicking where they click.

Questions it answers

- [Will people notice \[something\]?](#)

When to use it

During design or before redesign of a live feature.



Micro-Survey (Custom Quantitative Study)

What it is

A custom quantitative study is a way of answering what people think in a particular context. It's a good way of figuring out whether many people understand a particular feature or label.

For example, we might put together a 3 question survey to determine whether people understand the meaning of the content grid and distribute it to 30 people who aren't current users of the site. Or we might put together a 4-question survey to see how current Media users feel about Common Sense getting involved in advocacy and distribute it to the beta-testers list.

See also: [on-site survey](#).

Questions it answers

- [Do people know \[some message\]?](#)
- [How do people feel about \[something\]?](#)
- [Where should \[this feature\] live?](#)

When to use it

use at any point to answer a narrowly-scoped question that has come up



On-site Survey

What it is

An on-site survey is a way of determining how people perceive something about a particular page or about the site as a whole.

For example, we could use an on-site survey to benchmark whether the review pages help people to make a decision.

On-site surveys should be used sparingly in order to avoid annoying regular users with repeated pop-ups.

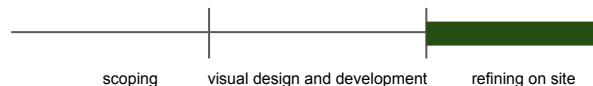
See also: [micro-survey](#).

Questions it answers

- [How do people feel about \[something\]?](#)
- [Do people know \[some message\]?](#)

When to use it

Whenever there's a question about a feature on the live site.



On-site Click Maps

What it is

An on-site click map shows where people click on an existing page (or set of pages). It can also show how far down that page people scroll.

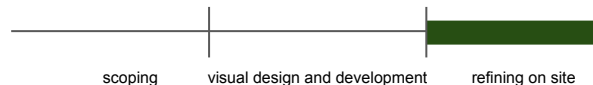
It reveals which interactive elements people are (or are not) engaging with. It can also show which parts of the page people expect to be interactive which are currently static.

Questions it answers

- [Will people notice \[something\]?](#)
- [Do people engage with \[a feature\]?](#)
- [Can people use \[a feature\]?](#)

When to use it

After launch to verify that a page is being used.
Before a redesign to see what part of an existing page should be preserved or changed.



On-site Analytics

What it is

On-site analytics provide usage statistics about pages as well as individual elements of pages.

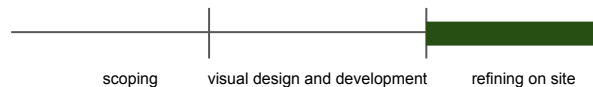
The most useful metrics are ratios. For example, the total number of users or reviews will only ever go up over time. The ratio of users who came to reviews from list pages to all users of reviews can indicate how well the list is driving traffic. Similarly, the number of pageviews will only ever increase. The ratio of entrances to pageviews will indicate whether traffic is largely coming from inside of or outside of the site and can increase or decrease over time.

Questions it answers

- [Do people engage with \[a feature\]?](#)

When to use it

After making any changes to the live site to see how these changes impact engagement metrics (such as average time on page, average session duration, exit rate, and pages per session)



On-site A/B Test

What it is

A/B test is a generic term which can refer to any testing of multiple variations. An on-site A/B test tweaks some element of an existing page (or pages) to see how it will impact engagement with a page element.

For example, we can change the text on a button to see if a different label makes people more likely to click it.

Questions it answers

- Is ___ or ___ more [adjective]?

When to use it

After launch to make tweaks to a page. If during design we're not sure which of two things would be better to put on a page, we can add them both and use A/B testing to show only one of the two to users.

