Audience Growth Through Structured User Testing

Or... Steal this public documentation to make sure you’re investing time in things your users actually want and need
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User research can seem complex...

- User research is the practice of talking to users through surveys, interviews, user tests and more, to answer questions to guide work
- It is typically used in the context of product-oriented work: user testing for an app, user interviewing to guide product strategy, etc
...but it doesn’t have to be

- However, other teams can and should be conducting user research
- It’s often more useful if it *isn’t* done by a product team
- Journalists are great at interviewing, listening, pulling together trends to tell a story
- That’s what user research is, just with a different application
If our small, remote team can do it, so can you!

- Our product team spearheads user research, maintains a catalog of observations and insights.
- Our teams and cities all have unique research questions, like:
  - What triggers a reader to open one of our newsletters? How much do different things like subject line, time of newsletter send and day of the week contribute to this?
  - What motivates readers to become a member of one of our local brands?
  - What can the needs of content creators in different cities tell us about possible expansion opportunities?
Our user research documentation system
The problem

● We wanted user research to be more accessible to all of teams at WhereBy.Us
● Product team doesn’t have resources to do all of this research, and we shouldn’t be doing all of it, anyway
● Our local or sales teams, for example, are already in constant conversation with their readers and customers
● Why would a product team be better at doing that user research?
The solution: A documentation system

Shared with me ➔ WhereBy.Us user research documentation (public)

Folders

- Onboarding documentation
- Project folders
- User documentation
The solution: A documentation system
The solution: A documentation system

- We created a five-step workflow for designing, running, and using the results of user research projects.
- The documentation lives in Google Drive and includes:
  - Training documents
  - Templates for project planning, interview notes, running different meetings, etc
  - A structure for organizing projects
We divided projects into 5 steps

- We’ll run through the 5 steps, along with a case study of a project we did with our local team, which produces newsletters in 5 cities
  - Local project was the “pilot” project of documentation system + we learned tons from it
- The steps are outlined in a workflow document
Here’s an overview of different meetings, tasks and templates to fill out as you make your way through a user research project.

Where should I store my retro notes, sensemaking notes, audio files and transcriptions?
- In our “User Research” folder, there’s a subfolder called “Project Folders”
- In “Project Folders” you should create a new folder for each project.
- In your project folder, you should paste in copies of documents in “Project Folders” which include a retro document, a sensemaking document and a research plan document. You should also store your recordings and transcriptions here. You probably want a separate subfolder for each interview, but it’s up to you.

Part one: Initial research planning (Sprint 1)
Helpful documents: Survey logistics & basic principles, Interview logistics & basic principles, Should I use a survey or interviews?, Research plan document to make a copy of and fill out for each project

1. Make a new folder in “Project folders” for your project, and copy in copies of the retro, sensemaking and research plan documents that live in the sample folder
2. You should start by spending a few minutes jotting down some thoughts about your research questions on the research plan document.
   a. Here are some questions to consider:
      i. On a broad level, what are you trying to accomplish? Some examples might be:
         informing how to approach a reporting project, informing a design decision such as a tweak to the newsletter layout, learning something broad about a product like motivations for membership, getting data for a specific product decision
      ii. Are you looking to get information on an ongoing question, like motivations for subscribing to a newsletter, or is this more of a one-off user research project for something more specific?
      iii. Would your questions be better answered with data, or with qualitative information you glean from a conversation? Would it be helpful to have a mix of both?
3. Optionally, grab 20 minutes on (product team member(s) calendar to hash out any questions you have about this initial planning
4. Next, have a 30 minute scoping meeting, where you’ll solidify your research questions
   a. This is a meeting with relevant team members, product manager and other product team members as optional
   b. The goals of this meeting are to determine what you want to research and the correct method for this research
Step 1: Initial research planning

- Initial planning and 2 half-hour research scoping and logistics planning meetings
- Usually can be accomplished within a week’s work
- Throughout this planning cycle, team members fill out a research plan document
  - Research questions
  - Surveys, interviews or both
  - How many participants + who should they be
  - Participant compensation, if any
Step 1: Initial research planning

**Pre-scoping meeting:** Jot down some of the basic ideas around your research. Here are some questions to consider:

1. On a broad level, what are you trying to accomplish? Some examples might be: informing how to approach a reporting project, informing a design decision such as a tweak to the newsletter layout, learning something broad about a product like motivations for membership, getting data for a specific product decision.

2. Are you looking to get information on an ongoing question, like motivations for subscribing to a newsletter, or is this more of a one-off user research project for something more specific?

3. Do you think your questions be better answered with data, or with more qualitative information from conversing with someone? Would it be helpful to have a mix of both?

**Scoping meeting 1**

1. What are the specific product decisions, questions for a reporting project, etc you are trying to inform with your user research?

2. What are the 1-3 most important questions you want to answer?

3. Do you want to run interviews or a survey (or both)? Check out some info on interviews and surveys here. You can also check out, "Should I use a survey or interviews?"

**Scoping meeting 2**

4. How many people should you interview or survey? Generally, we recommend 3-7 interviews, or trying to get around 20 survey respondents.

5. Who should you survey or interview? What criteria do you want these people to meet?

6. How will you find them? Do you have specific groups of people in mind already?

7. If surveying, how will you reach respondents?

8. What does your timeline look like? Do you have any concrete deadlines for this research?

9. Will you compensate your respondents or interviewees with ambassador points or ticket credit? Note that compensation is not required, but it’s highly recommended, and a good habit for us to get into as a company. Here are some notes on compensation.
Initial research planning: Local team case study

- **Big question:** What gets subscribers to open our newsletter?
- **Narrowed down to:** How does (opening the newsletter) fit into your life?
- Decided on both surveys + interviews
- Decided we wanted to target based on engagement level
  - Defined + targeted with MailChimp data
- **Compensation**
  - Survey: Referral credit
  - Interviews: Free newsletter ads or free membership, depending on who we were targeting
Step 2: Preparing and conducting research

- Consists of
  - Writing survey or interview questions
  - Scheduling and conducting surveys or interviews
  - Finding participants
- Bulk of the project, 2+ weeks of work
- Training documentation
  - How to choose a research method
  - Interview and survey logistics/guidelines
If the answers to some or all of the following questions are "yes," you might want to run interviews.

- My timeline for this project is flexible, and/or I have ample time and resources to devote to it.
- My research question is broader than simply getting data to inform something like a product decision or ongoing question.
- I’m looking to get some in-depth information about my questions, and would like to dig deeper if given the opportunity.
- It would be helpful for me to learn holistic information about the users I talk to. For example, it would be nice to know about their daily routines, occupations and family situations as well as information related to my questions.
- I could see this research question being ongoing, and would consider developing relationships with users so I could talk to them again in the future.

If the answers to some or all of the following questions are "yes," you might want to run a survey.

- My timeline for this project is shorter, and/or I don’t have as much time in my sprints to devote to it.
- My research question is more specific, and more quantitative results from enough survey respondents would be enough to give me adequate guidance.
- More holistic information about my survey respondents might be nice, but I don’t need it to do this project.
- My research question seems like it would be better answered by getting a larger quantity of responses from users.

If you answered "yes" consistently for both, and you have the time and resources, you might want to consider doing both interviews and a survey. For example, you might want to consider starting with a survey, and letting the results guide some later interviews.
What’s a user interview?

- A user interview is one of the most common methods of user research. A user interview is a conversation with a user, used to gather information to guide product and other decisions at a company. User interviews usually focus on how a user uses a company’s products, as well as a user’s feelings, motivations, routines and more. Typically, we schedule 30 minutes per user interview and run them with one to three interviewers. User interviews should be guided by a set of predetermined questions, but the candid nature of a conversation can allow for interviews to go to interesting places and for the interviewer to dig deeper than normal.

How do I know that I want to run a user interview for this question?

- Check out “Should I use a survey or interviews?”

What are the drawbacks of user interviews?

- Logistically complicated: User interviews are more logistically complicated than surveys. They require much more time, planning and coordination.
- Results depend more on the interviewer: User interviews go well once the interviewer is more accustomed to asking the right questions, probing for more detail when it seems right and taking good notes.
- Commitment from interviewee: User interviews require more commitment from the person being interviewed. You can’t run user interviews without committed participants willing to make time on their calendar a couple of weeks in advance and take time out of their day to talk to you.

What are the benefits of user interviews?

- Candid conversation: User interviews offer the opportunity for more candid, open-ended discussion with a user.
- Learn more holistic details about an interviewee: User interviews offer the opportunity to learn about a user’s interests, how long they’ve lived in their city, how they interact with our products and more.
- Open-ended questions and more in-depth responses: User interviews offer a great way to dig into questions that are open-ended and wouldn’t be good to ask in a survey, and get more in-depth responses.
- Build relationships with your users: Running a user interview with one of our users can open the door to a productive conversation and relationship for the future.
How do I know if I want to run a survey for this question?
- Check out “Should I use a survey or interviews?”

What are the drawbacks of running a survey?
- Less detail: Surveys give you less detailed and in-depth responses than user interviews
- Non-completion: Respondents might not answer every question if they aren’t all required, or might not complete the survey at all. Typically, you need to get the survey out to far more people than you’d like to respond to it to get a significant enough number of responses.
- Selection bias: The people who opt-in to fill out a survey tend to be superusers and different from our typical reader. This is the same bias that might make someone write a Yelp review or participate in a focus group.
- More black-and-white responses: Surveys are useful for questions with set answers, but not as useful for anything that’s open-ended.

What are the benefits of running a survey?
- Logistically easier: running a survey is far simpler than running a series of user interviews. There are less individual pieces to coordinate and interviews to transcribe, it’s easier to get results, it’s easier to get the survey out to readers and it’s easier to analyze responses
- Less time: Surveys require far less time than running a series of user interviews.
- Easier to get quantitative data: If you have specific questions with more black-and-white answers, a survey might be a simpler and easier way to do your research

What makes good survey questions?
- When considering your core questions, think to yourself, what are the biggest things I’m trying to get out of this survey, and what are the easiest ways to dig into that?
- Depending on your questions and goals, it can be good to ask a mix of open-ended and multiple choice or check-multiple questions
- We recommend structuring your survey around three to five core questions, aside from our introductory questions we recommend asking in every survey.
- If you’re interested in digging more into demographic questions, here’s some documentation around how to ask those...
Preparing and conducting research: Local case study

- 15 interview participants -- 2 to 4 per brand
- 661 survey respondents -- 65 to 196 per brand
- Much harder to find interview participants
  - Tried many methods of targeting -- links in newsletters, directly targeting using MailChimp data to find desired engagement level so we could target via email, tried different types of compensation, etc
- Took longer than 2 weeks
Step 3: Compiling results

- Noting initial survey and interview takeaways
- Cataloging interview audio recordings and survey data
- Can usually be done side-by-side with conducting research
During the interview
- Note (approx time)
- Note (approx time)
- You can also just note some timestamps in the interview to come back to -- whatever note-taking system works best for you is fine

Post-interview
- Spend 5-10 minutes jotting down some initial takeaways
Compiling results: Local case study

- Took notes during interviews
- Logged recordings and interview notes in our user research database
- Downloaded SurveyMonkey data for each survey, logged in database
Step 4: Sensemaking

- For each project, we run a one-hour *sensemaking* meeting
- Review who we interviewed or surveyed against our research question, discuss observations and insights from research, ensure we’ll be acting on the right insights
Sensemaking: Local case study

- Too much survey data to analyze, so focused on three questions
  - Made six main observations from results
- 15 interviews, so easier to parse through
  - Good notes make it easier
  - Seven main observations
- Scheduled retro meeting to review project, discussed incorporating results into quarter planning, scheduled meeting for next quarter to regroup + plan
Sensemaking: Local case study

- **Some observations: Surveys**
  - ~50% of respondents from Pittsburgh, Seattle, Miami, and Portland said they read because of habit or routine.
  - Orlando respondents more likely to say that having time to read factors into decision to read.
  - Feeling curious about the city is the biggest reason for all cities that respondents wanted to open.

- **Some observations: Interviews**
  - 3 readers said they were primarily interested in events when reading the newsletter.
  - 4 readers mentioned appreciating our more hard-hitting content.
  - 3 readers mentioned reading in 5 minutes or under.
  - 2 readers mentioned reading more out of habit than utility.
Step 5: Catalogue and Retro

- End each with a one-hour **cataloguing and retro workshop**
- Traditional retro, where we discuss what we went well, okay, and poorly
- Attendees at WhereBy.Us:
  - Team members who participated in user research
  - At least one point person from product
Retro (write: 5 min, discuss: 15 min)

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Discussion
- **Note**: Details. (initials)
Step 5: Catalogue and Retro

- Catalogue results in our user research database
Catalogue and retro: Local user research

- Some lessons learned
  - Wanted more interview participants and less survey data
  - Ran through many methods of finding participants, which took a lot of time--big learning experience
  - Got some good insights, but want to think more about how we’ll use them from the getgo

- Some good things!
  - Lots of good insights, and excess of survey data gave us tons of ideas for where to dig in next
  - Many hunches validated!
  - Made new connections with readers
So, what?
Outcomes of local user research project

On routines...
Test send times, re-send strategy to increase opens by ~18%

On content types...
Update recurring content sections in newsletters to increase opens, replies, clicks

On curiosity...
Experiment with curiosity more often in subject lines to increase opens

On building relationships...
Improve how we frame membership to readers to increase $$$ by ~28%
Enjoy some positive feedback! Motivation to go forth ❤❤❤

On our research process...
Make research questions more specific; Recruit less-engaged readers for interviews
Don’t let LARGE PROJECT fear be an excuse for not talking to readers

1. Read comments, replies, emails at a designated time in a group to identify trends
2. Ask readers a specific question for feedback every week — make it a feature
3. Publish a poll in your newsletter or on your website
4. Our user research workflow makes it easier than you’d expect to learn how to conduct user research + run these projects
Questions?
Resources
Stuff to read & tools to try

Public Google Drive with our User research templates

Medium: How we built a system to let our teams run their own user research projects

Medium: How we launched three member growth campaigns in two months

Medium: How we used a Jobs To Be Done framework to iterate on our newsletters

Miro for online, collaborative sticky notes