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Break free of limitations:

Doing more (and more reliable!) UX research with fewer resources

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INTRODUCTION

It's no secret that recent events have changed how UX research is conducted. It's an uneasy world on several fronts. UXRs want to know their work is valued and supported. Executives want to know the UX checks they sign off on are paying for worthwhile, trustworthy data (no thumbs on scales). UXRs want to do right for their organizations. That's not possible when there's too much work, too little headcount, regular pushback (or worse, inertia) from their constituents–and endless questions about the economy's future.

But UX teams that do what they've always done, to loosely quote Henry Ford, will always get what they've always gotten: anecdotal insights, long hours, eyestrain from editing videos when they employ the typical tools and methods they currently use.



A modest proposal: Doing things differently

There's a lot to admire about the precision and craft UXR practitioners apply to their work. But consider the evolution of books: When they were hand-lettered by scribes – three hours per page – ownership was limited to only the very wealthy or pious. Fast-forward through the Gutenberg press, past being typeset character slug by character slug, to digital printing that can output a one-off book in minutes. The revolutions here brought more information and enlightenment to more people quickly.

> **UX research is in need of its own modernization as well on two fronts: reputationally and procedurally.**

For UXRs wanting to increase their influence and their discipline's reputation at their company, is operating from a pure craftperson's bespoke perspective really the way to go about doing it? Does the artisan approach play in a world of KPIs and OKRs? That's like the driver of a Datsun B210 (75 horsepower) expecting to be the pace car for the rest of the highway. Sure, there's still a place for discernment and accuracy. But doing everything by hand like the abbott in a drafty monastery might be counterproductive.

On the procedural side, **UXRs need to cut themselves a break and decide where they truly need to exercise their talents and time.** Do they need to run every single evaluative study to measure the success of a digital experience's version 2.5.32.348? Probably not. Can they use the assistance of other, outside UX researchers to do the preliminary synthesis and setup? You bet. Should they be steering the ship on generative and formative studies that can help their organization break new ground and potentially gain more hearts, minds and wallets? Definitely, yes.

The current state of user research is in flux. For the better.

Companies of all sizes are recognizing the need to incorporate user research to make their products, designs and marketing more effective. In 2022, 94% of companies had at least one employee tasked with UX research.[1]

No longer is UX research the niche fringe team of data wonks on the hinterlands of daily operations with their labs and retinal tracking devices.The demands of the modern enterprise are dragging UX researchers out of their cozy nooks, blinking like groundhogs in the cold light of February 2.

On the surface, the world looks unwelcoming for these folks:

- Executive expectations are high for UX work to help improve the business
- Teams are already understaffed or miscategorized as “market research”
- There are too many jobs to be done, and many are beneath the experienced practitioner’s paygrade
- Too much will-it-or-won’t-it dithering about the economy leads to hiring freezes and UXR directors going to the mat like a MMA fighter to defend every dollar and line of their budgets

Changes in an organization’s employee rosters – whether voluntary or implemented – don’t just mean there aren’t enough UXRs to do the work. It also means the people asking the UXRs to do the studies in the first place might have disappeared halfway through that very same study. Those are hours and effort the UXR won’t get back.

[1]The State of User Research 2022 Report,
https://www.userinterviews.com/state-of-user-research-2022-report#anchor-insight-4

But do executives want too much?

For many executives, the last time they were face-to-face with user research was probably earlier in their careers: behind the two-way mirror in a focus group room snarking at the one outlier participant either dominating the conversation, or saying needy, performative things because they don't like to give bad news or they feel the need to earn that gift card.

It was exhausting for those future execs, and they haven't been back to watch a full session since. What they think now when they think about research from their C-suite view is that they:

- Need the high cost of creating something – a new product, design, or digital experience – to pay off in effectiveness and bottom-line metrics
- Can do the math per insight if eight supposed users hold sway over whether a $5 million initiative proceeds or not
- Can't have confidence in the research presented to them just because a UXR and heavily curated video highlight reel tells them to.

But this is the way things have always been done, they think. They do not realize there's a whole new world of tools and capabilities that would allow them to have the defensible proof and data that would help them de-risk new products that were built correctly from the get-go, and re-deploy resources and dev dollars more effectively.

Research needs to roll up into metrics. With so many more companies not just embracing, but elevating, the role of user research, comes the heightened expectation that user research be more measurable. The powers that be want to see:

- Anecdotal vs. statistical significance
- More accurate measurement and reliable comparisons
- Benchmarking against product and industry



Executives don't want to translate insights into KPIs. And frankly, UX researchers shouldn't want to open up their work to that potential misinterpretation either. **UX researchers can give their C-suite that validity – and keep their sanity – by re-examining their processes for delivering insights at scale.**

Typical tools alone can't deliver satisfaction

Most research organizations rely on both quantitative and qualitative research to first understand their audience and their needs, and then evaluate different solutions for them. However, the cost and time involved in doing both can be daunting.

Sure, outside consultants can be hired for this, but that can take months and more money than an enterprise would like to spend. And the difficulties of internal staff to meet demand for the projects requested of them has been previously discussed.

If the definition of insanity is doing the same thing over and over again and expecting a different result, it's no wonder UXRs are being driven crazy – through no fault of their own. **The evaluative research landscape isn't helping them nearly enough with its one-dimensional tools and methods.**

Video user testing (unmoderated)



Video user testing is the end-all be-all way these remote working days to actually "see" your audience interacting with your experience: every cringe, smile, pause, look of deep concentration. When you're trying to find the specific problem areas–where a user stalls, gets confused – it's a great tool. But this won't help you understand the overall response and effectiveness of your experience. Because it's anecdotal and based on what he or she says, not a collective. And it's time-consuming: every hour of video interview requires another four or five for analysis and curation. That works if you have a quick test or two. But if you're trying to build confidence in a design or experience, it's not enough.

Surveys



Depending on the experience being tested, developing new surveys or modifying existing ones can be time-consuming and introduce accidental bias, especially when written by inexperienced people doing research. Writing good surveys is a science best left to adept researchers. But that's only step one. Steps two and beyond require getting approvals, launching the survey, recruiting panel participants, cleansing data and analyzing the results. None of those are fast, easy, or optional.

Real "live" data

Nothing beats accuracy where live data is concerned but there are times when getting live data isn't possible or when you need to better understand the "why" for visitors' behavior. So, many researchers rely on:



Heat maps: These provide a data visualization that shows how users move, click and navigate a web page. Popular or "hot areas" are red, and the blue ones are less so. While these only show what a user did (not thought or felt), they're employed to understand how visitors behave on your site.



A/B testing: This stalwart method is best for comparison tasks: which option did better. There's hardly a better way to discern a clearcut winner . . . when you're testing a live site with an audience that generates enough traffic. But that requires development and deployment of these options — which means, again, you can't get away with prototypes or designs. You need (the time, the staff, the budget, etc) to build something out. And it only measures in retrospect: testing how the options did at one moment in time, not why one did better than the other. This works the best for binary yes/no issues around which is better - and not the why behind the numbers.

How research teams can do more with less

Limitations of typical tools or platforms aside, there are numerous ways for an intrepid UX team to excel, do good work, and tuck their kids into bed more often than not.

Prioritizing the most relevant problems or issues to solve. One of our customers, a UX director at a well-known online networking site, gets 100 requests for research studies every quarter. But even with a team of 55, they can only run ten. And that's with the best research-stack money can buy. So she says no, a lot. But saying no causes friction, which begs the question of democratization.

Democratizing evaluative research. Democratization – the practice of letting non-UX professionals conduct their own research – doesn't mean the inmates are taking over the asylum. Think of it more like dining out at a restaurant: sure, your server may take your order, recommend to you what's good on the menu, and make sure your needs are met. But your actual drinks and entree may get delivered by a busser. The busser doesn't need to have special knowledge of the daily specials or wine list: they just need to get your meal from the kitchen to your table. And the chef is still in the kitchen overseeing everything.

Democratizing research is not the same as handing over the practice of research



Chart inspired by @BEH_ZOD

Bringing the top brass along. For many executives, the last time they were face to face with user research was probably behind the two-way mirror in a focus group room. Zoom's made it easy for them to lurk; and if they're not already doing so, you need to invite them. If you're doing in-field ethnographic work, let them come along to watch and bring you coffee. Everything is theoretical until it's seen. Everything is a concept until you show them the proof. Everything is abstruse and assumed until you show them how it's actually done.

> A summarized study is a souvenir of your trip that they didn't go on.
> Give them a memory instead.

Training non-UX practitioners to do evaluative research. This is the option that involves the most upfront investment, for instance, internal company bootcamps, or third-party courses.

Embedding UX researchers in design, product development or digital teams. In hopes that cross-education and good research practices will rub off on others by example.

Employing more automated tools to do the work of studies that humans don't really need to do. Not every study requires in-person moderated feedback. Not every study is a seminal work that will upend the way your organization does business. Not every study needs the nuance of a consumer anthropologist's touch. What can be done with unmoderated video tests, or even templated surveys? A lot, actually.

Everyone and their mother has seen that Neilsen Norman statistic on needing 100 million user researchers by 2050. It seems highly unlikely 25% of the US population will be working in UX research–nor should they have to, frankly, with the increasing use of machine learning, automation and next-generation text processing which we'll bucket as AI.

AI can do the math the executives want. In addition to scoring, averaging, and ranking, AI can benchmark a study's results against other similar or competitive studies, products or industries to deliver more real-world metrics. Ten years ago, this would have been a tall order to ask for.



AI can recruit, manage and curate panels. AI can delve into panel databases, target demographics, email candidates, test respondents' validity, and swap out inauthentic respondents.

AI can free up the humans to do more visionary work. Again, not every study needs human UX expert oversight, or even human oversight. Humans can set the parameters, and set things in motion for the AI to run a study. The AI can collate insights for other humans to spot check. This makes it especially useful when the option of democratization is on the table.

AI can create visualizations of results. Every step of the process, AI can capture, record and make instantly gleanable things about an experience such as visitor mindset, likes and dislikes.

AI can deliver insights at scale. Automation allows more users to be reached at once. So insights that took hours to get and curate from a dozen humans can be done in mere minutes–and scaled 10x. Executives can't dither so much when they have that level of defensible response.

AI insights can be pre-checked by neutral humans. Machines do a good job, but they can't do the whole job. UX experts at a geographical and organizational distance can serve as a preliminary, purely neutral step to facilitate synthesis, storytelling and recommendations for the end stakeholder – serving almost like magical house-elves to help you focus more on the details of larger import.

Doing more with less isn't an option. It's a mandatory.

But it requires UX researchers–and the executives that need their insight–to reconsider their existing ways, do the self-examination of their practices and learnings to find better answers. That's evolution at work: of not just the craft, but the research maturity and market responsiveness of the business.

Embracing more technology in their practice-stack will make it possible for user researchers to **both** do more with less **and** actually increase the effectiveness, respect and influence that their work plays not only in product development and digital marketing–but helping direct the key themes that move their business forward.

> But fortune, as they say, favors the bold. Again, it goes back to that first question: If you do what you've always done, you're going to get what you've always gotten. In the case of UX researchers, is that still enough?



ABOUT WEVO

WEVO is a UX research platform that uncovers insights with significantly less effort than typical tools. Research, product and marketing teams get synthesized quantitative and qualitative insights, scores and benchmarks with less than 30 minutes of effort. WEVO's statistically significant feedback de-risks their decision-making, delivering the confidence to build valuable customer experiences. This is possible with WEVO's proprietary human-augmented AI: machine learning speeds and automates high-N insights gathering, while US-based UX analysts provide synthesis and storytelling parameters to facilitate your deeper examination.