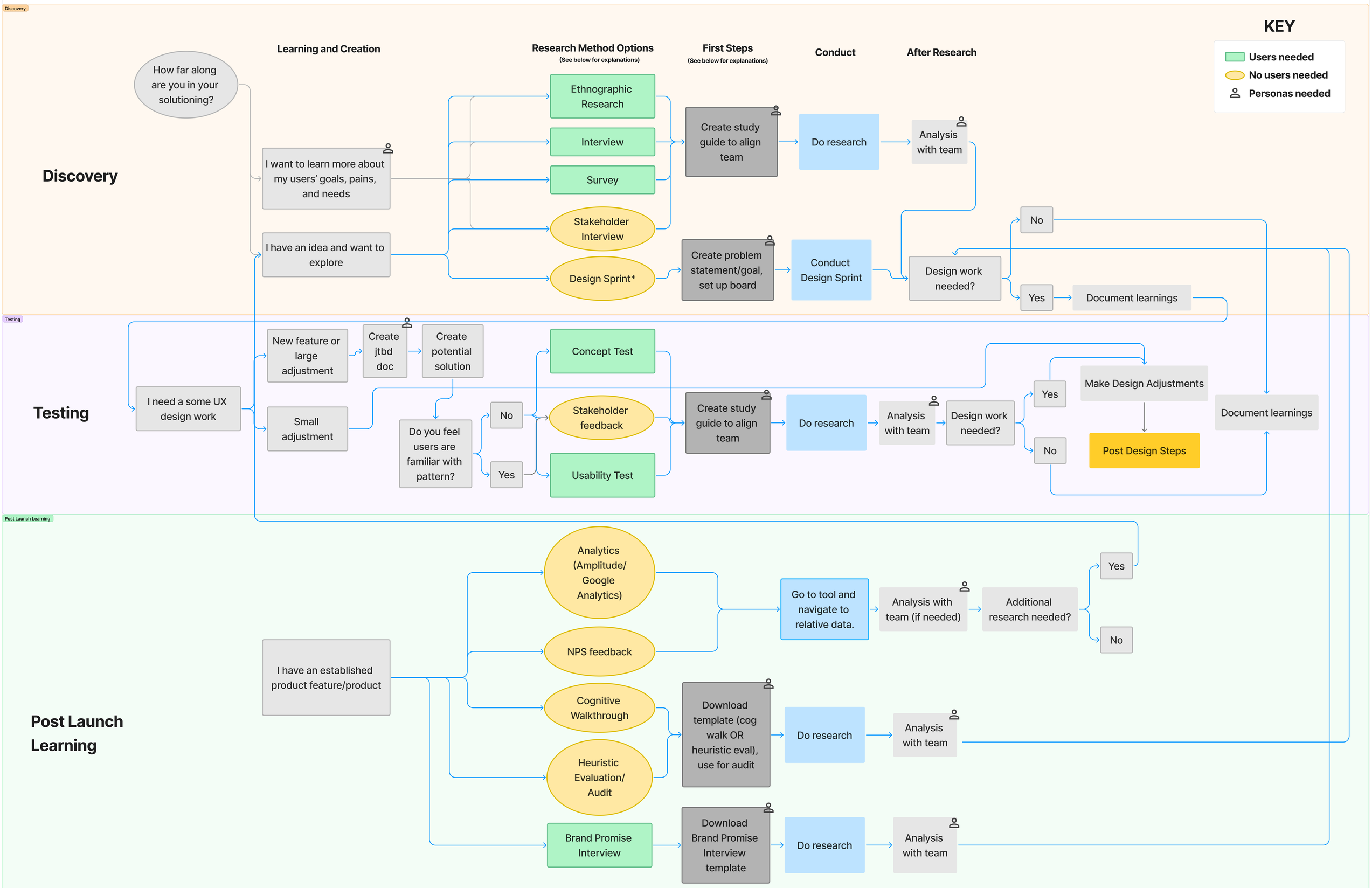
UX Situation Research Framework

Instructions and Disclaimer: The framework below aligns the various situations of product creation with possible research methods and design situation for us to build product features. Since sometimes it can be difficult to get end users to participate in B2B UX studies, we divided methods into ones that require end users and ones that do not require. These situations, nor the list of methods, are not exhaustive, but are the main ones we encounter.



*No users for internal workshop, but will need users after the first 4 stages for user testing purposes.

Research Method Explanations:

Users needed:

- **Brand Promise Interview:**
  - Goal: Learning directly from the Client, through a qualitative interview, how their experience of the product/service aligns with the organization's brand; learning any Gaps between the Brand Promise and what they are experiencing. Are we meeting the Client's expectation of value. Click here for additional explanation.
  - First step: Download the Brand Promise Interview template as a foundation to plan.
  - Degree of Effort: 8/10
  - Rough Completion Estimate: 1-4 weeks for 2-4 clients, depending on set up.
- **Concept Test:**
  - Goal: During early stages of product creation, when team has sketched a concept or has an idea to learn the value from the user or potential user's perspective, the team member can meet with 4-6 users or potential users for 1:1 sessions. Click here for additional explanation.
  - *First step*: Create a study guide to align team members on questions/subjects before starting concept tests.
  - Degree of Effort: 8/10
  - Rough Completion Estimate: 1-3 weeks
- **Ethnographic Research:**
  - Goal: This method involves learning directly from users where they are using the product or potentially using the product and using all your senses to understand what they experience. Good method for deep understanding of how and why users are doing what they are doing. Click here for additional explanation.
  - *First step*: Create a study guide to align team members before going into the field.
  - Rough Completion Estimate: 1-4 weeks, depending on planning and number of participants
- **Interview:**
  - Goal: Team member meets with a user or potential users and discusses topic(s) in depth. Click here for additional explanation.
  - First step: Create a study guide to align team members on questions/subjects before starting interviews.
  - Degree of Effort: 7/10
  - Rough Completion Estimate: 1-2 weeks
- **Survey:**
  - Goal: Usually used when we want to learn more about a subject from multiple users. Measure attitudes through a series of both open ended and close ended questions using a survey tool such as Survey Monkey or Medallia. Click here for additional explanation.
  - *First step*: Create a study guide to align team on research focus and main questions prior to starting in tool.
  - Degree of Effort: 7/10
  - Rough Completion Estimate: 1-3 weeks
- **Usability Test:**
  - Goal: During the design phase, when a new pattern is prototyped that may be unfamiliar to users, the team member can meet with 4-6 users or potential users for 1:1 sessions to understand initial learnability, usability, and general attitude toward the feature solution. Click here for additional explanation.
  - *First step*: Create a study guide to align team members on questions/subjects before starting interviews. Include tasks designed to simulate the intended use.
  - Degree of Effort: 8/10
  - Rough Completion Estimate: 1-3 weeks

Users not needed:

- **Analytics (Amplitude/Google Analytics):**
  - Goal: Amplitude and GA track where users navigate to and from, as well as how many users land on various pages, depending on how it was set up to track which interaction. Click here for additional information.
  - *First step*: Go to Amplitude and navigate to relative data to what you want to learn.
  - Degree of Effort: 5/10
  - Rough Completion Estimate: Few hours to learn site behavior
- **Cognitive Walkthrough:**
  - Goal: An audit exercise performed both as individuals and in groups. Method designed for first time use experience and relies on team walking through the experience perceived as a first time user, and asking themselves a series of questions. Team conducting should have variety of roles (ux, product, dev, etc) to offer various perspectives. Click here for additional explanation.
  - *First step*: Download template and use to conduct evaluation; decide which portion of site to evaluate and who are evaluators.
  - Degree of Effort: 7/10
  - Rough Completion Estimate: 1 week
- **Design Sprint*:**
  - Goal: Done in a team fashion usually internally, but sometimes with a client, the design sprint is a step by step timed process to discuss a problem statement and items that demonstrate this problems, create possible solutions to solve the problem, and vote in a democratic fashion to collectively determine the highest value solution to move forward. Prototyping and testing the concept solution that the team agrees should move forward usually occurs after the design sprint session.
  - *First step*: Work with team to create problem statement and goal of the design sprint. Here is the template.
  - Degree of Effort: 7/10
  - Rough Completion Estimate: 2-9 days from planning to execution
- **Heuristic Evaluation/Audit:**
  - Goal: A usability inspection method that relies on evaluators analyzing the user experience against a chosen set of heuristics, or broad rules. Goal is to work through the various heuristics to see how they align to the usability of the user experience. TreviPay created a system to rate level of attention of parts of UX. Click here for additional explanation.
  - *First step*: Download template and use to conduct evaluation; decide which portion of site to evaluate and who are evaluators.
  - Degree of Effort: 8/10
  - Rough Completion Estimate: 1 week
- **NPS Feedback:**
  - Goal: TreviPay continuously collects and houses the Net Performing Scores from customers and merchants, as well as comments and feedback about their scores, in Medallia and Echoes. Click here for more explanation.
  - *First step*: Go to Medallia and/or Echoes and navigate to data related to what you want to learn.
  - Degree of Effort: 5/10
  - Rough Completion Estimate: Few hours to move through customer comments
- **Stakeholder Feedback:**
  - Goal: Reviewing design solutions with one or more stakeholders in an informal setting to learn the perceived value that a user group may have.
  - *First step*: Create a simple study guide to align team and select key stakeholders.
  - Degree of Effort: 6/10
  - Rough Completion Estimate: .5 to 1 week, depending on stakeholders interviewed
- **Stakeholder Interview:**
  - Goal: Learning about a subject from the stakeholder Subject Matter Expert (SME). Usually 1:1, but can be in group form.
  - *First step*: Create a simple study guide to align team and select key stakeholders.
  - Degree of Effort: 6/10
  - Rough Completion Estimate: .5 to 1 week, depending on stakeholders interviewed

Document Definitions:

- **Study guide:** A document that helps guide the overall study, such as the goal, method of learning to be used, participants for the study, timeline, and main questions the team will ask the users. The purpose is to align the teams prior to starting research so all agree on goals and how goal is attained. Study guides have varying degrees of formality, depending on project, scope, timeline, and other variables.
- **JTBD Doc:** A document that aligns the team in organizing what the jtbd or the goal of the feature or product is to do for the user.