

Usability Tests

Usability testing is one of the most frequently used methodologies in UX research. Traditionally, a moderator asks participants to perform tasks, observes where they run into trouble or questions, and asks follow-up questions to understand their thought process. Usability tests can also be done without direct moderation and can be done in person or remotely. Usability tests can be done on any live site or piece of software, including competitors' products, or on a prototype of any fidelity.

Usability tests can be used to help you choose between design alternatives. They are also particularly effective for discovering issues that impede the experience.

Interviews

Interviewing is a widely used technique to gather qualitative information from participants. Just as it sounds, you sit down with participants and ask them open-ended questions about their needs, goals, and motivations. When possible, you interview them in the place where they would be actually interacting with whatever you plan to build and observe their natural behavior. This is referred to as an ethnographic interview or contextual inquiry. Ethnographic research is where you're able to visit users in the field rather than perform testing in a formal lab. However, you can also do interviews remotely.

Interviews are used to learn about different types of users and the way they behave and to gauge their outlook or impressions of specific items. Interviews are especially helpful in creating personas.

Card Sorts

Card sorts are a particular quantitative method used to help determine categorization and hierarchy when evaluating information architecture. There are two categories: open and closed. In an open card sort, you ask participants to categorize elements you need to organize into whatever groupings they think make sense and then label them. If you already have a set navigation or hierarchy, you give people the existing structure and ask them to place elements within the buckets. This is called a closed card sort. Once you have your navigation structure set, you can perform what's called a tree test, where you ask people to find particular elements using your navigation.

All these methods help you define and refine your organizational structure.

Eye Tracking

Eye tracking is a method where you utilize equipment that captures and analyzes where a person is looking. There is also technology that can capture and analyze the clicking and scrolling behaviors of users, which is usually referred to as click tracking or scroll tracking. These are especially useful for live websites, software, and applications, but you can also do click tests of nonlive designs. You get a true understanding of what actions users are taking without having to rely on their memory or ability to self report. However, this type of research cannot tell you why users are behaving a certain way.

Multivariate Testing

Multivariate testing is a method where you create several different versions of something and compare which one does the best job at hitting your goal. For instance, you may change a button to three different colors and see which gets the most sign-ups on a page. If you're only comparing two items, this is called an A/B test.

You always perform multivariate tests on live sites or products. You're always looking to optimize performance, whether that means creating the most clicks, conversions, signups, or other action.

Desirability Studies

Desirability studies allow you to ensure that your visuals match your brand goals and evoke the desired emotional response. There are several variations, but the most common is that you show participants the variations of visual designs and ask them to select which words best describe each. The list of words you give them is based on the words that best describe your brand goals and their opposites. You can then analyze which of the designs evokes the most positive associations.

Expert Reviews and Heuristic Analyses

Expert reviews, also sometimes called heuristic analyses, are detailed assessments of an interface, service, or product conducted by someone trained in current user experience best practices. The reviewer will compare the service or interface against the best practices and make recommendations to improve it based on those criteria. A traditional heuristic review requires several UX professionals to perform reviews and compare notes. Though in practice, there is usually only time for one person to perform such a detailed assessment, which is then usually called an expert review.

Expert reviews are typically a fast way to ensure that whatever you're building generally follows users' expectations and industry best practices. The only thing you need to get started is access to the interface you want to assess and a set of heuristics, or best practices.

Surveys

Surveys used in the UX research world are no different than other surveys; you craft a list of questions designed to gather certain facts or opinions from a targeted list of people. Many user experience professionals integrate various types of questions into surveys, such as text questions about demographics or first-click or desirability tests. You can quickly get data that is either quantitative or qualitative using surveys.

Diary Studies

Diary studies involve asking participants to record their behaviors or thoughts on a given topic at specific points over time, such as asking people to record each time they use a specific app. You can provide the same set of tasks or questions for them to adhere to at regular times (which is typically called a structured diary study) or just give them guidelines about how often they should be checking in. You can collect the data in any number of ways, from having participants take pictures to just sending email updates. Diary studies can be used for anything from understanding the context of how something is being used in real life to watching how behaviors change over time.

Personas

Personas are a tool that many UX researchers use to help them describe the different types of users that a company serves. UX professionals will perform a variety of research tactics to understand their key user bases and the main differences between their behaviors, goals, and identifying usage. For instance, if you're working on business expense tracking software, one persona might describe the usage of a frequent business traveler, and another may describe the financial officer who needs to approve all their reports. They are both users of the product but have very different contexts, usages, and goals. To create the personas, you need to pull data from your various research sources into a unified story about users' skills, goals, environments, key behaviors, and the context of your product in their life. You'll then refer to the personas as you make design decisions. You'll typically create a document that summarizes the persona's key attributes and you may even include a picture to represent your user.

Participatory Design Workshops

Participatory design workshops are collaboration sessions between users, designers, developers, and other business decision makers. The whole team will focus on creating solutions for a predefined problem, and there is immediate identification of user needs and issues, business considerations, and technical limitations. The tasks you perform in the design workshops might vary, but typically the only tools you'll need are writing utensils, paper, sticky notes, whiteboards, and a place for the whole team to gather.