When UX Teams Become Stage Designers: Emulating Field Research in the Usability Lab

A Case Study

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Planning and Executing the Study

Study Goals

The product team wanted to gain a broad understanding of:

- Tasks and activities their target audience performed with mobile devices.
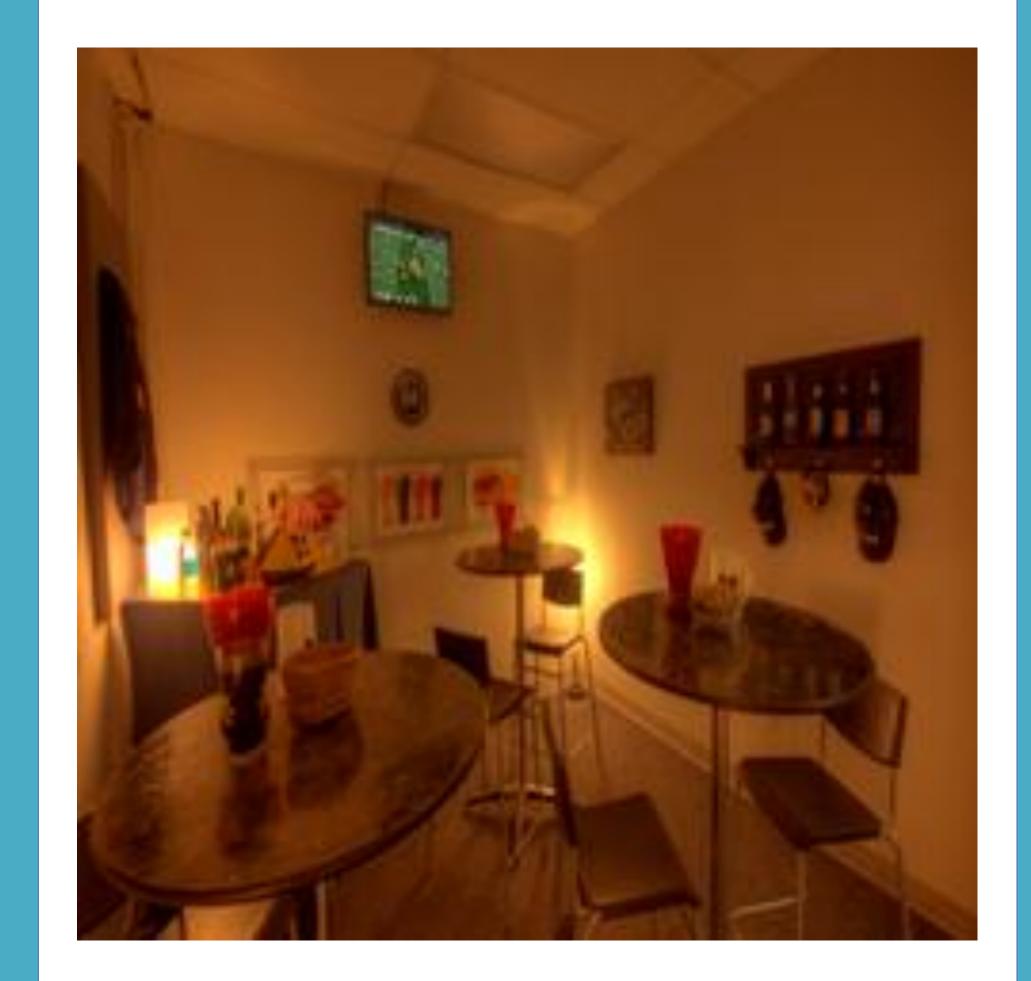- How those activities changed when users were in different settings.

The team wanted to learn about users' behavior at home, in the office, and in a public setting like a restaurant or sports bar. The ideal research methodology would have been to visit each participant three times, or to spend a day following each participant while s/he moved among the three settings.

Research Design Challenges

There was no budget to use classic field research methodology, nor did the calendar permit it. Schedule constraints allowed only two weeks for the entire study—planning, execution, and data compilation.

We could recruit ten people from the target audience to spend an hour in our usability lab. We couldn't spend additional recruiting time to schedule lengthy field visits, nor the time to make the visits.

What could we do? First we designed a simple interview protocol, asking participants to imagine they were at home, then at the office, and finally at a restaurant. It helped that the participants could use their own mobile devices during the inter-views. But this approach wasn't good enough.

- We wanted to ground the participant more physically and contextually in each of the environments.
- We wanted to provide visual and kinesthetic cues, so that responses to our interview questions about the locations would be as realistic as possible.
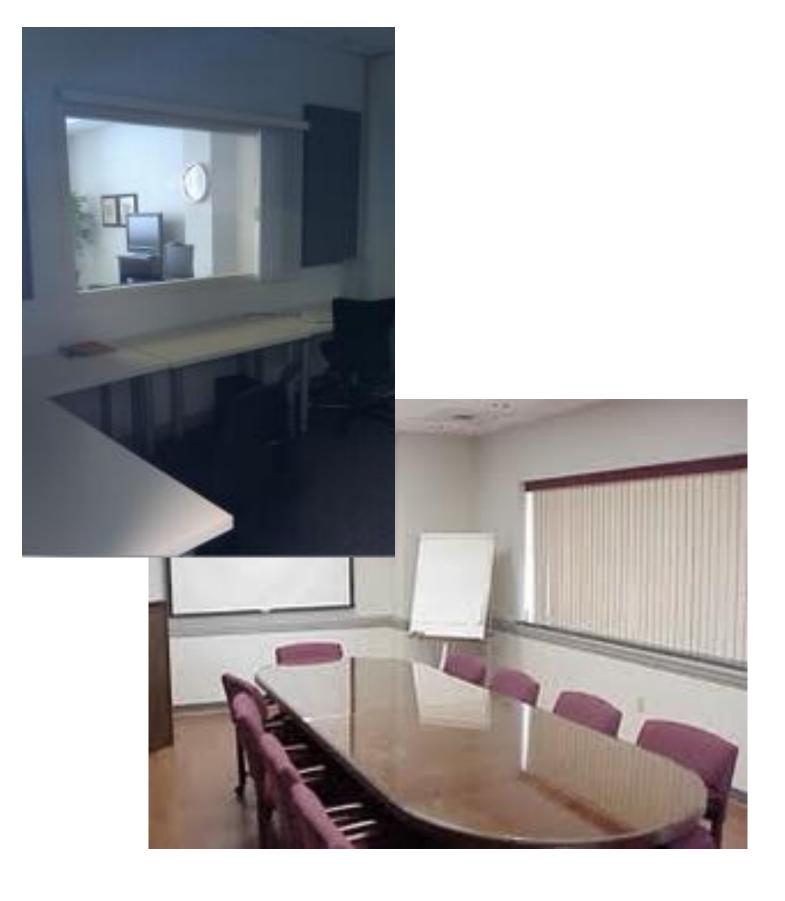
The Solution

We turned our usability lab and observation room into the three desired environments. We divided the lab into two rooms with screens—one area became the home and the other the office.

- The home environment was a living room, with reclining chair, coffee table, and large-screen TV.
- The office environment was a typical office cubicle, with computer and whiteboard.

Our observation room became the "Go Blue Bar & Grill" - our pièce de résistance, in honor of our University of Michigan locale.

The result was well worth the considerable effort. Participants behaved in ways we don't usually see in the lab, and gave us confidence that we were collecting similar data to actual ethnographic interviews in real settings.

Schedule and Resource Issues

Setting up the three environments took more time than we anticipated. We compensated by adding more resources.

- Our recruiter normally also gets the usability lab ready for a study; in this case, there was not time for her to perform both responsibilities. Instead, a senior staff member with interior design savvy devoted two long weekend days to the stage settings, plus two days with our recruiter.
- In addition to the time needed for the stage settings, the methodology itself required more resources. We had initially planned for our researcher/moderator to do his own note-taking. However, note-taking by the moderator made him less responsive and less able to conduct a true dialogue with the participants in the stage settings. So we added an observer/note-taker to the project team, just as we would in a real field study.

Tips and Techniques

1. Don't try to do it in two weeks! Despite a highly experienced UX team and wonderful support staff, this was a stressful project. A four-week schedule is more realistic, as shown in the timeline below.

2. Follow field research methodology as much as possible. A two-person team is necessary for the moderator to do a top-quality job, even though you're physically in the usability lab.

3. Assign a team member with visual design experience to create the stage settings. Our stage designer had experience in interior design, as well as some background in set design.

4. Don't over-promise; stage settings don't replace actual field research. We believe this methodology yielded considerably richer and more valuable data than we would have gotten from "plain-vanilla" interviews.

5. But we don't know how much more we would have learned if we had done true contextual inquiry. If you can get the time and budget, go into the field!

Observation Room and Usability Lab/Conference Room - "before" transformation

Room Settings

Top: "Go Blue Bar & Grill"
Middle: Living Room
Bottom: Office

Recommended Project Timeline

	Week One	Week Two	Week Three	Week Four
Project Lead	Research Design	Research Protocol	Pilot / Sessions	Draft Results Report
Recruiter		Participant Screener / Recruiting		
Set Designer	Plan Set Designs	Source Materials / Setup		
Observer/ Note Taker/ Editor	Research Design Review	Screener Review / Protocol Review	Sessions	Edit Results Report

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