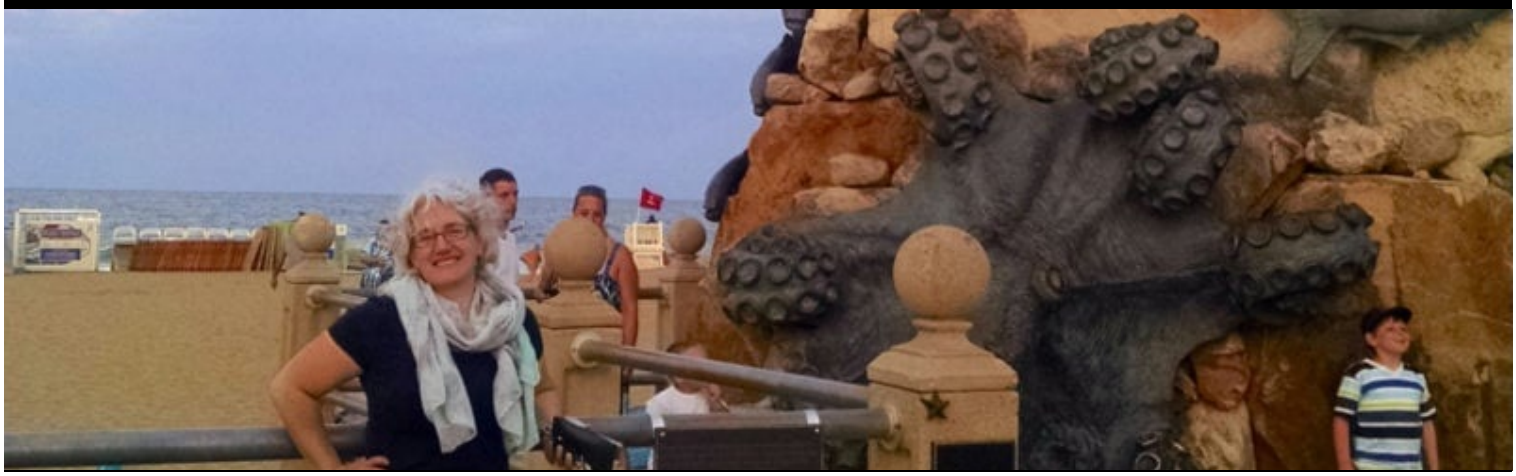
blink



By

Roxane Neal

It was a Tuesday at 11:00 am and we just got off a kickoff call with a new client. We stared at each other and knew what had to happen: I needed to be on a plane the next day to cross the country to conduct customer interviews on Thursday.

This recent scenario happened when we engaged with a new client on a project with a quick turnaround. We needed to provide our client with evidence-driven, modern designs for a customer relationship management (CRM) system within ten days. They called upon Blink UX to help them save an important project.

In just five days I managed to get to our client's customer site, conduct interviews, and share findings that allowed our design team to create an entirely new interaction model for the CRM. Such a rush project risked misunderstandings, wasting precious time, unrealistic expectations, and strained client relations. But we managed to avoid those pitfalls in this mad dash. What exactly made this research successful?

Here are 10 tips to keep in mind when you're asked to turn around field research in just a few days.

1. Be clear on research and design goals

In the Tuesday kickoff we asked our client, "What do you intend to do with our designs?" Were they for developers to implement? Were they for conveying a vision to executives? We learned it was the latter: Our client needed to convince their customer they were improving the CRM system. Blink was needed to envision the basic interaction design. To leave more time for design, we suggested we could inform design with a cognitive walkthrough and heuristic analysis. However our client wanted the credibility of onsite interviews with the end users. Boots on the ground it was then.

2. Train on your equipment

Blink UX conducts a lot of field research and is well equipped with recording equipment packed ready for travel. By 1:30 pm Tuesday I was getting a tutorial on the camcorder, battery packs, microphone, and audio. I was outfitted with large and small tripods, chargers, USB cables, and extra memory cards. This training was critical since this was the first time I'd used these particular models.

Make time to try out your gear on your own, at least the night before even if you get in late. By knowing your equipment well you won't run the risk of losing footage or delaying sessions.

3. Always be ready for business travel

It's a good idea to always be ready for field research opportunities. A few months prior I had prepared a travel checklist inspired by guidance at One Bag: The Art & Science of Traveling Light. Tuesday night I confidently packed, thanks to the list.

4. Squeeze in a system review before writing a session guide

Gaining more familiarity with our client's CRM system was critical to writing the interview guide and entering into the site visits, so I scheduled a 7:30 am Wednesday morning walkthrough knowing I had to leave for the airport in an hour. The client's business analyst, the online site manager, and our main client contact all attended the online meeting. The clients also sent us UI specification documents to further explain the system.

Want to know an advantage of using video in a web conference with new clients? You can recognize each other when you meet in person.

5. Prepare the interview guide wherever you can and don't stress about perfection

I only had my travel day to write the interview guide. This meant that

- I wouldn't have much time to polish the guide before handing it off to the client,
- I'll never know the product well enough to write a well-informed, deeply insightful, specific set of interview questions,
- I wouldn't have much time to iterate with client feedback.

I put my perfectionist tendencies aside. I wrote the research goals and interview questions at the airport and on my first flight so I could email it at my layover. My attitude when I emailed it between flights was that this was a good set of questions considering I just learned of the system 32 hours ago and we were interviewing in about 12 hours. I was confident that we would get good data even if we didn't have time for major revisions. I knew that to properly inform the Blink designer, I needed to understand the sales staff's goals, information priorities, and main tasks. The interview guide and email sought to clarify the client priorities, key to juggling multiple interview questions.

6. Stay healthy

You can't get the work done if you get sick. Sometimes you need vitamins and supplements to be at your best on short notice. My purchase of Zicam in the Minneapolis airport was worth the $20.

You know sleep is critical to staying healthy. If you get to the hotel late like I did and aren't feeling prepared yet, try to focus on settling down rather than continue working. You may need to use a bit of those wee hours to do a time-boxed preparation so you don't worry, like test the camera equipment, but don't stay up all night writing or emailing. Also try not to let the pressure to get a good night's sleep make you anxious. My tricks for settling down are herbal tea, a warm shower, and reading. When I REALLY need to go to sleep I turn to my iSleep Easy app by Meditation Oasis.

6. Communicate observer expectations

In user interviews where the client is present, I set expectations by saying "I like to ask my questions and then give you the last five or ten minutes to ask yours." Then I see how the client reacts to it. My new clients readily agreed, demonstrating respect for our process. That allowed me 50 minutes to ask the questions I needed and them the opportunity to dive into their goals and tool expertise.

7. Have a backup recording device

In field research we bring a backup audio recorder in case the camcorder encounters a problem. I had to use the audio recorder in my second and third sessions when I discovered the camcorder shut off.

8. Build in check-ins and breaks to the session schedule

When interviewing, especially in a domain with unfamiliar terminology or with equipment you're new to, it's important to have a break to rework what's not working or to ask clarifying questions from the subject matter experts. We made a reasonable schedule of three short sessions, a lunch break, two sessions, a break, one final session on Thursday, and a final session the next day on Friday. Those breaks were critical for figuring out equipment problems, reviewing notes, clarifying terminology, and rejuvenating. Ideally you get a break after your first session, like any pilot session in user research, but if the schedule doesn't allow, make the best of those first sessions as gracefully as you can.

9. Get to know your clients

When working with any new people, you have the challenge of building trust and learning your colleagues' communication style. Socializing with your business colleagues in a relaxed way goes a long way to building trust and understanding, My main client and I had Thursday evening free so we decided to dine together in Virginia Beach. I could have spent all evening talking about the project or trying to sell him on Blink, but I much preferred talking about his travels and backpacking trips. I felt more confident in our communications then on.

10. Write findings only to the extent available in the remaining time

My job was to provide the user research to inform the redesign of the CRM system for this particular sales team. I focused my summary and wrote three particular sections about the team:

- How they work
- What's important
- Pain points

I had a short list of overarching usability feedback but did not make an exhaustive accounting of the issues. I needed to write up findings from the eight sales interviews and I started Friday afternoon. Ideally I would have finished those five pages on the plane home Friday but I did require a couple of hours on my Saturday to get 'er done. The client team reviewed it over the weekend and we were ready to discuss next steps for design Monday morning.

These are tips I used or learned, but I must give credit to our clients. We got to work with very committed, smart, professional people. For example, a critical step in the research's success was the proactivity of our client's onsite engineering manager. He called me less than an hour after the kickoff meeting to understand how he could help. He took on scheduling their customers' sales staff and he even offered me hotel suggestions.

The next time you are faced with demands for quick research, know that you can do it. Sometimes you just have to be scrappy to get things done quickly and if you're prepared, communicate clearly, use time wisely, and stay healthy, you can get it done.

Have fun!

> *Roxane is a seasoned user researcher with a warm place in her heart for enterprise applications and the good folks who have to use them. She had not been to Virginia before this trip though will head back someday to visit historic Jamestown.*