The Lean, Mean Usability Machine (or How We Are Bringing Rapid Research Methods to Our Agile Teams)

Figure 1. Usability Bob on the job

Our Digital Experience and eCommerce teams have grown and evolved since I first started working at Liberty Mutual in 2008. When I was hired, my job title was "Principal Systems Analyst" and I worked in IT. I started at "UX zero." Our company did not have a job title for UX hires. It did not have a dedicated UX team to put them in. We had no other UX researchers. We had no in-house information architects. We had one writer and one designer, who were both contractors.

In my first month on the job at Liberty Mutual, my boss gave me a nickname, "Usability Bob." The name stuck for a while, and (1) helped increase the **visibility** of UX research within Liberty Mutual and (2) helped establish a UX research **strategy**. I would describe that strategy **philosophically** as understanding our customers' needs and being empathetic, because it can be argued an insurance company's most important service is preparing customers before disasters strike and its response to customers when they do strike. I would describe that UX strategy **pragmatically** as "test early and often."

Traditional UX Research Methods

Figure 2. In a traditional qualitative usability study, a participant is completing task-based scenarios with a moderator

Over the years, we have done a lot of **qualitative** usability research, using "think-aloud" protocols. We bring in a recruited participant (a non-Liberty Mutual employee) to a conference room in our downtown Boston office, and we moderate a session using task-based scenarios. An example of a scenario is, "Imagine you have just bought a new car and are interested in insuring it. Please show me how you would proceed from this page [home page of libertymutual.com]." The think-aloud protocol works exactly as it sounds: we ask people to think out loud, telling us what is working well for them and where the pain points are. Typically, these studies take 45 to 60 minutes and involve 10-12 participants.

We also do **quantitative** usability research using third-party software like UserZoom and Validately. These remote, unmoderated (automated) studies typically take 10-20 minutes and involve anywhere from 10-250 participants.

Both methods have their pros and cons. I like **qualitative** research, because while a quantitative study can tell you what happens, a qualitative usability study can tell you **why** it happens. Your participants are thinking out loud and telling you why something works, or it does not work. You are **watching and studying users**.

Time for a Traditional UX Study: 4-5 Weeks
Traditional UX methods take time. We are looking at a total of a 4-5-week turnaround for a traditional usability study:

- **2 weeks**: Recruiting participants, based on a 20-question screener, and preparing for the usability test

- **1 week**: Running the usability sessions with 10-12 participants

- **1-2 weeks**: Analyzing the results and preparing a PowerPoint readout

We knew 4-5 weeks was not going to work in Agile.

Lean UX Research Methodologies for Our Agile Teams

Figure 3. Affinity diagramming involves taking observations and grouping them into categories, then labeling those categories

Our User Experience Research team has been incorporating new usability testing methods, so we can better meet the needs of our Agile team. We have been fine tuning our approach so that, with the Agile teams, we can focus on the actual experience being designed, not the deliverables.

In traditional usability testing, these deliverables have largely been in the form of what User Experience Advocate Steve Krug calls the "big honking report," a readout complete with participant demographics, lists of tasks, major and minor findings, conclusions, and video clips of participants succeeding or failing with a particular site or app. We still write these reports – and we upload them to our Usability Wiki. But compiling these reports takes time. And taking the time to write a report is not in the best interests of an Agile process.

In fact, the Agile Manifesto prefers "working software over comprehensive documentation" (http://agilemanifesto.org/). Agile seeks to minimize waste. Taking this to its extreme, all documentation – including a usability readout – is waste. That does not mean we should get rid of all documentation, but it does suggest that we should try to communicate UX results with the least amount of documentation possible.

To that end, we are evolving our traditional UX research methods and making them leaner and meaner (well, leaner anyway). We are keeping in mind these principles: valuing individuals and interactions over processes and tools, working software over comprehensive documentation, and responding to change over following a plan. And these are all principles of the Agile manifesto.
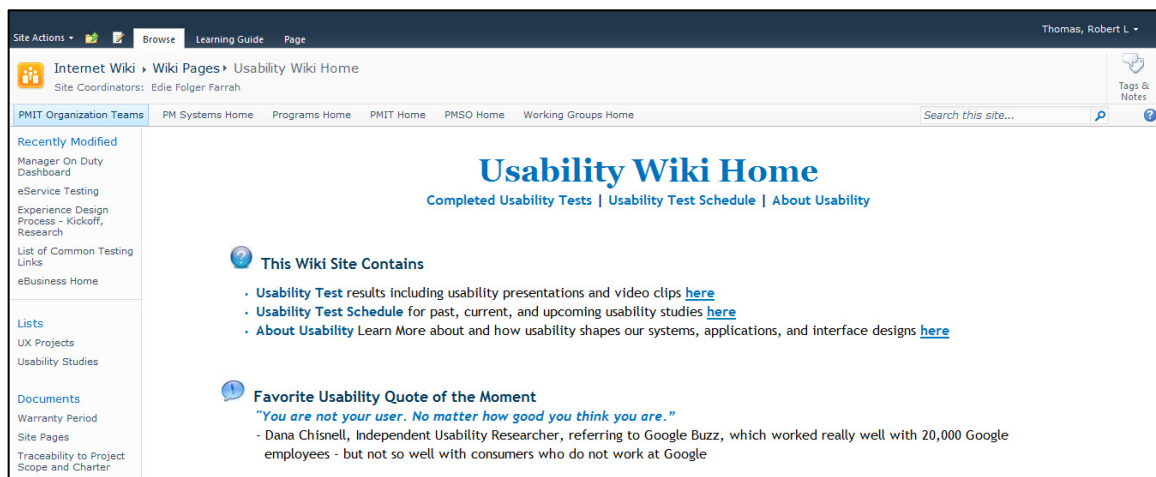

Figure 4. Usability Wiki, SharePoint Site

Time for a Lean UX Study: 7-14 Days

Our goal is to collaborate. We want to help the Agile teams rapidly test out design ideas, validate or invalidate them with real users, and share UX insights much earlier in the process. In our new lean methodology, we are now measuring time in days instead of weeks, and looking at a 7-14-day turnaround:

- **5-10 days**: Recruiting participants, based on a standardized 5-10 question screener, and preparing for the usability test

- **1-2 days**: Running the usability sessions with 5-10 participants. Stakeholders from the Agile team observe these usability sessions in real time in another observation room, with a UX team member facilitating *

- **1 day**: Running a "Find the Problems" collaboration session with our UX team and the same stakeholders from the Agile team who observed the usability tests. In this collaboration session, we:

- o Take the observations (Post-It Notes) and group them into categories
- o Label each of those categories
- o Vote for which categories are the most important (highest priority)
- o Identify the general and specific problems in each of those categories, starting with the highest priority

- **1 day**: Running a follow-up "Find the Solutions" collaboration session that identifies and works out fixes for the problems found in the usability tests

* During these observation sessions, each stakeholder writes single observations on Post-It Notes, and then selects their top 3 observations to put into the final pile.

Conclusion

No matter the methodology, our UX strategy is still the same. We want to test early and often so we can understand whether or not we are meeting our customers' needs.

But I want to leave you with one last thought. In his presentation "Beyond the UX Tipping Point," UX Advocate Jared Spool states that a "UX-infused" organization can only succeed, first of all, by **watching and studying users**. I would argue that for our Agile teams to succeed, they will also need to watch and study users. We all are busy and have a lot to accomplish, but if we do not watch and study users, then we are relegating ourselves to building user experiences based on subjective opinion.