AnswerLab's Guide to Remote Research

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Call to Remote Research

As Covid-19 (the latest coronavirus strain) grows into a global epidemic, now is the time for urgent, bold, and thoughtful response plans from companies across the world.

UX Research teams and other qualitative-focused research companies need to shift business strategy now. We have a moral obligation to define our role in minimizing transmission of the virus.

We're asking all qualitative researchers to share our short-term commitment to remote research. The more we each do our part to minimize the spread of the virus, the more we support the health of humans across the globe and the long-term financial stability of all.

To support you, we created our Guide to Remote Research. AnswerLab has been conducting remote research for 15+ years—it's a part of our DNA. And **we've collected our best tips in this guide, including:**

- **Best practices for remote research**
- **Advice on creating a virtual best place to work**
- **Our favorite tools for successful remote research**

In this uncertain time, it's easy to fall behind, postponing research due to barriers caused by working from home and social distancing. By switching to remote, you'll keep uncovering insights and continue collaborating so you can ensure your products meet financial goals when they're under increasing pressure to succeed.

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The basics of remote research

Remote research is a reliable and scalable way to get the insights you need to evaluate and improve user experience. There are a number of benefits to conducting studies remotely, including:

- access to a wider pool of participants
- reaching participants who can't get to a physical lab
- connecting with participants in their natural surroundings
- testing on a wider range of real-world devices and platforms in context

With a few modifications, many methodologies can be converted to remote research using a wealth of tools and platforms from video conferencing to task specific tools for cardsorting or storyboarding to digital diary platforms. Flexibility and creative solutions can convert methods like in-depth interviews, mobile testing, focus groups, and even participatory design sessions. We've even had success conducting 'in-homes' remotely.

However, there are also situations where remote research is difficult. You might have to reframe your research questions or adjust your approach to get the feedback you need. If you're unsure how to conduct your study remotely, consider pivoting research to uncover user wants and needs, identify potential gaps, and gather feedback on an idea or interaction. Other methods to consider include quantitative testing, heuristics, diary studies, literature reviews, and more.

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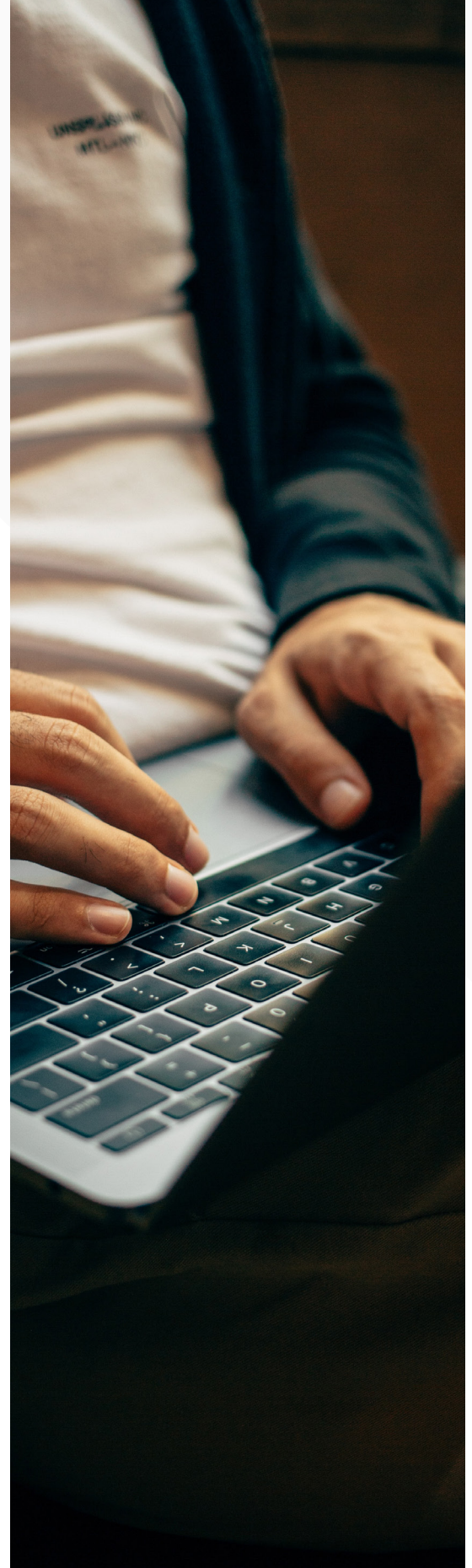
In general, we recommend the following applications for remote research:

Understanding current workflow

Remote sessions are perfect to get a sense of a participant's current process and experience with your product, helping teams identify pain points and moments of satisfaction. This face to face interaction (we recommend webcams) allows participants to share their screen and artifacts to show their current process, and gives researchers the opportunity to probe on areas of delight and challenge.

Testing a live website or app

Remote research allows for testing on both desktop and mobile devices via video conference to evaluate live websites and apps. Participants can share their screen so the researcher can observe behavior in real-time. Using webcams builds rapport and allows for observation of nonverbal reactions. Some AR/VR experiences can even be tested remotely with interviews conducted in virtual reality.

Getting user feedback on a prototype or concept

Remote research can be used successfully for prototypes, concepts, and whitelisted experiences on both desktop and mobile. Stimuli can include all sorts of experiences, such as a linked InVision prototype, static mockups, or even a video of a dynamic experience. To protect sensitive information, ensure you (or your research partner) have policies and strategies in place to keep your prototypes secure.

Exploring the big picture and uncovering user wants and needs

Surprisingly, you can conduct a number of methods remotely that people think you can only do in-person, for example, exploratory research, focus groups, and co-creation. By shifting these to remote, you'll continue building your understanding of your users and planning how best to meet their needs even during these challenging times.

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How to successfully transition in-person to remote research

There are a number of ways to ensure remote research is a success, especially if you originally planned to conduct the research in person.

Consider each of these elements:

Research Goals:
- Examine your goals and reframe questions to ensure you get useful feedback. For example, focus on gathering user feedback on an idea or interaction vs. interactions which require an in-person element (i.e. tapping behavior).
- If you're conducting research on mobile devices, review research questions to assess what remote capabilities are necessary. Remote mobile testing is not a good fit for projects that require confidential prototypes that can't be hosted via a URL, data collection on gestures and interactions, and simultaneous screen recordings and video recordings of participants.

Participants:
- Review your recruiting criteria to determine whether your current recruits are able to participate in remote sessions. You may need to rescreen participants to ensure they meet the minimum device or OS version needed for remote sessions using your selected software.
- When preparing participants for remote research, share information like software to download in advance and expectations for webcam use prior to sessions.

Stimuli:
- Plan for remote-friendly stimuli or artifacts like an existing website or app, a live experience you can whitelist participants into, a prototype link, static mockups, or a video of a dynamic experience.

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- Review any prototypes to determine how to best share them. For example, via your screen share, as a short video, or through an InVision link.
- Invite stakeholders to a remote practice session so everyone can see how the prototypes will appear to the participant. Make adjustments as needed.

Flexibility:

Remote research during unusual circumstances, like the coronavirus outbreak, has added complexities. People's habits, behaviors, and environments may be different during times of extenuating circumstances. For example, knowledge workers used to working from offices are moving to remote work, schools are closing, and individuals are taking various self-quarantine measures.

- Set expectations and check in with stakeholders and team members often. Frequent reassurance of common goals, acknowledgement of people's needs, and a willingness to be flexible will smooth the path to getting insights.
- During sessions, remind participants to let you know if they need to take a break.
- Schedule more time than usual between sessions to allow buffer if a session runs over.

Create an engaging observation experience for stakeholders

Research sessions aren't just about collecting data. Teams benefit from the interaction, collaboration, and realizations that happen when observing as a group in the back room. When shifting research to be conducted remotely, it's important to maintain stakeholder energy, communication, and engagement to help maximize the impact of your study.

How to create an engaging back room experience for remote observers:

Maintain open lines of communication

To create the 'back room' experience during remote sessions, invite all team members to join remotely via video conferencing platforms. Decide in advance on a way for observers to communicate with you (e.g., text, email, Slack, etc.).

Debrief throughout the day to build alignment

When remote, you can't pop into the back room organically. Plan for and schedule check-in points. You can use this time to capture back room observations and findings while they're fresh and keep observers engaged and energized. Check out our article on observation room strategies for a number of approaches you can easily adapt for remote settings.

Create a digital collaboration space

Digital whiteboard tools can provide a way for stakeholders to capture and synthesize what they're hearing during sessions.

End the day thoughtfully

A checkpoint at the end of the day helps to keep people engaged - a brief email keeps stakeholders in the loop and maintains enthusiasm for the research. Alternatively, an end of day debrief video conference allows for conversation and can increase team cohesion.

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Beyond the Research

Advice on creating a virtual best place to work

Many people are suddenly finding themselves in unplanned work from home situations. To stay on track and meet business commitments, teams need to continue conducting meetings, making decisions, and staying focused. But navigating remote work, from daily communication to meetings and collaborative projects, often takes trial and error. Over the years, we've developed some best practices to share.

In this section, we'll provide tips on:
- Building a remote team
- Hosting workshops, meetings, and collaboration remotely

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Building a remote team

At AnswerLab, over 70% of our team is entirely remote. With team members across the country, we understand how to build culture remotely across teams. When you're working on a remote team, it's harder to have those impromptu conversations that happen in the hallway or over lunch when you're in a physical office. So work culture must find its way into online channels, which requires more intentionality than when creating culture for the in-office experience.

The critical components to effective remote teams are trust and communication. But the most important elements to AnswerLab's foundation are knowing expectations and knowing the resources available to help you meet those expectations.

Tips and Tricks

- Slack is a great tool for quick collaboration amongst a remote team. We use Slack channels on research topics and methods to foster mentorship and peer assistance, and on more community-based topics like pets, books, or cooking to encourage team-building.

- We've found using memes to get people excited about upcoming tasks like providing feedback on deliverables or research plans can be a great mechanism for bringing the levity and camaraderie that comes from in-person interactions.

- Tools are everything when it comes to remote work. At AnswerLab, we use several tools and softwares that help us collaborate, share resources, and work more efficiently as a team. Test out different tools and resources to see what works best for your organization.

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Hosting workshops, meetings, and collaboration remotely

The most important outcome of remote workshops is productive, focused results delivered safely during the current pandemic. We've all seen the power of synthesizing insights as a team following research studies, and continuing to do this remotely can have huge benefits for your team. It can be easy to fall behind due to transitions to remote work, but it's critical to keep collaboration and productivity moving during this time.

A few benefits of remote meetings:

- Remote workshops can be less time consuming for your employees
- Gathering employees in their natural surroundings means they'll be more relaxed in the comfort of their own homes
- By conducting remote meetings, you'll offer flexible access to individuals and teams, therefore involving more people involved in the collaborative process
- You'll receive immediate recordings of proceedings, materials, media, and collaboration, so it's easier to share with employees who could not make the original meeting

You don't need to give up or delay your important workshops, meetings, or planning sessions. One of the main challenges is keeping people focused and engaged, as it's easy to multi-task and get distracted.

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Tips and Tricks

- Consider pre-work or pre-reading so attendees come prepared to discuss next steps rather than give status updates
- Contact attendees ahead of time as needed to ask for individual commitments
- Flex session times, duration, breaks, and content to fit workers' schedules
- Do quick intros of key tech and platform functions to make sure everyone is comfortable with the set-up
- If facilitating, reflect and report out frequently to keep everyone on track and focused
- Have a co-facilitator ready to take notes and document learnings, so the moderator can focus on the group interactions
- Pair participants up to brainstorm, create recommendations, identify issues for discussions, and share personal experiences

At the end of the day, open communication channels and clear expectations make for effective remote teams.

A successfully engaged remote team ensures high-quality collaborative work regardless of location, and employs tools to foster internal communication and connection. Community building needs to be an essential and very intentional part of your organizational culture, especially in the absense of a physical office setting. You have to create ways to foster real human connections.

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Tools and Resources

There are many tools out there, and you can and should work with the tools already available to you. That said, these are some of our favorites:

dscout - a flexible platform for remote research and participant recruiting. dscout Live provides moderated interviewing on desktop and mobile; dscout Diary collects multimedia, in-context data across numerous unmoderated user touch points.

Miro - a digital workspace, this tool is useful for research session debriefs, remote whiteboarding, and collaboration.

Optimal Workshop - not only are these elegant card sorting and tree testing tools, they also come in handy for remote participatory design activities.

Qualboard - one of the tools our team uses for managing communities and running remote focus groups.

Qualtrics - a powerful online survey tool for building and distributing surveys, and analyzing responses

Reduct.Video - Video is the most impactful way to share research findings. Reduct makes it a breeze to quickly search hours of recordings, highlight and tag themes, and put together highlight reels to present findings in mere minutes.

Userlytics - allows for unmoderated remote research. A researcher is able to set up tasks for participants to complete on their own schedule.

Zoom - Easy to use video conferencing platform with features that make it a great tool not only for general meetings but also remote moderated sessions and focus groups.

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Need help with your remote research?

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About AnswerLab

answerlab.com

New York, NY • San Francisco, CA

AnswerLab delivers trusted customer insights that help the world's leading brands create experiences people love. We focus exclusively on user experience research to understand what people see, do, think, and feel when using voice interfaces, AR/VR, websites, mobile applications, wearables, and other digital products.

Through thousands of research engagements, we build strategic partnerships that help clients scale their UX impact year over year. To answer your toughest research questions, we employ a mix of techniques, methodologies, and best practices tailored to provide clear, actionable recommendations that generate strategic business results.

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