# User research toolkit

# for PHSA websites and POD

**Websites are for people trying to do tasks.** Learning about your users and defining your objectives will help you create better webpages.

**When should you use this toolkit?** Before creating any major changes to your content, launching a new website or if you want to see if your content is meeting the needs of your users.

**Our process will give you the resources to carry out user testing easily and efficiently.**

1. Learn about the process.
2. Fill out your worksheet.
3. Find out about different types of user testing.
4. Make your webpages more helpful for your users.

# The process

All web projects, testing and consultants must be approved by PHSA Communications (see [policy COM 150](http://2pod.phsa.ca/workplace-resources/policies-procedures/_layouts/15/WopiFrame.aspx?sourcedoc=/workplace-resources/policies-procedures/acrossPhsa/C-99-11-20105.docx&action=default&DefaultItemOpen=1)). Talk to the [communications contact for your program](http://2pod.phsa.ca/our-phsa/browse-by-department/Pages/Communications.aspx) before starting any projects.

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| **#1 Learn & plan** |  |
| **Your tasks**   * Keep an open mind. Don’t make any assumptions about your users, their needs or current issues. * Read this toolkit and learn about the different types of web testing. * Fill out the worksheet (next page) and define your project purpose, audiences and resources. |  |
| **#2 Draft & collaborate** |  |
| **Your tasks**   * Email the filled-out worksheet (next page) to the web strategy team at [webhelp@phsa.ca](mailto:webhelp@phsa.ca). * Create first draft of scenarios or questions for focus groups or online testing. * Review your web analytics using the [PHSA Google Analytics resources](http://our.healthbc.org/sites/google-analytics-phsa/SitePages/Home.aspx) (link requires network access). | **Our tasks**   * Assist you in interpreting your web analytics. * Recommend testing options available to you. * Refine the testing scenarios and questions you drafted. * Give you possible timelines for the project. * Provide guidance on how to run web strategy surveys or focus groups. |
| **#3 Test** |  |
| **Your tasks**   * Run surveys or focus groups if needed. | **Our tasks**   * Run online tree or card-sorting testing if needed. |
| **#4 Analyze and move forward** |  |
| **Your tasks**   * Email [webhelp@phsa.ca](mailto:webhelp@phsa.ca) the results of your survey or focus groups if you have any. * Communicate web changes to stakeholders, including reminding them to update bookmarks if there are URL changes. | **Our tasks**   * Provide reports and review results with you. * Work with you on a plan for any structural changes for your webpages or a new website build. * Help you prepare a URL re-direct plan if need be. |

# Worksheet: project summary

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| **What is the reason for this web change or new website?** | **Fill out this section** |
| What is the purpose? What problem are you trying to solve for your users or your team? Think of which [PHSA strategic objective](https://pod.phsa.ca/our-phsa/Our-Strategic-Plan/Pages/default.aspx) you’re supporting with this project.  Why now? |  |
| **Who is your primary audience(s)?** |  |
| Are they internal or external?  Identify important audiences, such as PHSA staff, health professionals across the province, patients/clients, and families.  List any special considerations your audiences might need for making your site accessible to them. E.g. poor vision or poor motor control |  |
| **What are my users trying to achieve?** |  |
| **As a** [role of user/audience] **I would like to** [description of task] **so that I can** [description of end goal]  Examples:   * **As a** parent bringing a child to the hospital, **I would like to** find the clinic room number and phone number easily **so that I can** call to clarify information and find them easily once at the hospital. * **As an** oncologist, **I would like to** find information about oncology drugs that BC Cancer recommends for use **so that I can** I can maintain excellent patient care. |  |
| **What is success?** | **Fill out this section** |
| Put your audience’s needs first. How can you make the experience better for your users/audiences?  How would your website visitor define success?  How would your team define success? |  |
| **What are the resources and timelines for this project?** |  |
| People, budget, timelines (if any). |  |
| **Who is the manager or department head who has given approval?** |  |
|  |  |
| **What are other sources of information you have about your audience?** |  |
| List contact points with your users such as patient experience teams, customer service teams, emails, or contact forms to find their suggestions or issues.  You can request analytics for existing webpages. Email [webhelp@phsa.ca](mailto:webhelp@phsa.ca) with the URL of your webpages. |  |

# Appendix 1: Types of user testing

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| **Types of testing** | **When and why we use it** | **How to carry it out** | **Keep in mind** |
| **Focus groups**  An in-person, moderated discussion | * Typically conducted before other types of testing. * Gain an understanding of your audience and their needs. * Find the words they use when interacting with your site. * Uncover pain points for your users. * Find out how and when they interact with your website. | See the web focus group guidelines (appendix 2) in this toolkit.  You’ll conduct the focus groups. We’ll help you plan it. | Results from focus groups can be misleading if one or two people have strong opinions.  Gather ideas on what to test but don’t make final decisions based on focus group results. |
| **Surveys**  A questionnaire filled out by users. Usually conducted online, but can be done in-person and on paper. | Receive quick, basic feedback on an existing site.  Evaluate or validate changes you made. | We’ll help you formulate the survey.  You’ll promote and conduct the survey. | Learn [how to draft good survey questions](https://www.surveymonkey.com/mp/writing-survey-questions/) (Survey Monkey)  See [survey tools available](http://2pod.phsa.ca/workplace-resources/computers/survey-tools/Pages/default.aspx) to PHSA staff |
| **Tree-testing**  Participants are given scenario questions online and asked to navigate through the structure of your site. | Learn how users interact with your current or proposed navigation.  Use to validate ideas you have for your structure | This testing requires special software. We’ll work with you to:   * Determine the different audience groups you want to test with – ex health provider, patient, family etc. * Define the tasks you’ll be asking the participants to do. * Send link out to your group(s) of testers. | A maximum of 10 to 12 tasks are recommended. You could do a few more if you are paying people.  In testing scenarios, avoid using the same language that exists in your navigation tree, as much as possible, so you don't bias the user. |
| **Card-sorting**  Participants sort provided topic cards (typically the names of webpages) into groups so you can see how they would expect to see your info  Three types:   * Open * Closed * Hybrid – mix of two | Generate new ideas for the structure and labelling of your webpages | Two ways:   * Remotely via software * In-person with real cards | * Works great in tandem with tree-testing * No more than 60 cards for open card sort * No more than 90 cards for closed card sort * For Hybrid sort, you can have an "I don't know" category which helps users if they really can't figure out where to put something. |

# Appendix 2: guidelines for web focus groups

Focus groups (moderated discussions) can provide useful feedback from users about your website.

## Preparing for the focus groups

* Determine the purpose and the scope of the focus group.
* Draft a script of questions, activities and breaks, and email it to [webhelp@phsa.ca](mailto:webhelp@phsa.ca) for approval. Your focus group should ideally be one hour long, or 1.5 hours maximum. We can help you:
  + Determine if you’re asking the right questions to get the information you need.
  + Ensure that your focus group has a realistic scope.
* Need help developing your script? Read the section “developing your focus group script” on page 8-9.
* Connect with appropriate legal and privacy resources, including getting waivers, if needed. [Information Access & Privacy Services POD page](http://2pod.phsa.ca/quality-safety/privacy/Pages/default.aspx) and [Legal Services page](http://2pod.phsa.ca/our-phsa/browse-by-department/Pages/Legal-Services.aspx).
* Ensure that your 5-15 participants reflect your target audience. It’s better to run separate focus groups for different sub-groups. Collect demographic information from your participants in advance to save time from your focus groups, such as:
  + What type of participant are they? Patient, family member or health professional?
  + How frequently do they use the website?
  + How recently did they use the website?
  + How frequently do they use computers or the internet?
* Inform the participants about the focus group’s:
  + **Schedule and event info**: date and time, agenda, location, how to get there, parking, bathrooms, disability access, snacks and water provided.
  + **Expectations**: responsibilities of participants, moderator and note-taker, compensation (if applicable)
  + **Process**: how the focus group will run, how the info will be recorded and used, how participants can ask questions.
* Select a moderator and a note-taker from your team. The moderator and note-taker should be two separate people.

## Running your focus group

**The moderator should:**

* Ensure that participants sign in.
* Introduce themselves and the purpose of the focus group. They should emphasize that there are no right or wrong answers, and they want to hear all feedback.
* Brief participants on the objectives of the session. Establish and maintain ground rules.
* Guide the discussion, and keep it on topic and on schedule.

**The note-taker should:**

* Record data from focus group discussion by note-taking, video or audio recording. If you are using video or audio, it is still helpful to write notes, capturing interesting quotes and key themes. You may also record quotes by a participant’s initials.
* De-brief the session with the participants and the facilitator, either at the end of the focus group or later via email.
* Compile a report of proceedings for the organizers.

**Analyzing your results**

When reviewing your focus group’s feedback, you may want to:

* Examine if interactions between members affected feedback. Was any participant influencing the conversation?
* Look for themes in the feedback. Determine if there are any next steps or follow-up.
* Rank findings by their potential for improving user satisfaction. Act on critical recommendations first.

## Developing your focus group script

**Introduction**

* Welcome participants. Moderator introduces themselves and note-taker.
* Explain the purpose of the focus group, how information will be recorded and used.
* Review the schedule for the session and ground rules.

**Ask participants about their needs before asking website questions**

* What are your needs? / What information are you looking for? / Which tasks are you trying to do?
* How do you find this information or support?

**Ask questions about the website**

* You may want to project the website as you ask questions about specific sections.
* The questions you ask about the website/users should reflect the purpose of your focus group, and should be framed neutrally.
  + Not neutral: what’s wrong with the homepage?
  + Neutral: how do you feel about the homepage? What are your overall impressions?
* Types of questions you may want to consider asking:
  + What words do you use to search for [topic X]?
  + What type of information would you expect to find on this website/webpage?