Stop Listening to Customers

Discovering Insights Through Observation

plantronics | DESIGN

Matt Mainini, M.Sc. | Todd Zazelenchuk, Ph.D.

“A Faster Horse”

12 - 17 - 31 - 40

Nisbett & Wilson, 1977

“I’ll Take Black, Please…”

People don’t always do
what they say they will do.

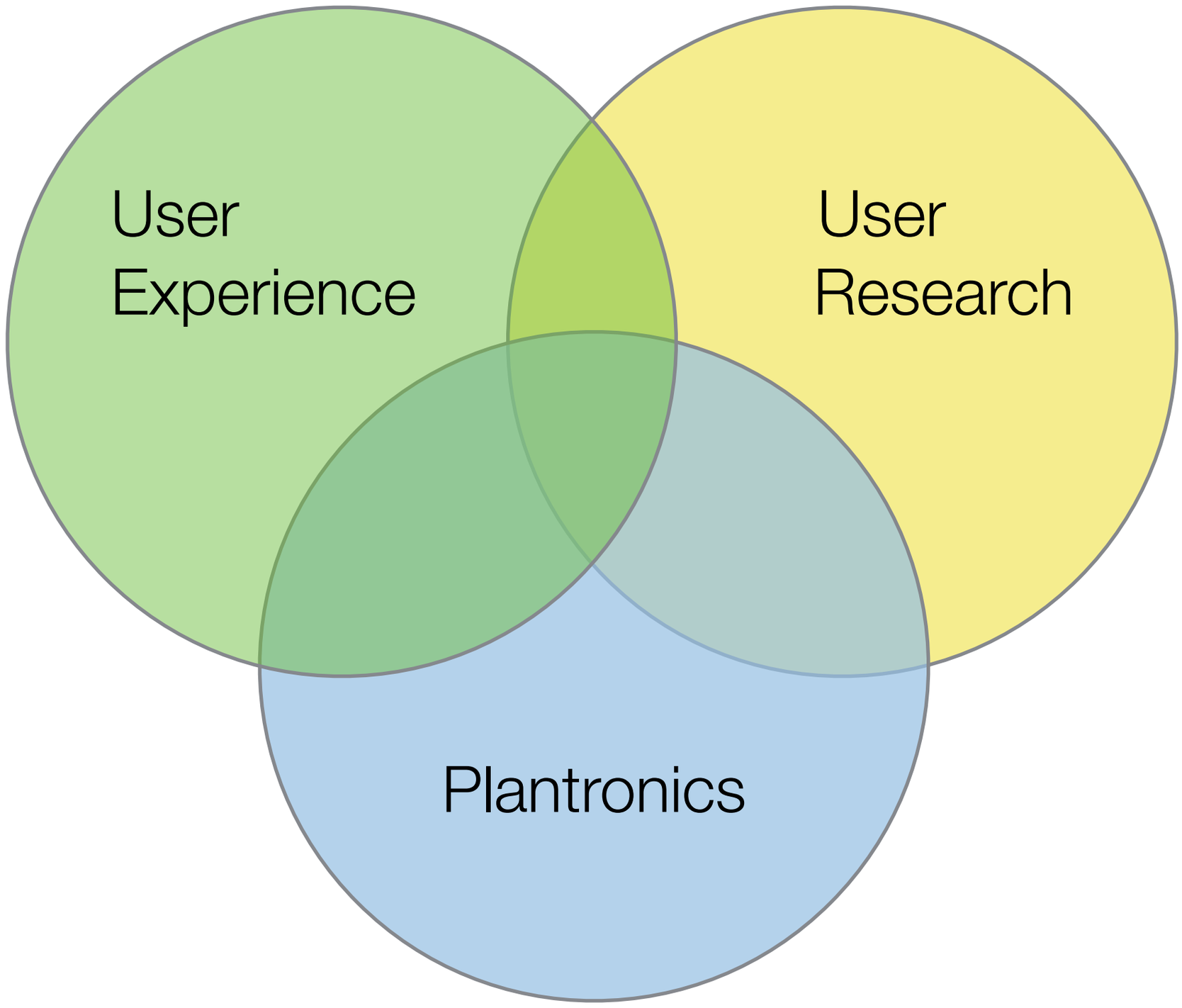
People don't always do
what they say they will do.

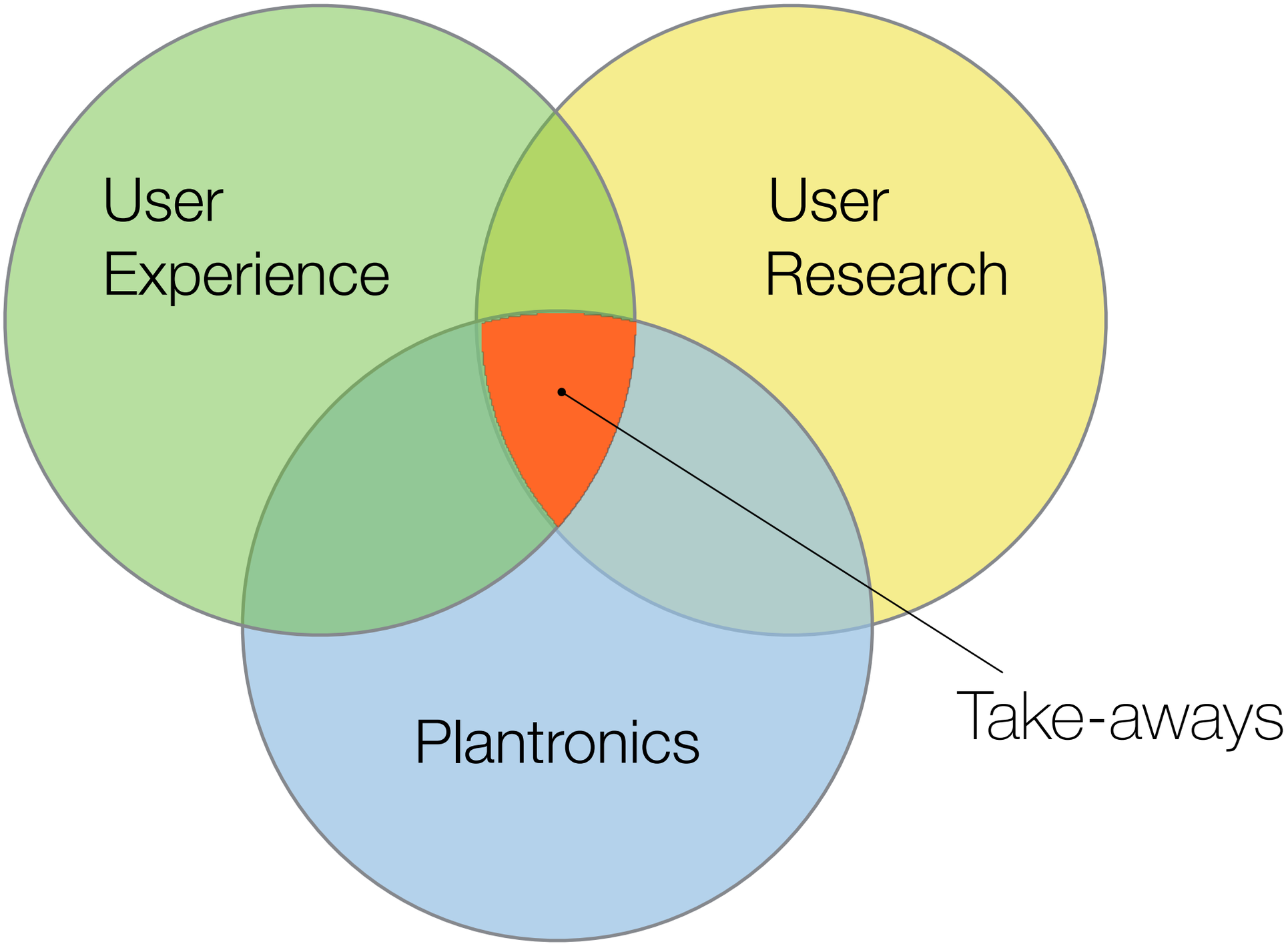
People struggle to describe
why they behave the way they do.

People don't always do
what they say they will do.

People struggle to describe
why they behave the way they do.

People are not very good
at articulating what they want or need.


User
Experience
User
Research
Plantronics


User
Experience
User
Research
Plantronics
Take-aways

4

Defining **UX**

Designing **UX**

Evaluating **UX**

PLT **UX** Research

Defining **UX**

Betty Crocker

Betty Crocker

You will need:

1 Cup
Water

1 Stick (½ Cup)
Butter, Softened

Betty Crocker

You will need:

1 Cup
Water

1 Stick (½ Cup)
Butter, Softened

3 Eggs

"User Experience" encompasses
all aspects of the end-user's interaction
with the **company**, its **services**, and its **products**.

~Nielsen & Norman

"User Experience" encompasses
all aspects of the end-user's interaction
with the company, its brand, and its products.

~Nielsen & Norman

What User Experience Comes to Mind?

Designing **UX**

Designing **UX**

Questions about whether design is necessary or affordable are quite beside the point: **design is inevitable**.

The alternative to good design is bad design, not no design at all.

– Douglas Martin

Questions about whether UX is necessary or affordable are quite beside the point: UX **is inevitable**.

The alternative to good UX is bad UX not no UX at all.

– Douglas Martin

UX is Inevitable

Human Aspects of Computing

Henry Ledgard Editor

Designing for Usability: Key Principles and What Designers Think

JOHN D. GOULD and CLAYTON LEWIS

ABSTRACT: *This article is both theoretical and empirical. Theoretically, it describes three principles of system design which we believe must be followed to produce a useful and easy to use computer system. These principles are: early and continual focus on users; empirical measurement of usage; and iterative design whereby the system (simulated, prototype, and real) is modified, tested, modified again, tested again, and the cycle is repeated again and again. This approach is contrasted to other principled design approaches, for example, get it right the first time, reliance on design guidelines. Empirically, the article presents data which show that our design principles are not always intuitive to designers; identifies the arguments which designers often offer for not using these principles—and answers them; and provides an example in which our principles have been used successfully.*

Any system designed for people to use should be easy to learn (and remember), useful, that is, contain functions people really need in their work, and be easy and pleasant to use. This article is written for people who have the responsibility and/or interest in creating computer systems (or any other systems) with these characteristics. In the first section of this article we briefly mention three principles for system design which we believe can be used to attain these goals. Our principles may seem intuitive, but system designers do not generally recommend them, as results of surveys reported in Section 2 show. The recommendations of actual designers suggest that they may sometimes think they are doing what we recommend when in fact they are not. In Section 3 we contrast some of their responses with what we have in mind to provide a fuller and clearer description of our principles. In Section 4 we consider why designers might not actually be using our design principles. In Section 5 we elaborate on the three principles, showing how they form the basis for a general methodology of design. In Section 6 we describe a successful example of using our recommended methodology in actual system design, IBM's Audio Distribution System (ADS), and the advantages that accrued as a result.

1. THE PRINCIPLES

We recommend three principles of design.

Early Focus on Users and Tasks

First, designers must understand who the users will be. This understanding is arrived at in part by directly studying their cognitive, behavioral, anthropometric, and attitudinal characteristics, and in part by studying the nature of the work expected to be accomplished.

Empirical Measurement

Second, early in the development process, intended users should actually use simulations and prototypes to carry out real work, and their performance and reactions should be observed, recorded, and analyzed.

Iterative Design

Third, when problems are found in user testing, as they will be, they must be fixed. This means design must be iterative: There must be a cycle of design, test and measure, and redesign, repeated as often as necessary.

2. WHAT SYSTEM DESIGNERS AND PROGRAMMERS ACTUALLY SAY

We began recommending these principles in the 1970's. Often the reaction is that they are obvious. Nevertheless, these are not usually employed in system design

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RESEARCH CONTRIBUTIONS

Human Aspects of Computing

Henry Ledgard Editor

Designing for Usability: Key Principles and

Key Principles of User Centered Design

1. Early Focus on Users and Tasks
2. Empirical Measurement
3. Iterative Design

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“Designers shooting for usable
is like a chef shooting for edible.”

- Aarron Walter

Usability (alone) ≠ User Experience

Product Design

Experience Design

Product Design

Experience Design

Product Design

Experience Design

Product Design

Experience Design

https://mail.google.com

Google

+Todd

Share

New Message

Todd Zazelenchuk

Sample delighter w/ attachment

Hi Kursat,

Please find attached a copy of my bio for the talk on UX.

cheers,
tz
---

mail

COMPOSE

box (1)
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nap]/Drafts
ailbox]
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ving: Houses (2
ving: Social (1)
ad: Jobs (5)

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6:30 pm
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2:29 pm
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1:24 pm
1:21 pm
11:09 am
7:02 am
Feb 11
Feb 11

Experience Design - Gmail

https://mail.google.com

Google

+Todd

Share

New Message

Todd Zazelenchuk

Sample delighter w/ attachment

Hi Kursat,

Please find attached a copy of my bio for the talk on UX.

cheers,
tz
---

mail

COMPOSE

box (1)
nt Mail
afts (2)
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rcles
mail]Trash
nap]/Drafts
ailbox]
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ving: Coupons
ving: Houses (2
ving: Social (1)
ad: Jobs (5)

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6:30 pm
2:39 pm
2:29 pm
1:55 pm
1:24 pm
1:21 pm
11:09 am
7:02 am
Feb 11
Feb 11

Experience Design - Gmail

https://mail.google.com

The page at https://mail.google.com says:

Did you mean to attach files?

You wrote "find attached" in your message, but there are no files attached. Send anyway?

Cancel OK

Experience Design - Gmail

Experience Design - Plantronics Hub

Windows Desktop

Plantronics Hub Icon

Windows System Tray

Experience Design - Plantronics Hub

Experience Design - Plantronics Hub

Experience Design - Plantronics Hub

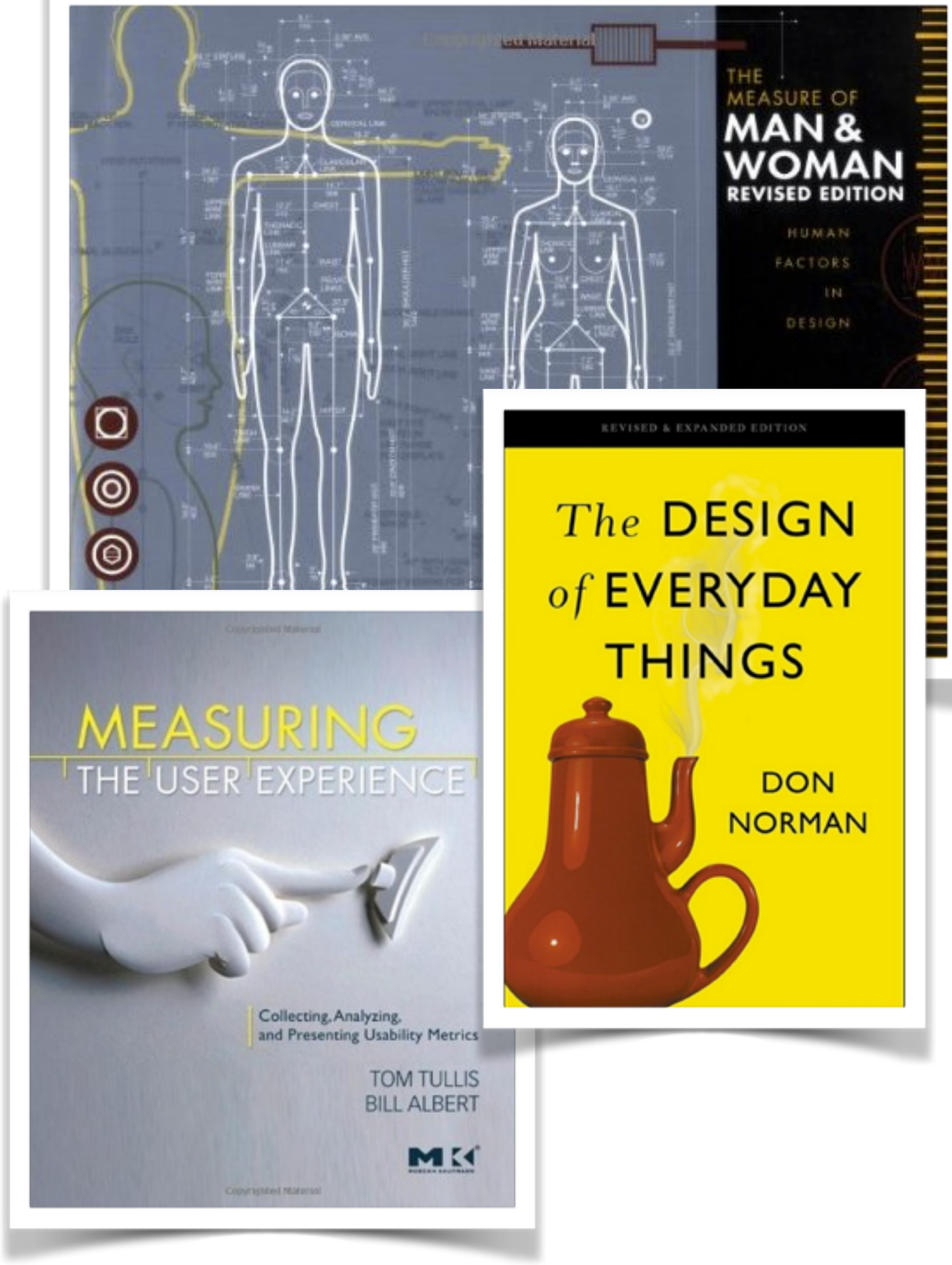
Experience Design - Plantronics Hub

Experience Design - Plantronics Hub

Experience Design - Plantronics Hub

Evaluating **UX**

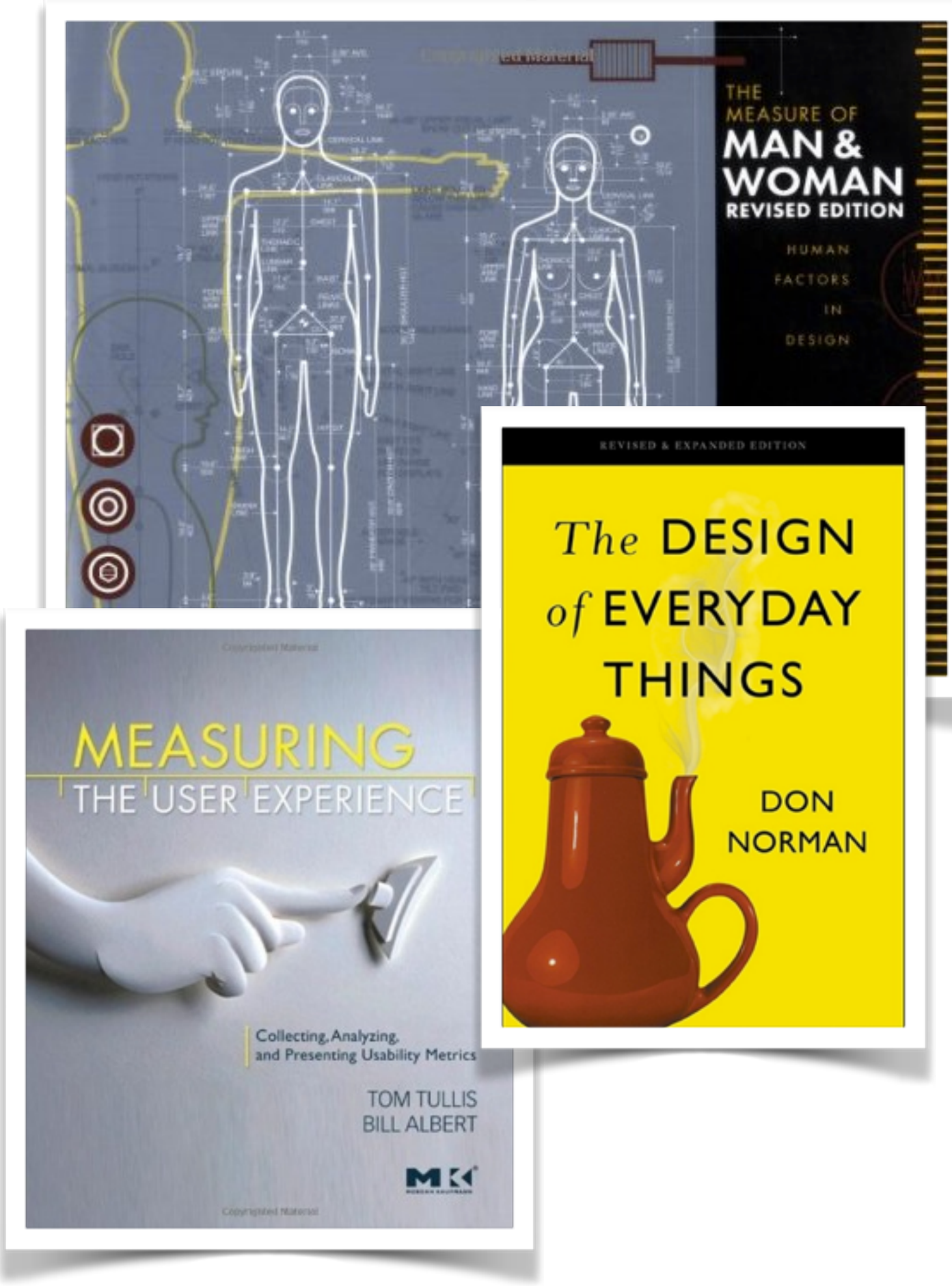
Human Factors (Ergonomics)



Usability

Human Factors (Ergonomics)

The study of designing equipment and devices that fit the human body and its cognitive abilities.



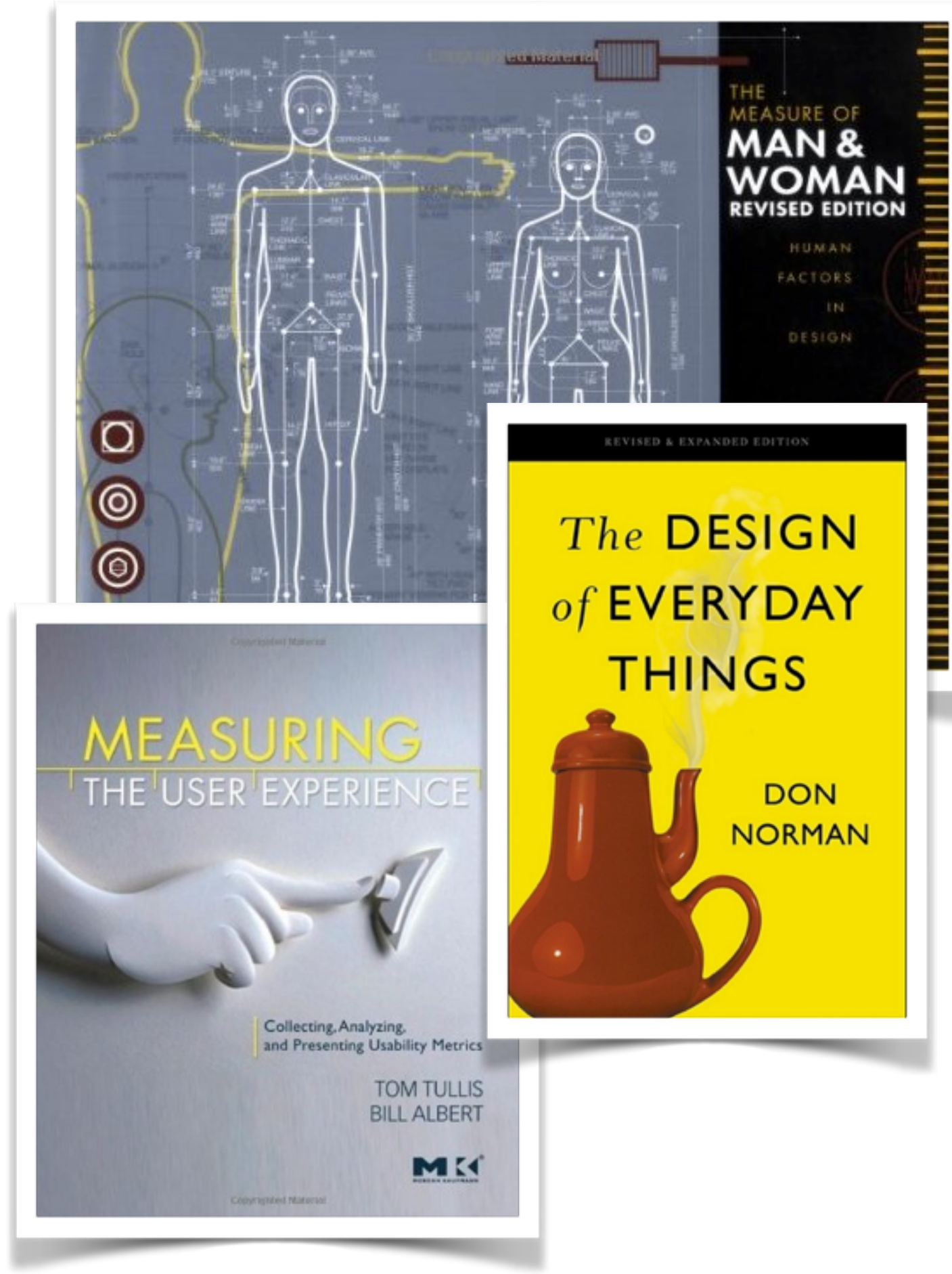
Usability

Human Factors (Ergonomics)

The study of designing equipment and devices that fit the human body and its cognitive abilities.

Usability

The extent to which a product can be used to achieve goals with **effectiveness**, **efficiency**, and **satisfaction**.



Basic Applied

Basic | Applied Research

	Basic	Applied
Goal	Knowledge	Solution
Driver	Researcher	Stakeholder
Context	Academic	Industry
Relevance	Society	Company
Result	General	Specific
Schedule	Flexible	Tight

Basic | Applied Research

PLT

	Basic	Applied
Goal	Knowledge	Solution
Driver	Researcher	Stakeholder
Context	Academic	Industry
Relevance	Society	Company
Result	General	Specific
Schedule	Flexible	Tight

Basic | Applied Research

Market | UX Research

Market Research

UX Research

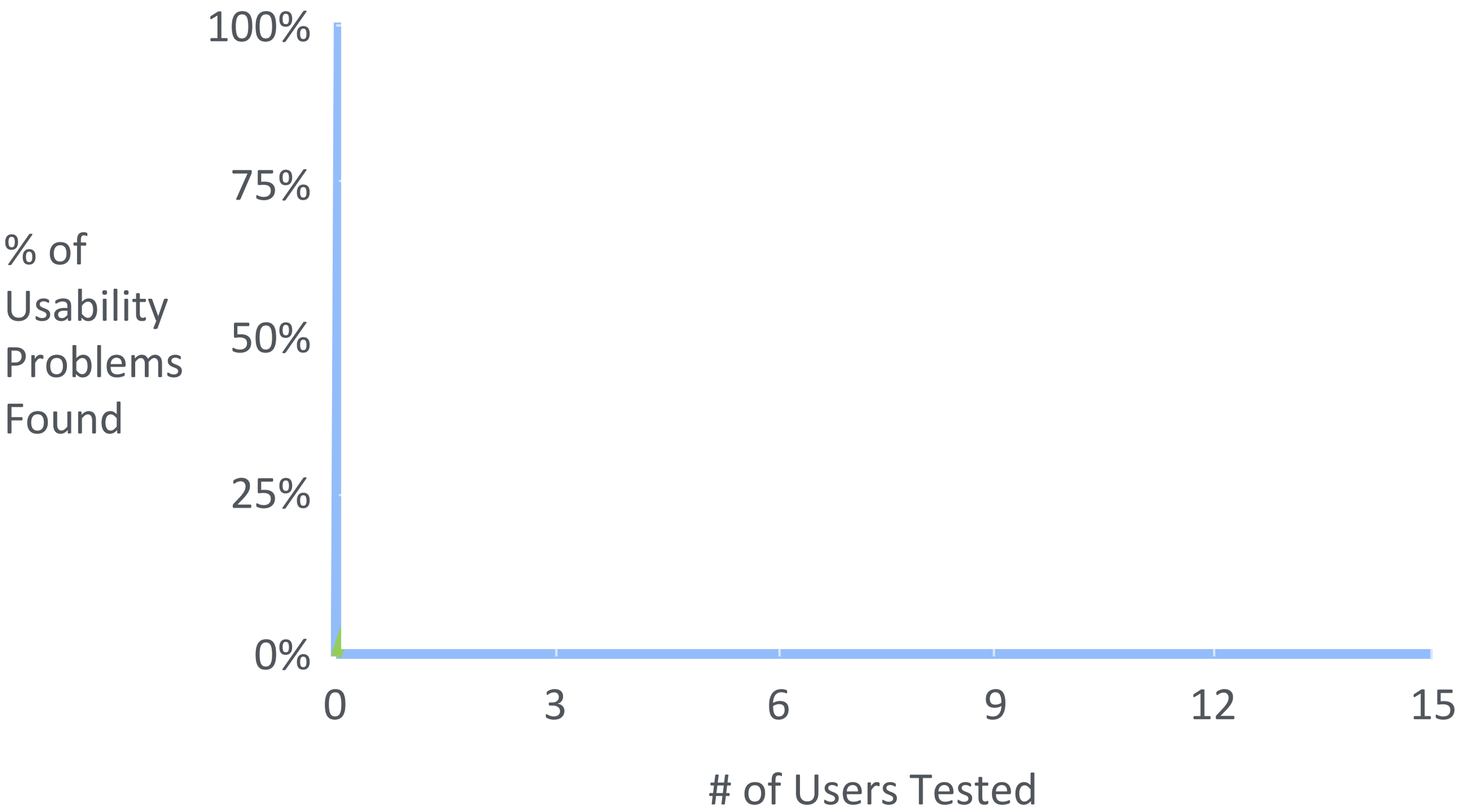
Market | UX Research

Market Research	UX Research
What users **say** (feedback)	
Identifies **market** needs	
Uncovers what people **want**	

Market | UX Research

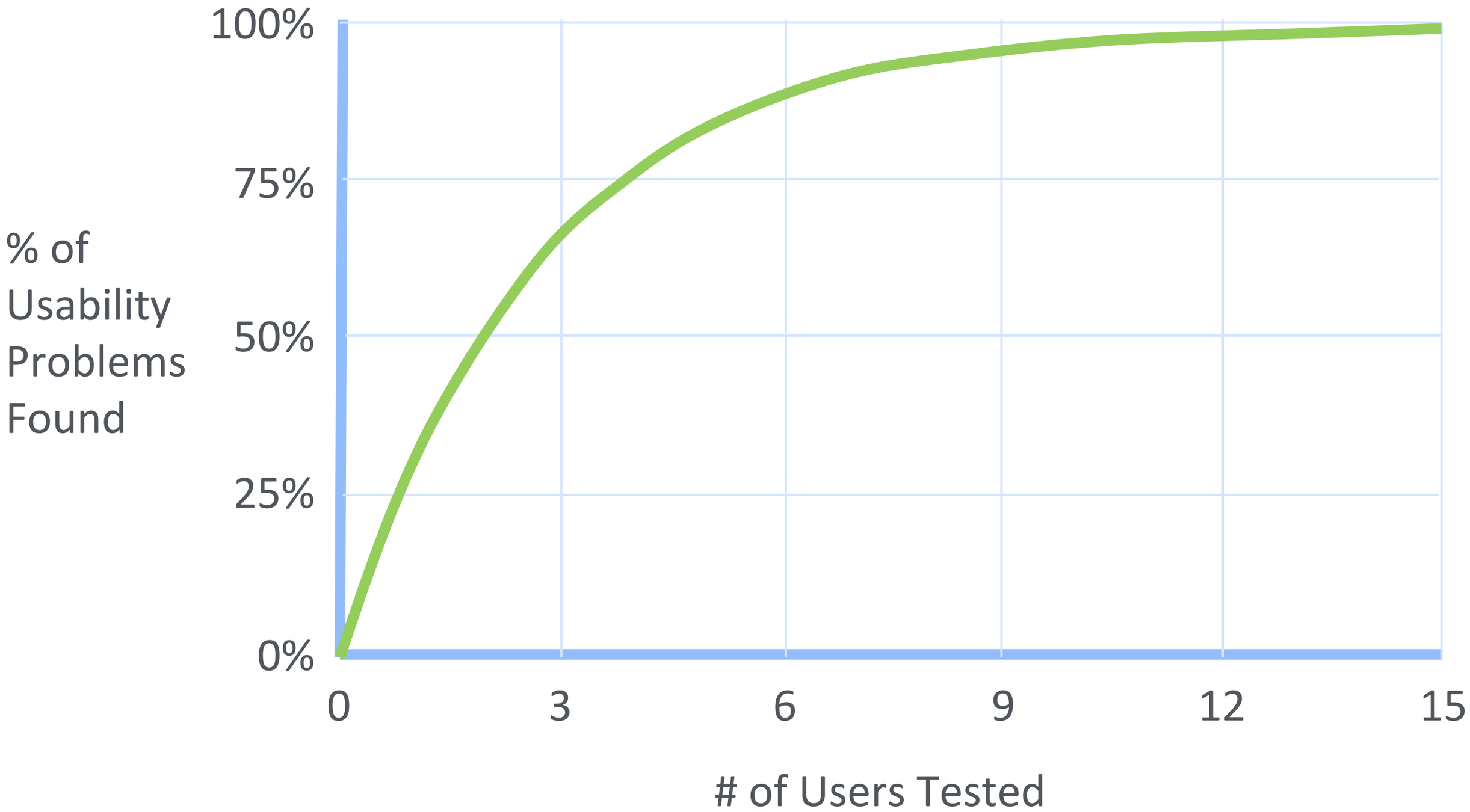
Market Research	UX Research
What users **say** (feedback)	What users **do** (behavior)
Identifies **market** needs	Identifies **user** needs
Uncovers what people **want**	Uncovers how people **perform**

Market | UX Research



Nielsen & Landauer, 1993

How Many Users?



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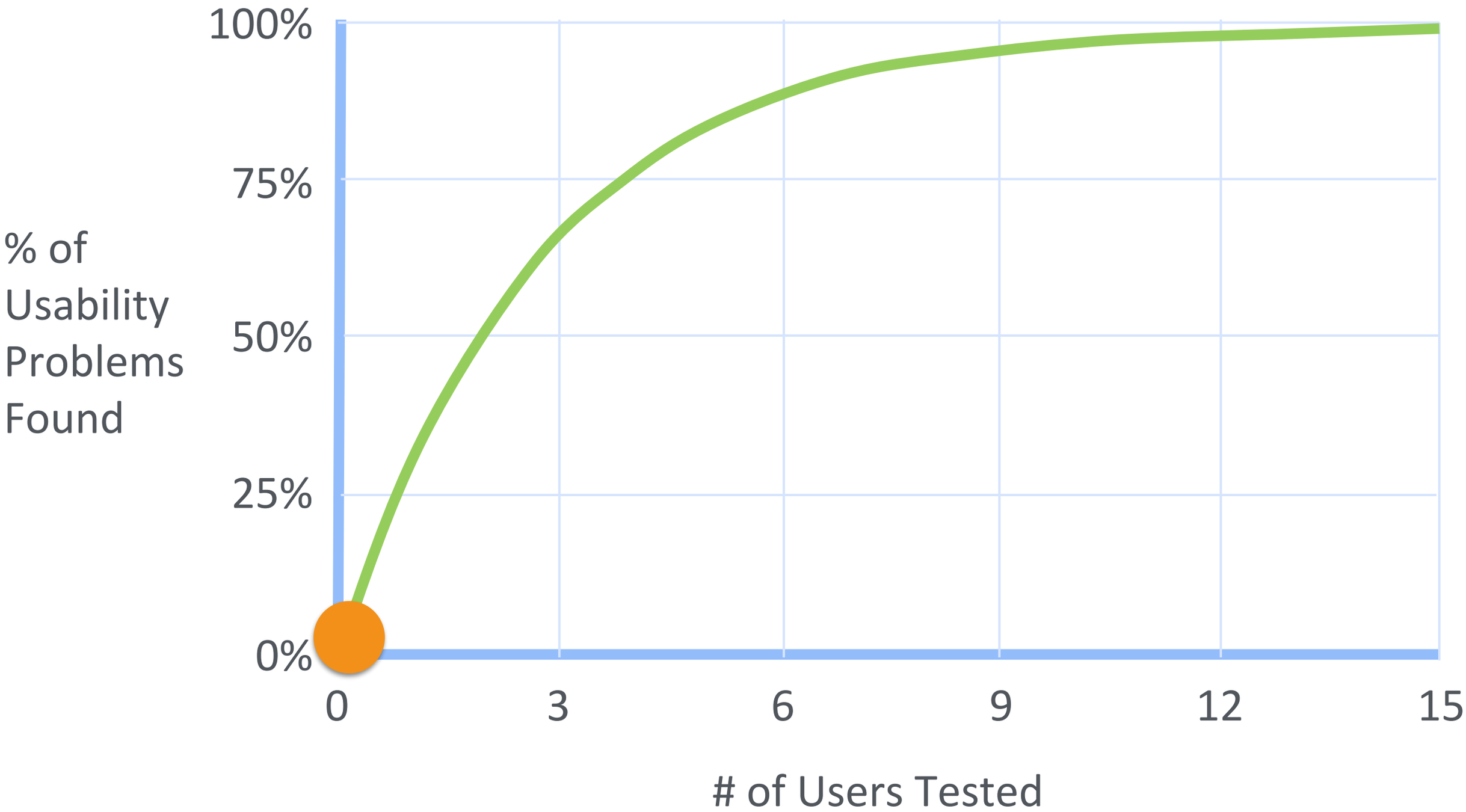

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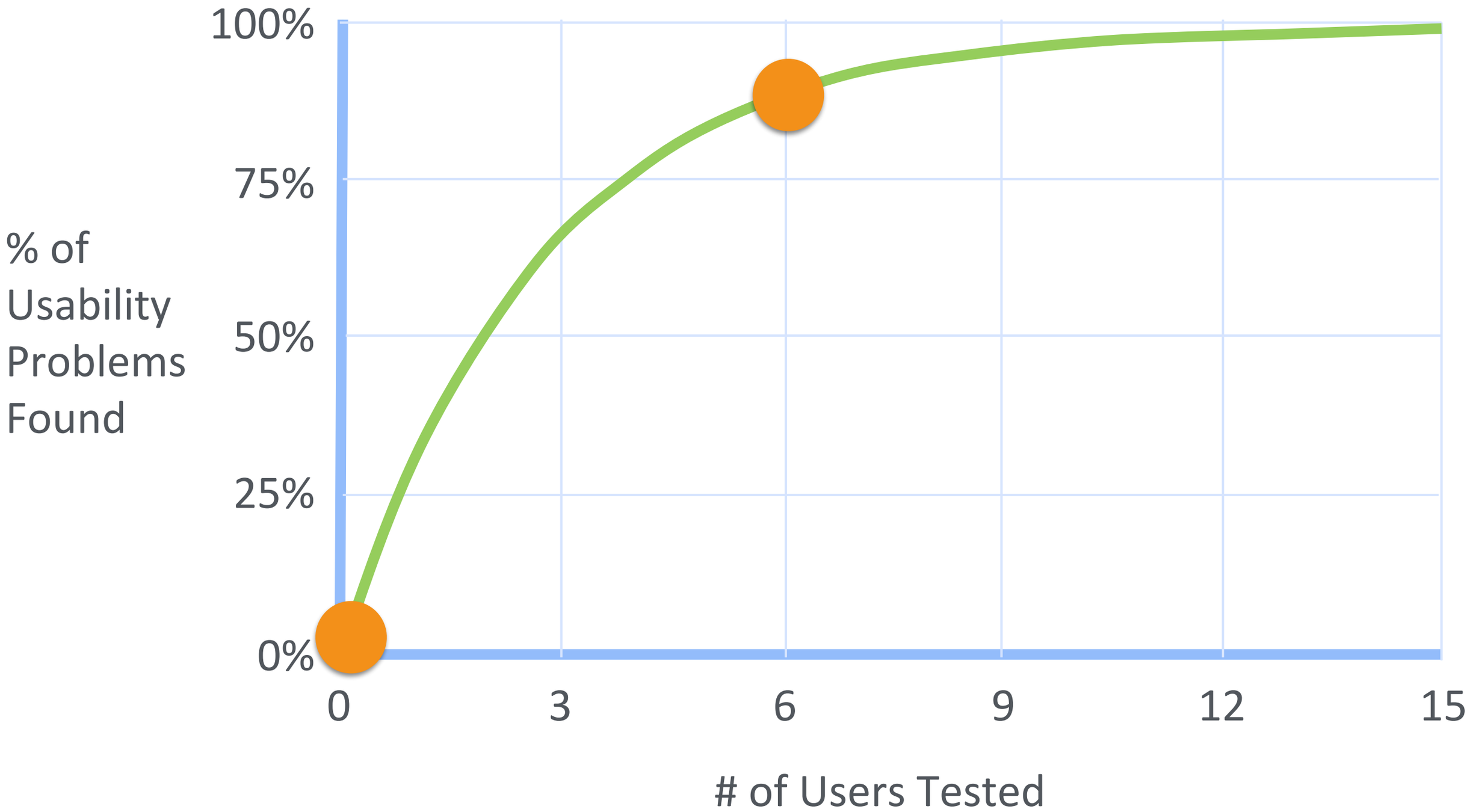


Nielsen & Landauer, 1993

How Many Users?

Usability

5-9

Ergonomics

12-18

How Many Users?

Stage Pre 0	Stage 0	Stage 1	Stage 2

UX Research Poster

Stage Pre 0	Stage 0	Stage 1	Stage 2

Field Ethnography

Benchmark Study

Facility/Store Visit

Survey

UX Research Poster

Stage Pre 0	Stage 0	Stage 1	Stage 2

Field Ethnography

Benchmark Study

Facility/Store Visit

Survey

Short-Term Usability Testing

Expert Evaluation

UX Research Poster

Stage Pre 0	Stage 0	Stage 1	Stage 2

Field Ethnography

Benchmark Study

Facility/Store Visit

Survey

Short-Term Usability Testing

Expert Evaluation

Long-Term Usability Testing

UX Research Poster

Stage	Stage Pre 0	Stage 0	Stage 1	Stage 2	Stage 3 - 4
PDP	Discovery	Concept	Definition Planning	Development	Production / End of life
Testing Category	Formative *(Informal and Expert Evaluation)*			Summative *(Prior to locking. External participants, statistics possible)*	

HF Test

LT Usability Testing

- **Who** — Between 6 to 18 internal PLT associates.
- **What** — Evaluate ergonomics and/or UI of HW or SW prototypes of various fidelities.
  Primarily HW focus on stability, fit and comfort.
  Usability of HW buttons, docking mechanisms and LED behavior.
- **Where** — Participant workstations.
- **Why** — Validate architecture, form factor, usability, other HF expectations.
- **Core Team Deliverable** — Submit UX request form.
  Provide a minimum of six identical EB1 or better models.
- **HF Output** — HF report presented to the core team, including recommendations.

ST Usability Testing

- **Who** — Between 6 to 18 internal PLT associates.
- **What** — Evaluate ergonomics and/or UI of hardware or software prototypes of various fidelities.
  Primarily hardware focus on stability, fit & comfort.
  Usability testing of hardware and software.
  OOBE Testing.
  Iterative.
- **Where** — UX Lab, or
  Participant workstations.
- **Why** — Inform design architecture, form factor, task flow.
  Discover stability, fit and comfort issues.
  New product category and geometries.
  Discover usability issues.
- **Core Team Deliverable** — Submit UX request form.
  HW: Provide a minimum of 2 physical prototypes 3 days prior to test date.
  OOBE: Provide 12 VB1 package samples.
- **HF Output** — HF report presented to the core team including recommendations.

Expert Evaluation

- **Who** — UX team members.
- **What** — HF/UX team members investigate potential issues in the design against a set of principles and provide recommendations to solve previously unknown issues and/or prevent potential issues.
- **Where** — Industrial Design department.
- **Why** — Participants not required; Heuristics will solve/prevent issues;
  Or, not enough time for robust HF/UX study.
- **Core Team Deliverable** — Brief UX team member(s) on current project status and provide necessary samples required for evaluation Ex: Prototypes, concepts.
- **HF Output** — Email prioritized issues in bulleted list; Recommendations included.

Field Ethnography

- **Who** — Roughly 6 – 20 end-user subject matter experts.
- **What** — Field research in which the HF/UX experimenter travels to the users' environments to accurately collect real behavioral data in context.
- **Where** — The location in which the product will potentially be used (context is essential).
- **Why** — The environmental factors influencing behavior with the product is not clear, or many variables may influence how the product is interacted with that needs to be understood in context.
  The design of the product will better synergize with the environment in which it will be used.
  The contextual information will inform design of the product.
- **Core Team Deliverable** — List of research questions.
  Two or more prototypes (if any).
- **HF Output** — UX report presented to core team including recommendations.

Benchmark Study

- **Who** — If necessary, between 6 and 18 internal or external participants.
- **What** — Comparing the current competitor products against each other and/or new PLT design.
  New design vs. old design.
  Expert evaluation of competitor products.
- **Where** — UX Lab, Industrial Design, or external contractor facility.
- **Why** — Early understanding of competitor forms, usability, and features.
  To understand how the proposed PLT concept compares to current day competition.
- **Core Team Deliverable** — Provide competitive products, PLT product samples, and necessary accessories.
- **HF Output** — HF report presented to core team.

Facility/Store Visit

- **Who** — UX team member(s).
- **What** — To observe and/or survey real users and their interactions with the workplace environment, such as the operations of a call center or user behavior in a retail store.
- **Where** — Call Center, office, retailer, manufacturer, etc.
- **Why** — To understand the mechanics of the workplace environment related to Human Factors and Ergonomics issues.
- **Core Team Deliverable** — List of research questions
- **HF Output** — Email or one-pager detailing the findings.

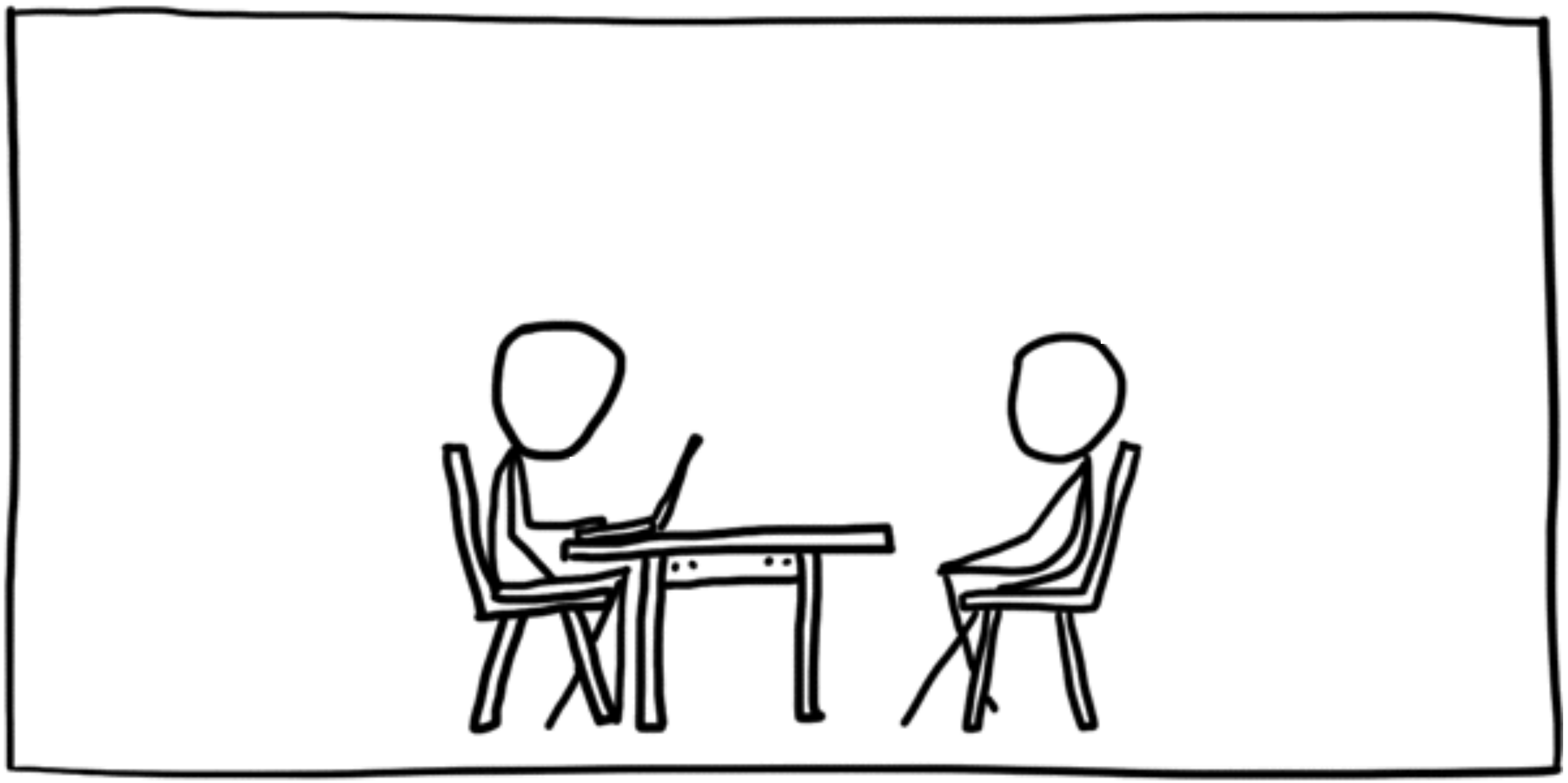
Survey

- **Who** — A sample of users that represents that target audience.
- **What** — Online survey to gather feedback for users perceptions, emotions, or understanding.
- **Where** — Online (google docs, survey monkey, lime survey, etc).
- **Why** — To understand the target audience's perceptions, emotions, and comprehension of the technology, sociology, environment, or use of a product.
- **Core Team Deliverable** — List of research questions
- **HF Output** — Report delivered to core team describing the findings.

Legend

UX: User Experience	PDP: Product Development Process
UI: User Interface	OOBE: Out of Box Experience
HF: Human Factors	VB1: Verification Build 1
HW: Hardware	EB1: Engineering Build 1
SW: Software	Core Team Deliverable: Pre-test samples
	HF Output: Post-test report/recommendations

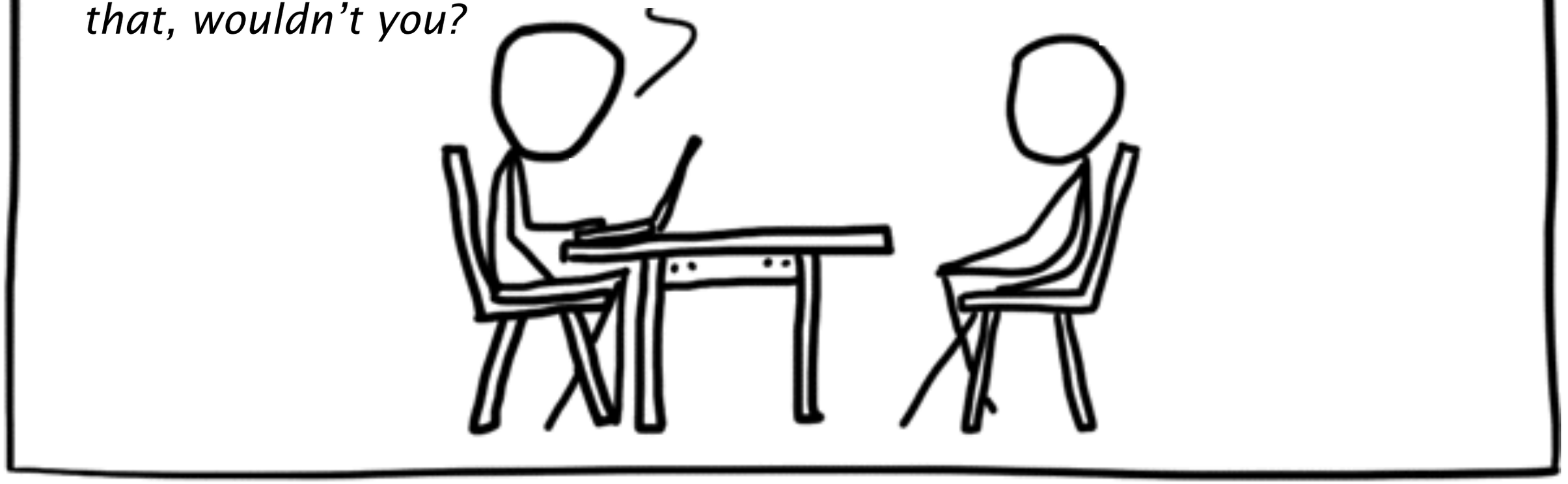
UX Research Poster



xkcd.com

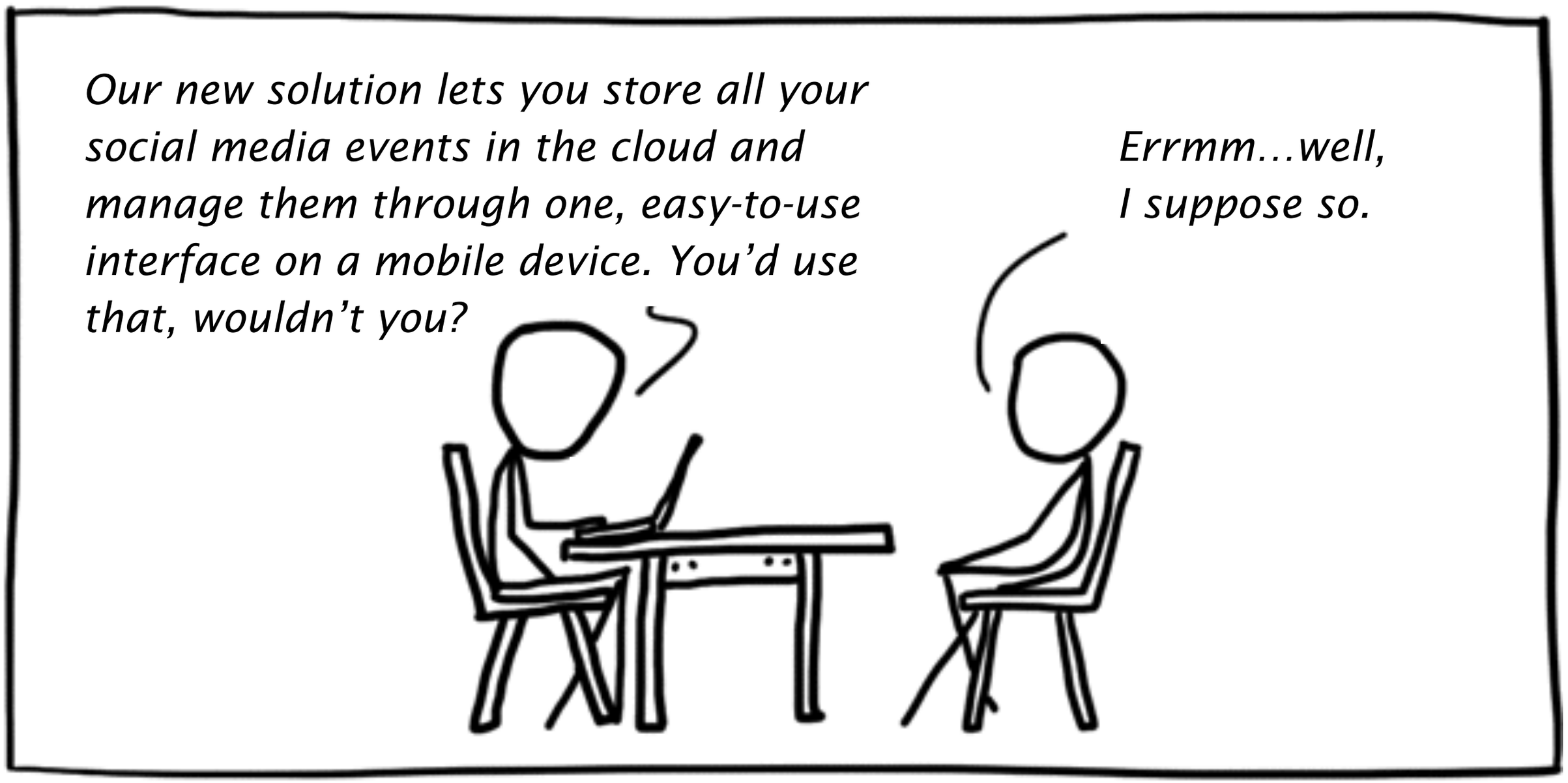
Tell Me…

Our new solution lets you store all your social media events in the cloud and manage them through one, easy-to-use interface on a mobile device. You'd use that, wouldn't you?



xkcd.com

Tell Me…



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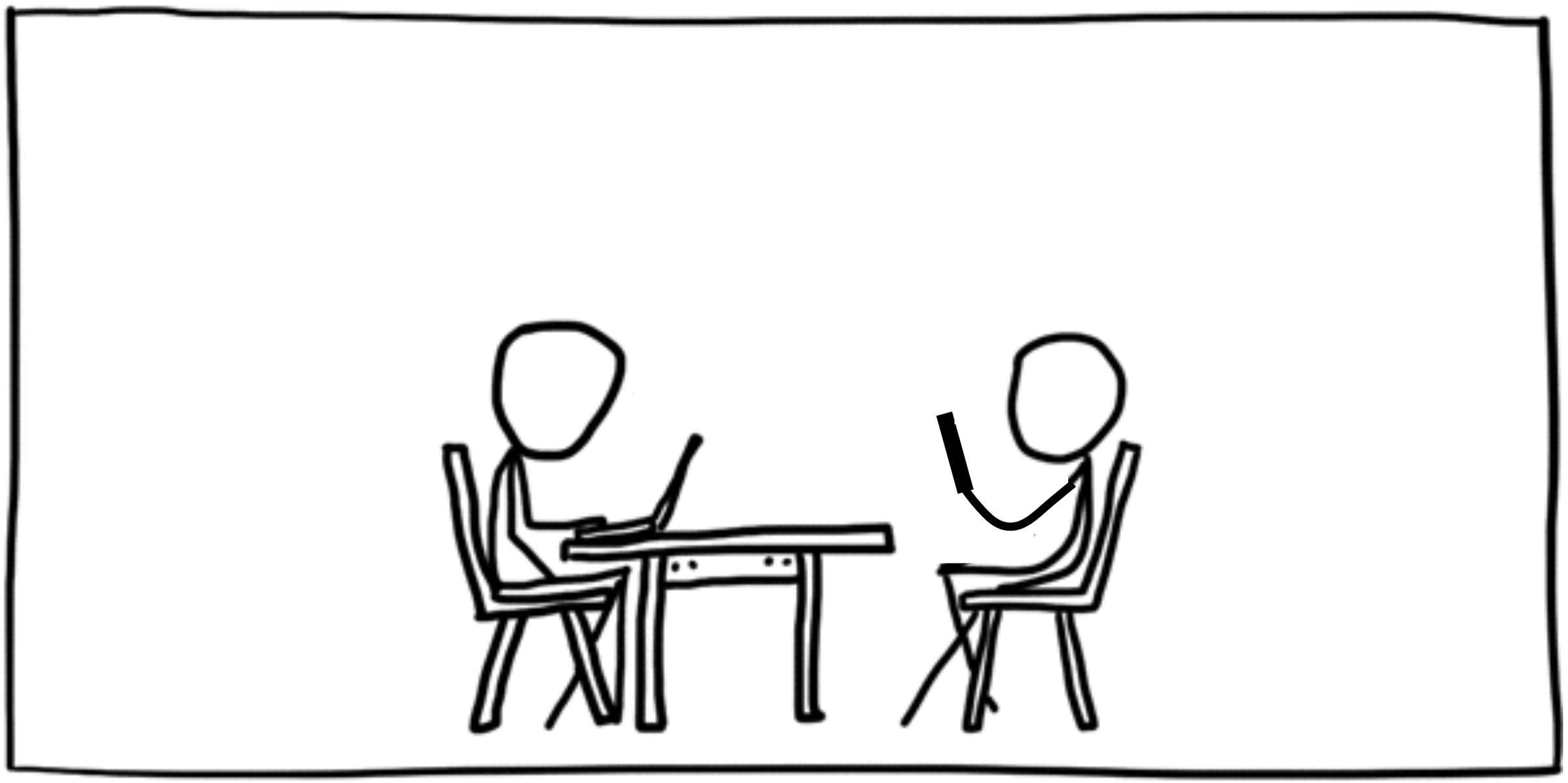
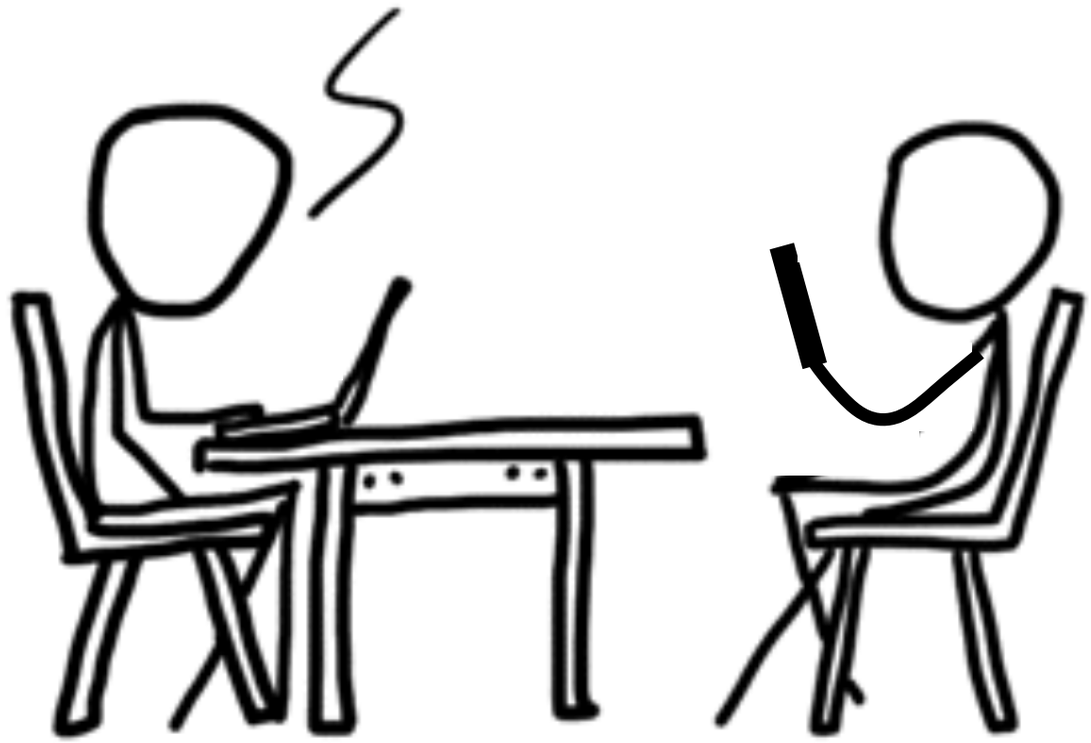


Show Me…

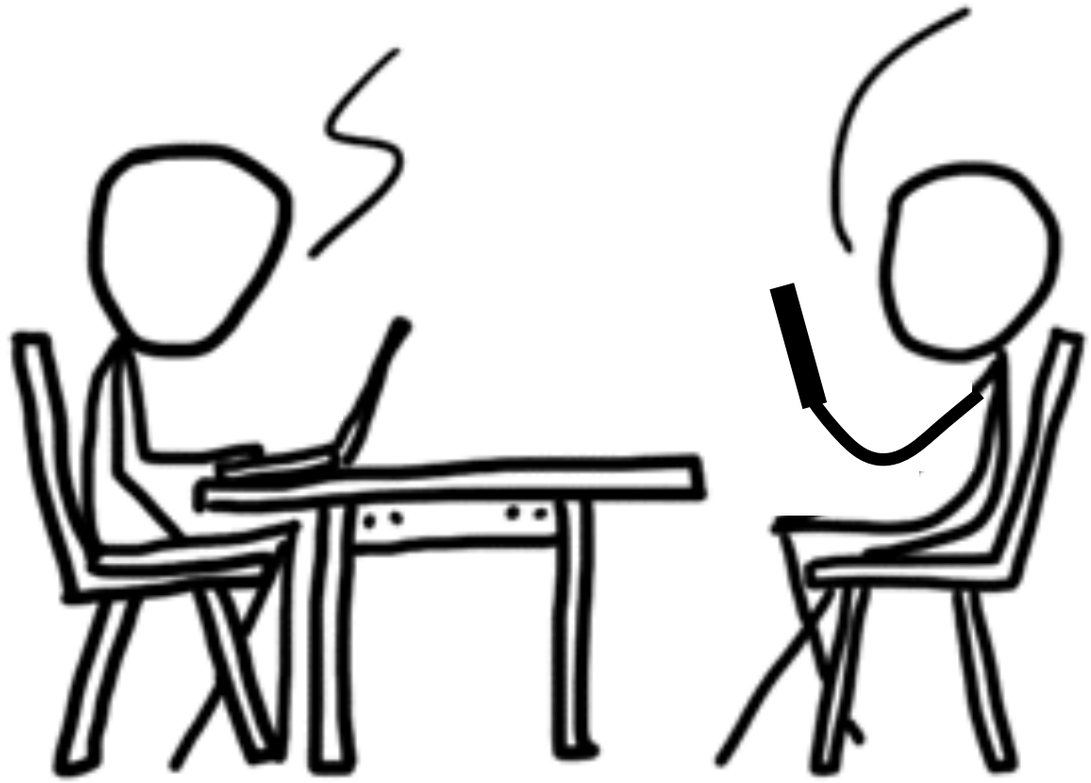
Show me how you would use your phone to complete this task…



Show Me…

Show me how you would use your phone to complete this task…

It looks like I need to create an account first, so I would tap here…



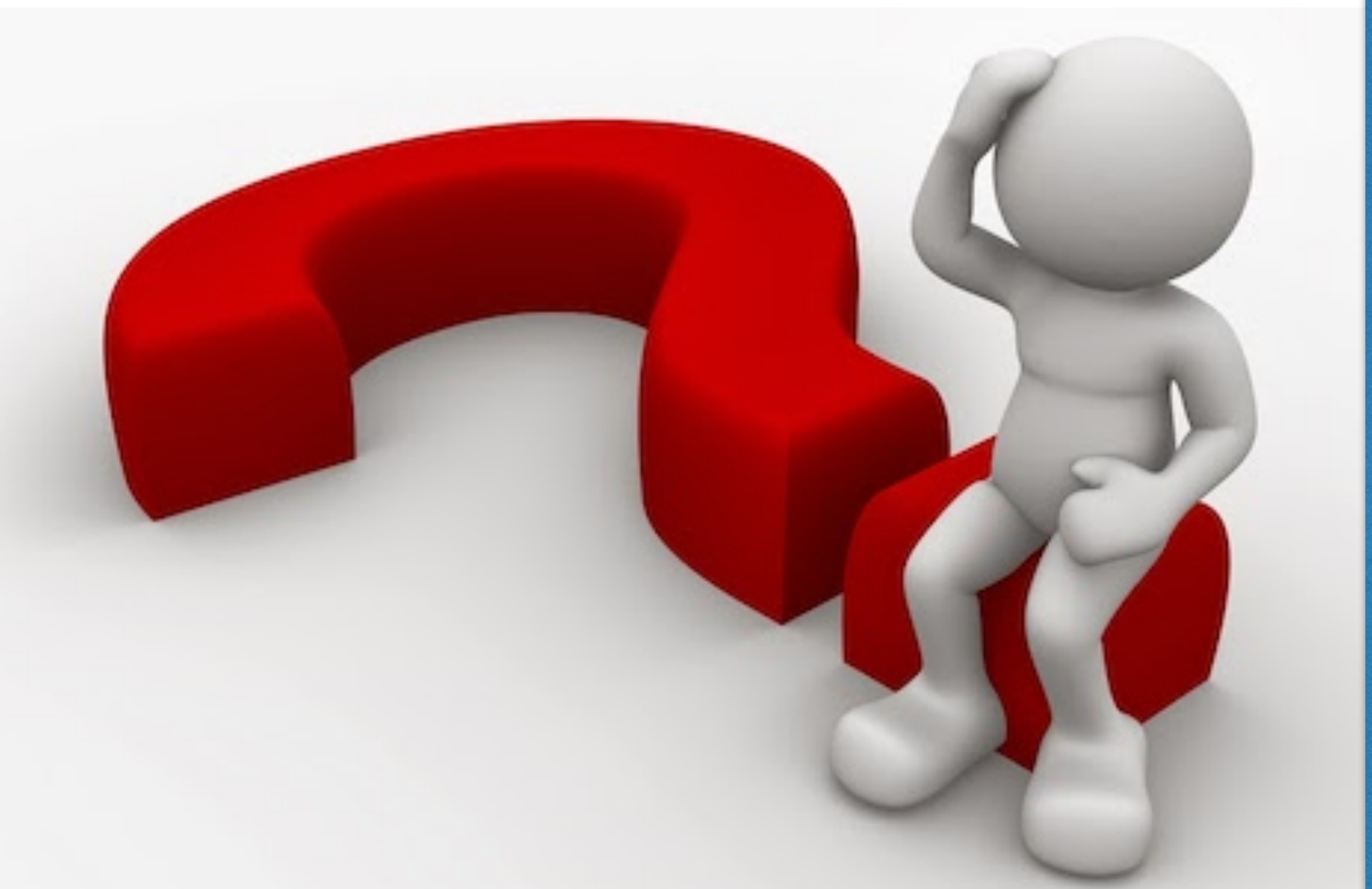
Show Me…

How much do you wear the headset?

How many hours per day does the target user wear the headset?

2 Questions…

The Research Process



Research questions

Test plan

Recruit

Facilitate

Analyze

Document

Share

Take action

The Research Process

Research questions

Test plan

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The Research Process

- Research questions
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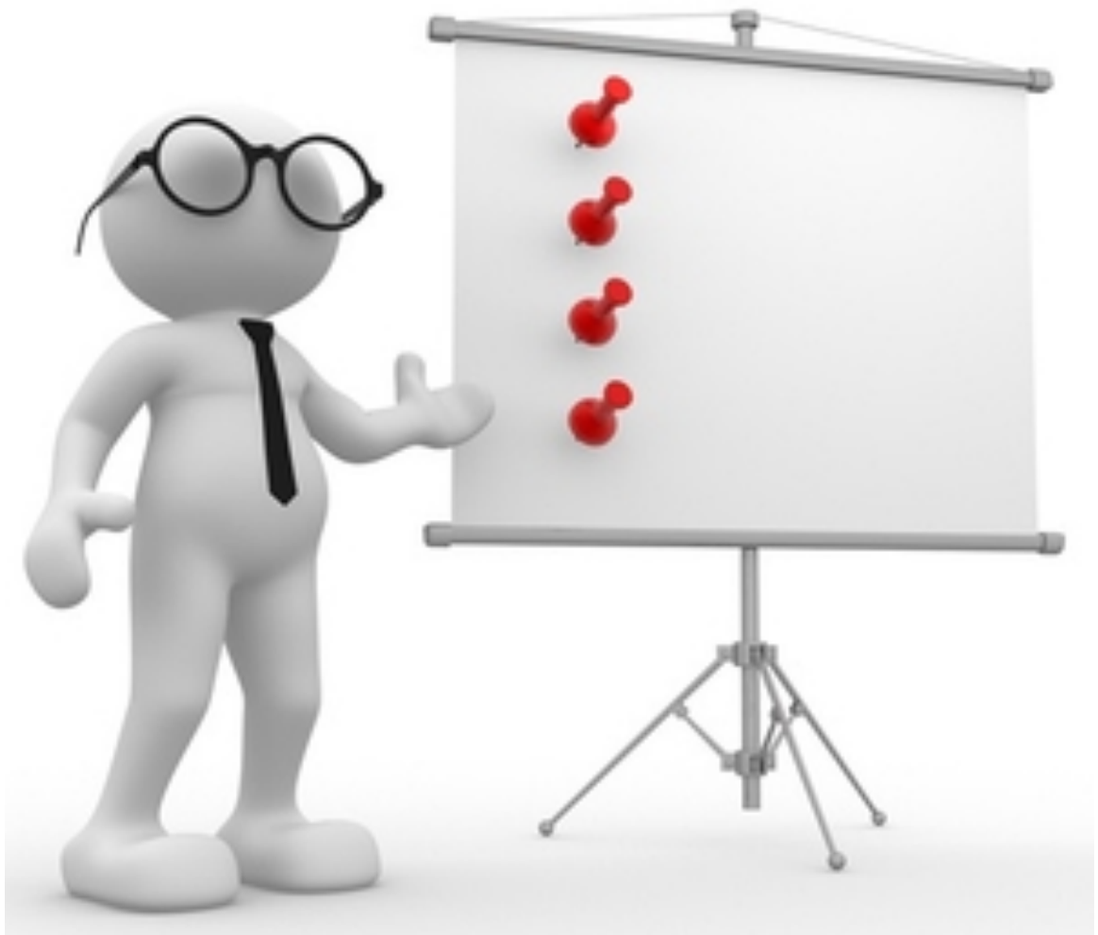

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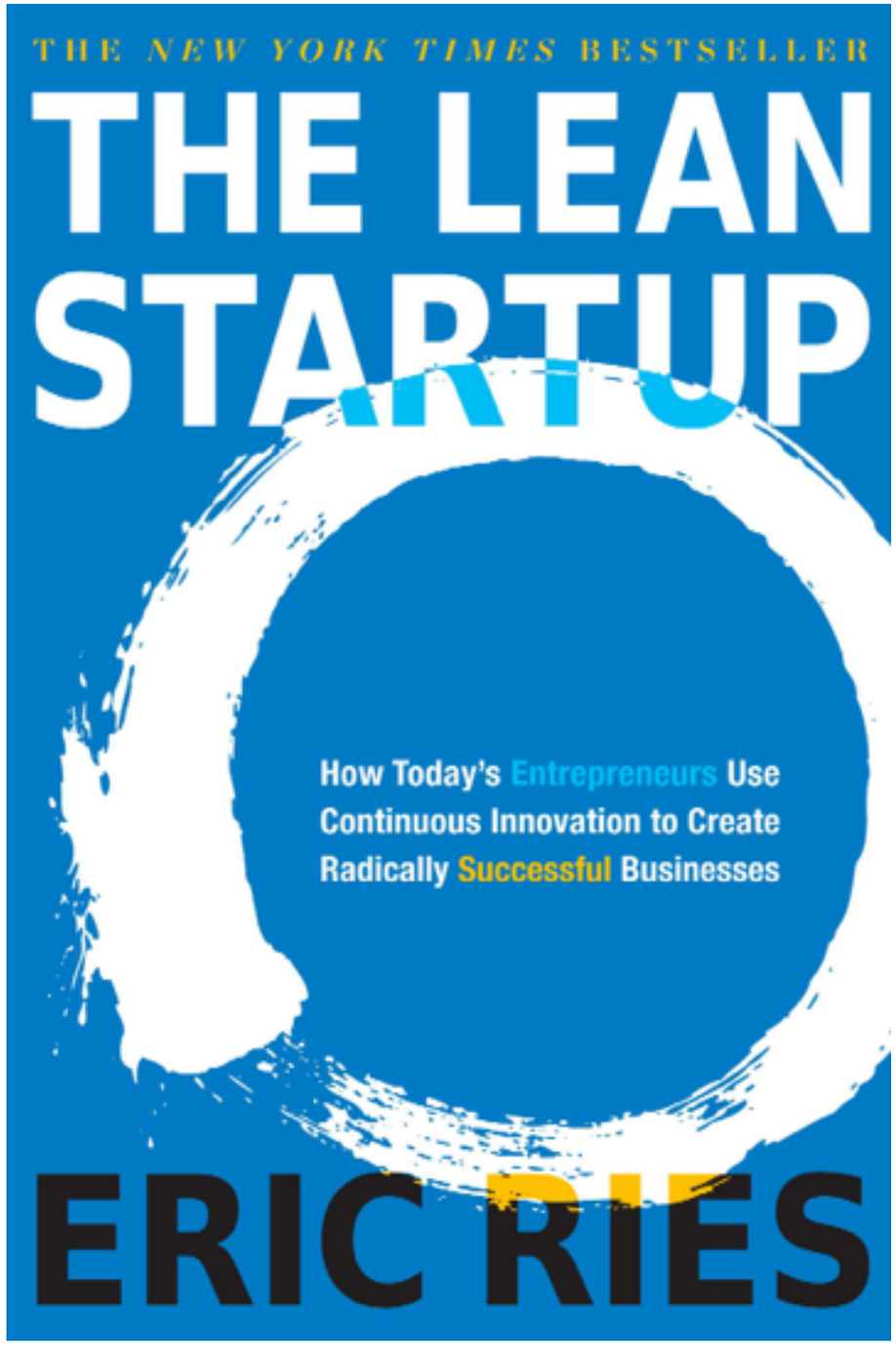
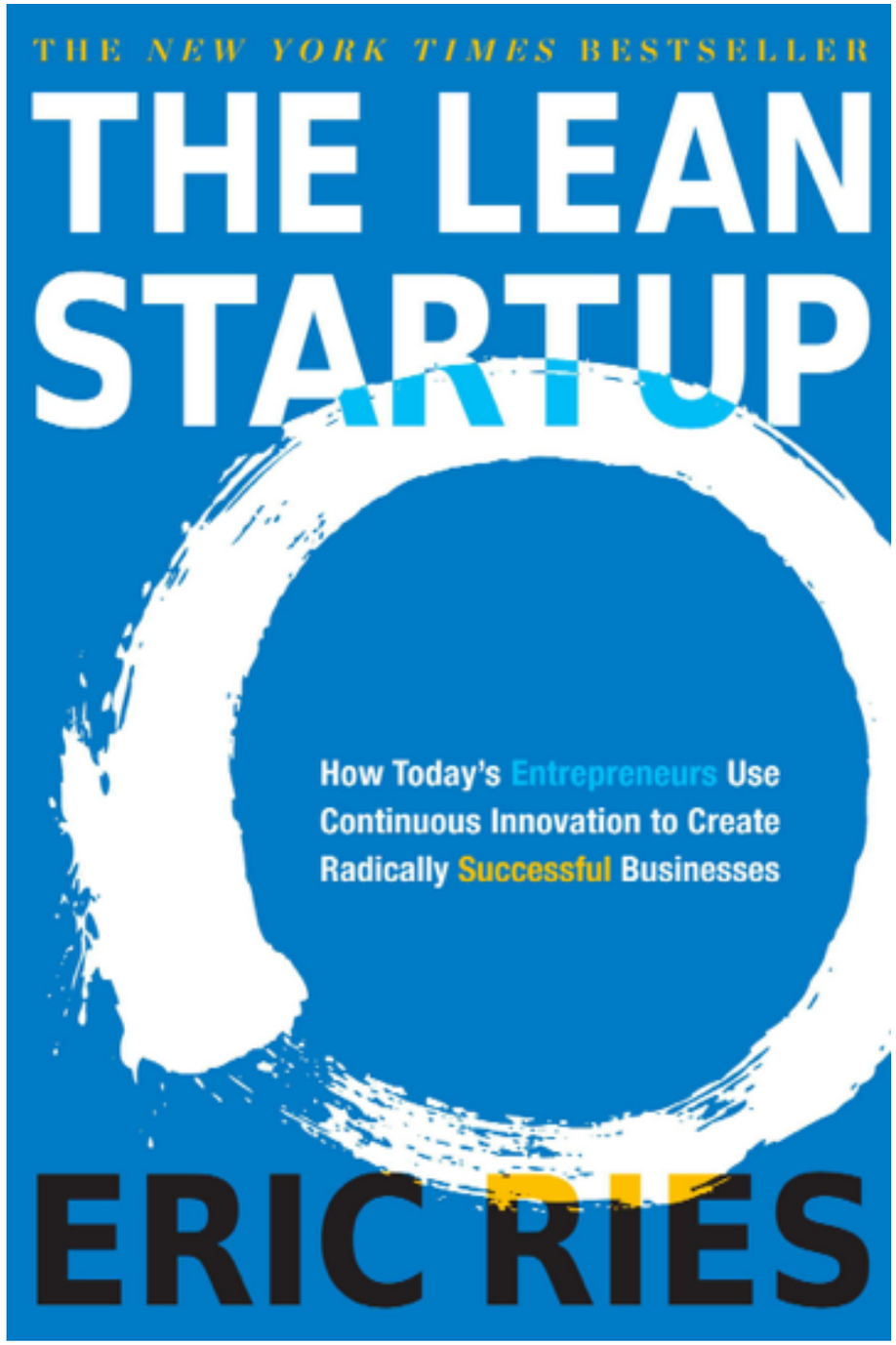
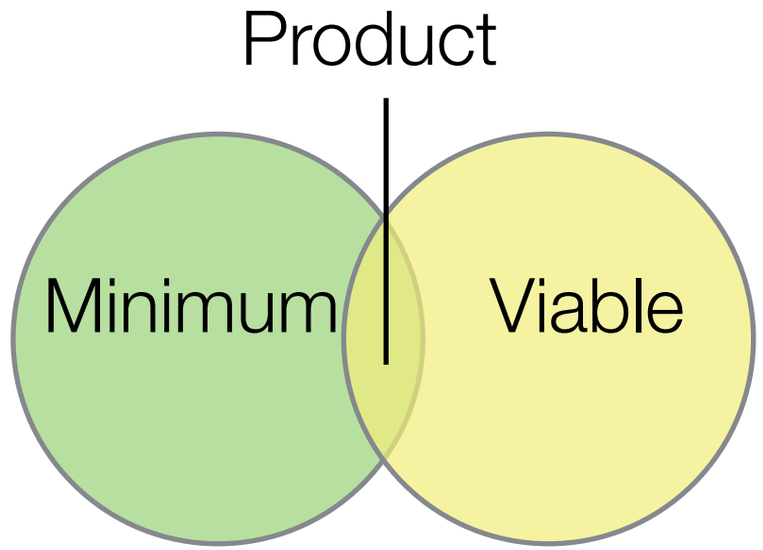


Embracing “Lean”





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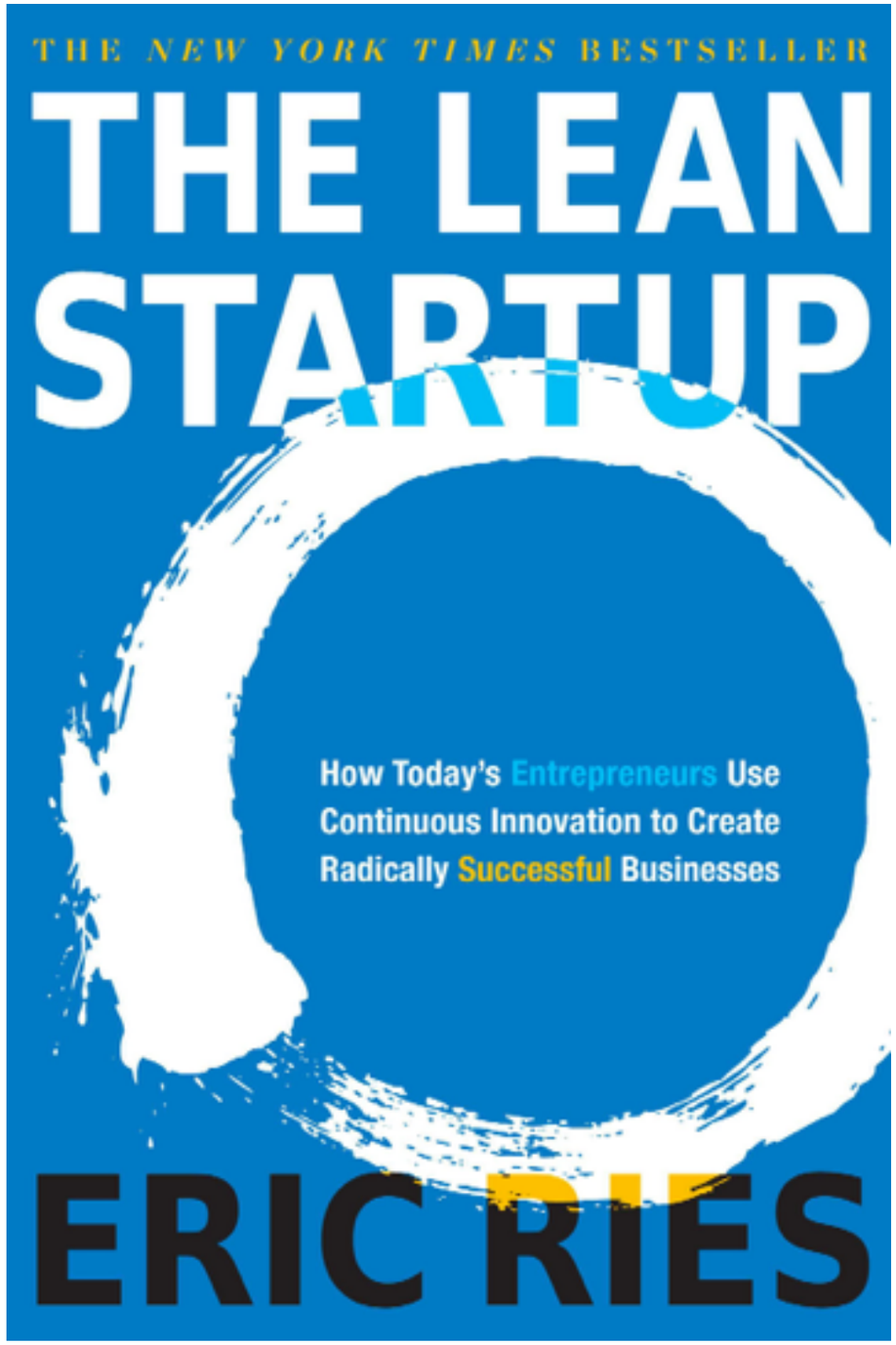
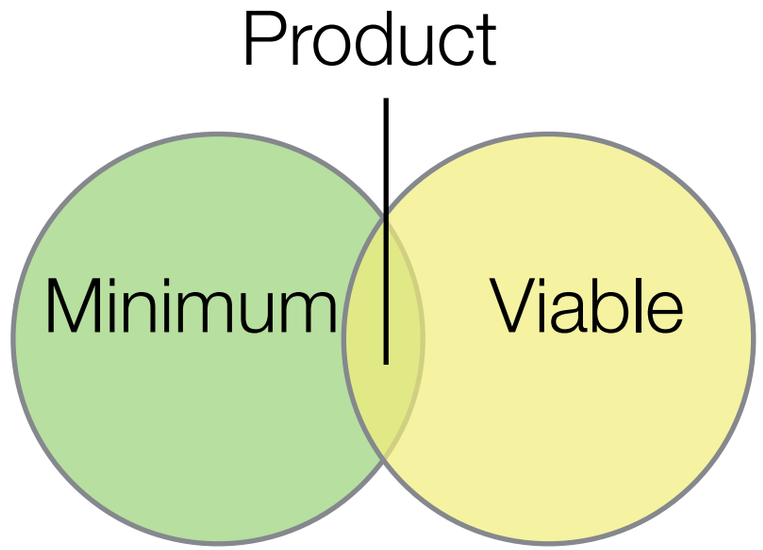
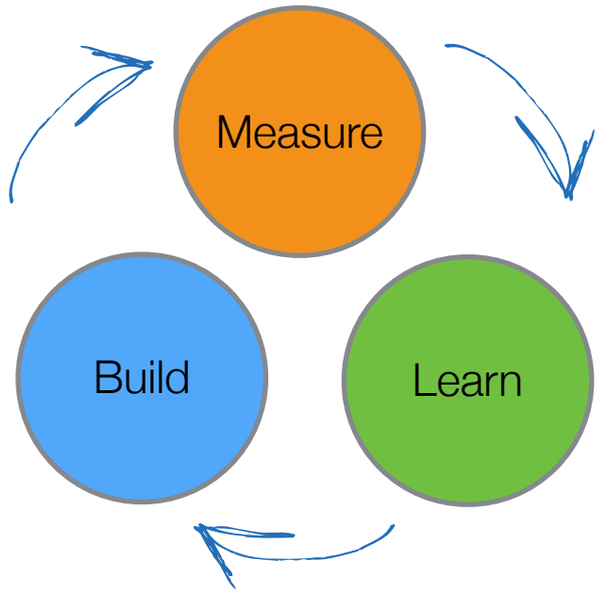
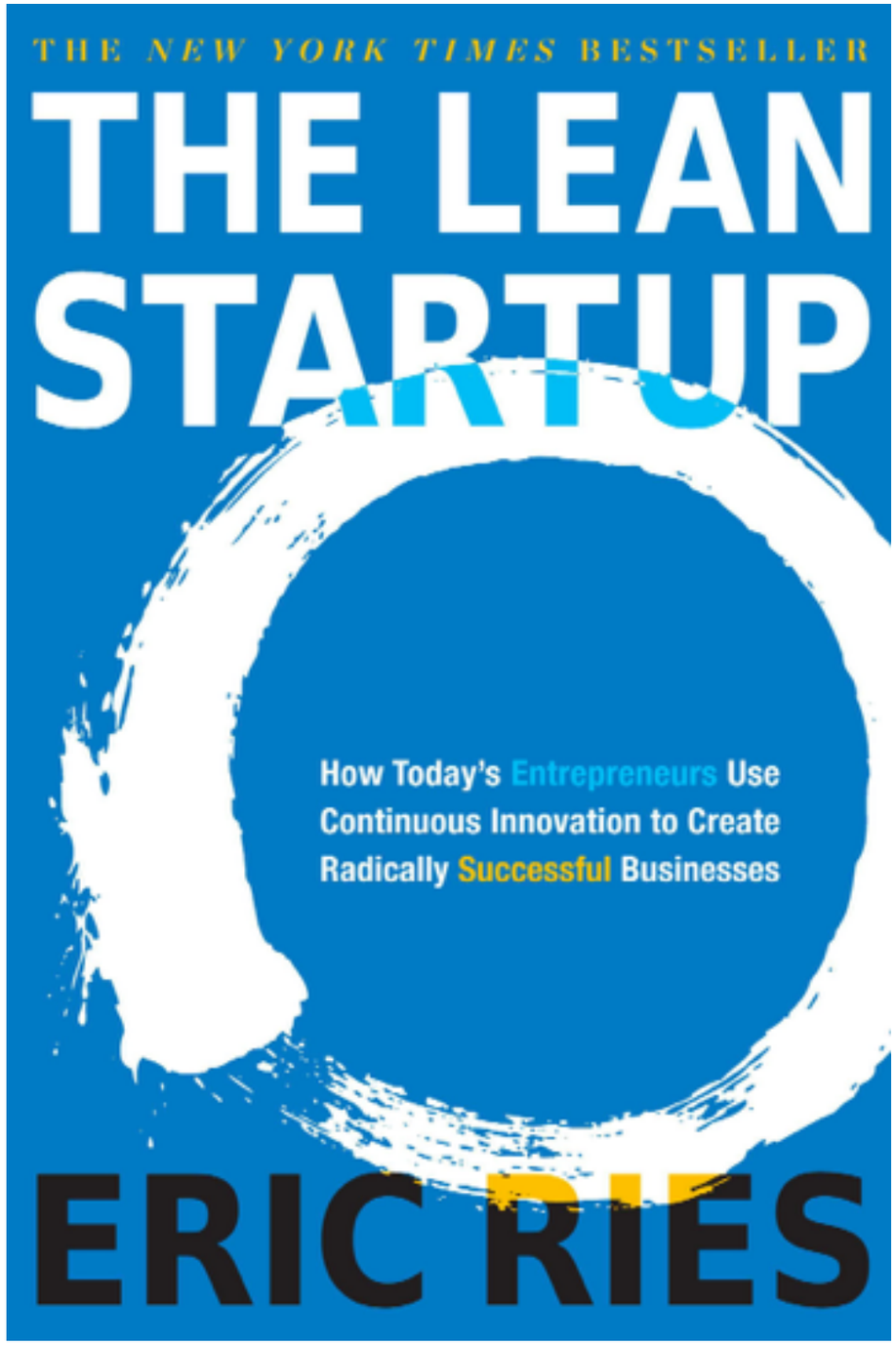






Feedback Loop

Embracing "Lean"



"GOOB"

Embracing "Lean"

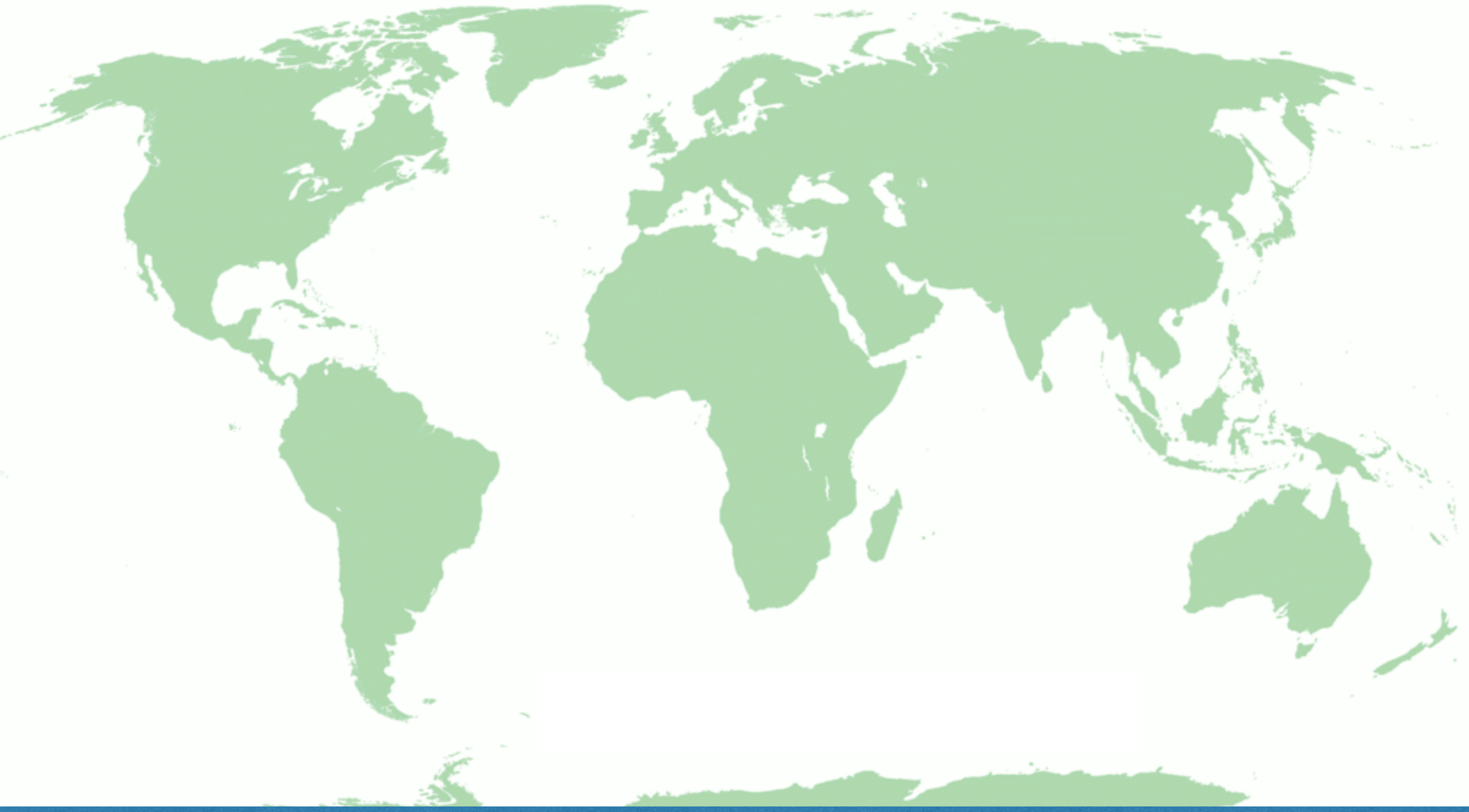
“GOOB” = Get out of the Building

“GOOB” = Get out of the Building

Cruzioworks

NextSpace

“GOOB” = Get out of the Building



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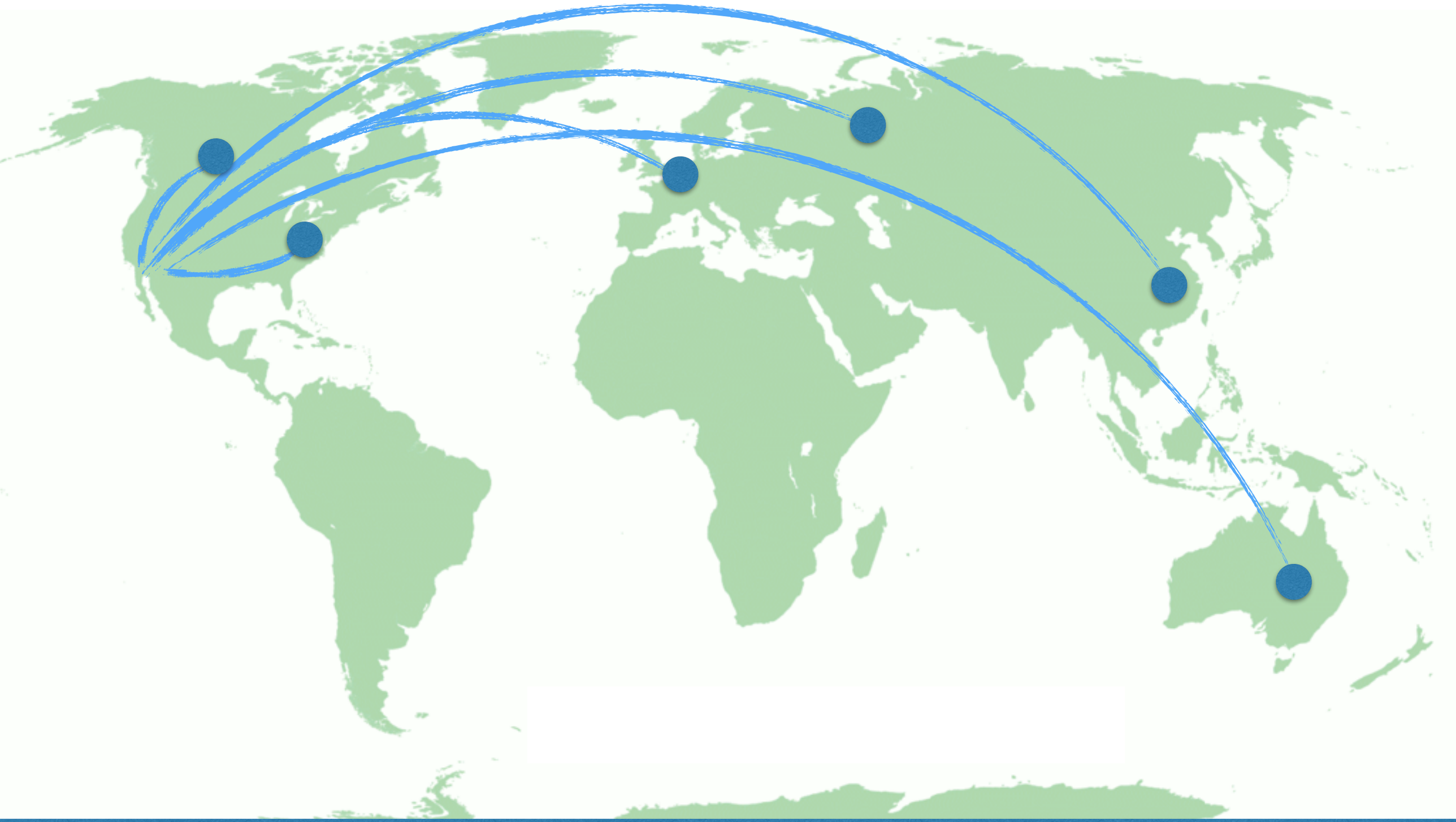

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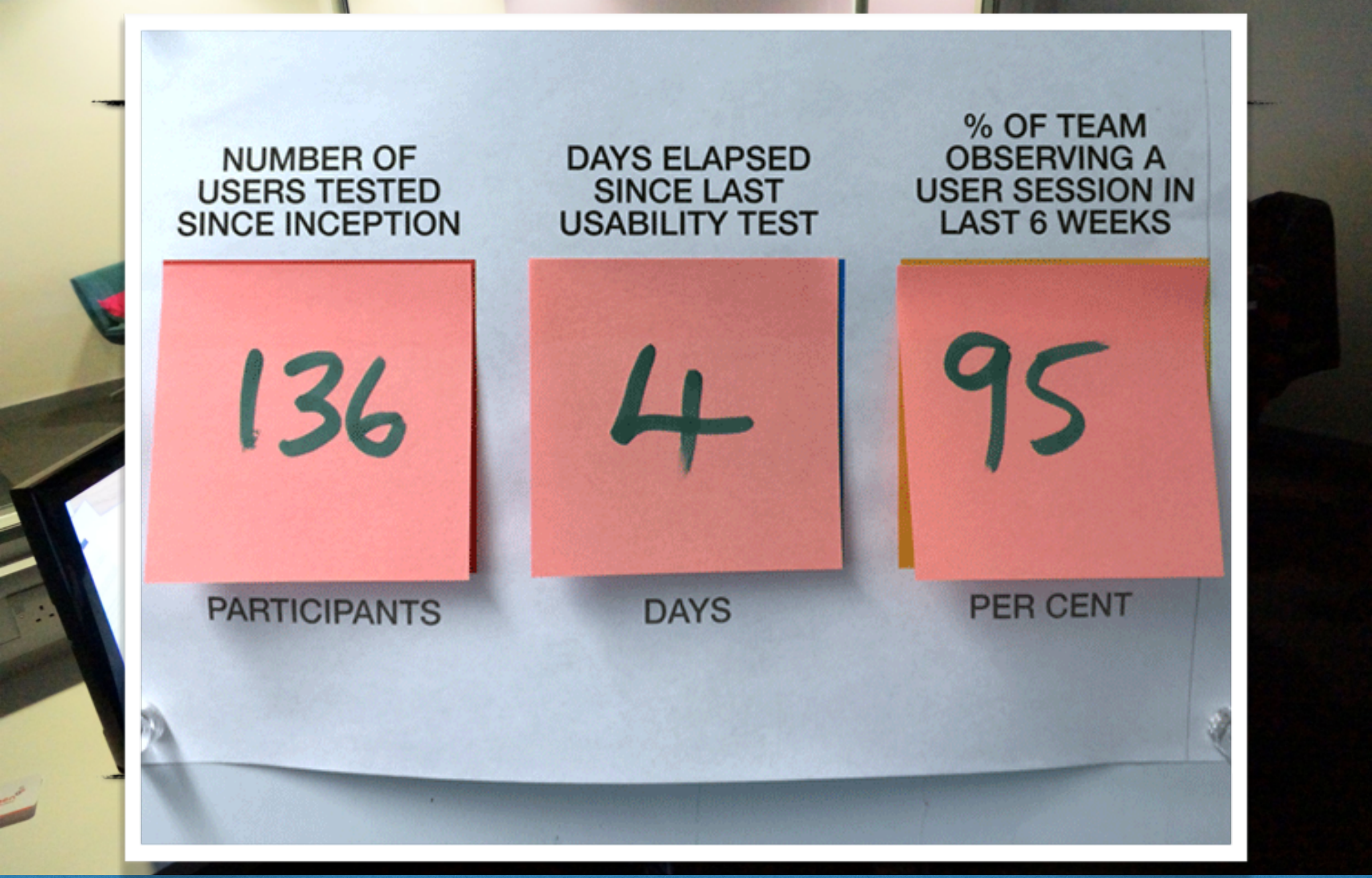
Team Engagement

Team Engagement



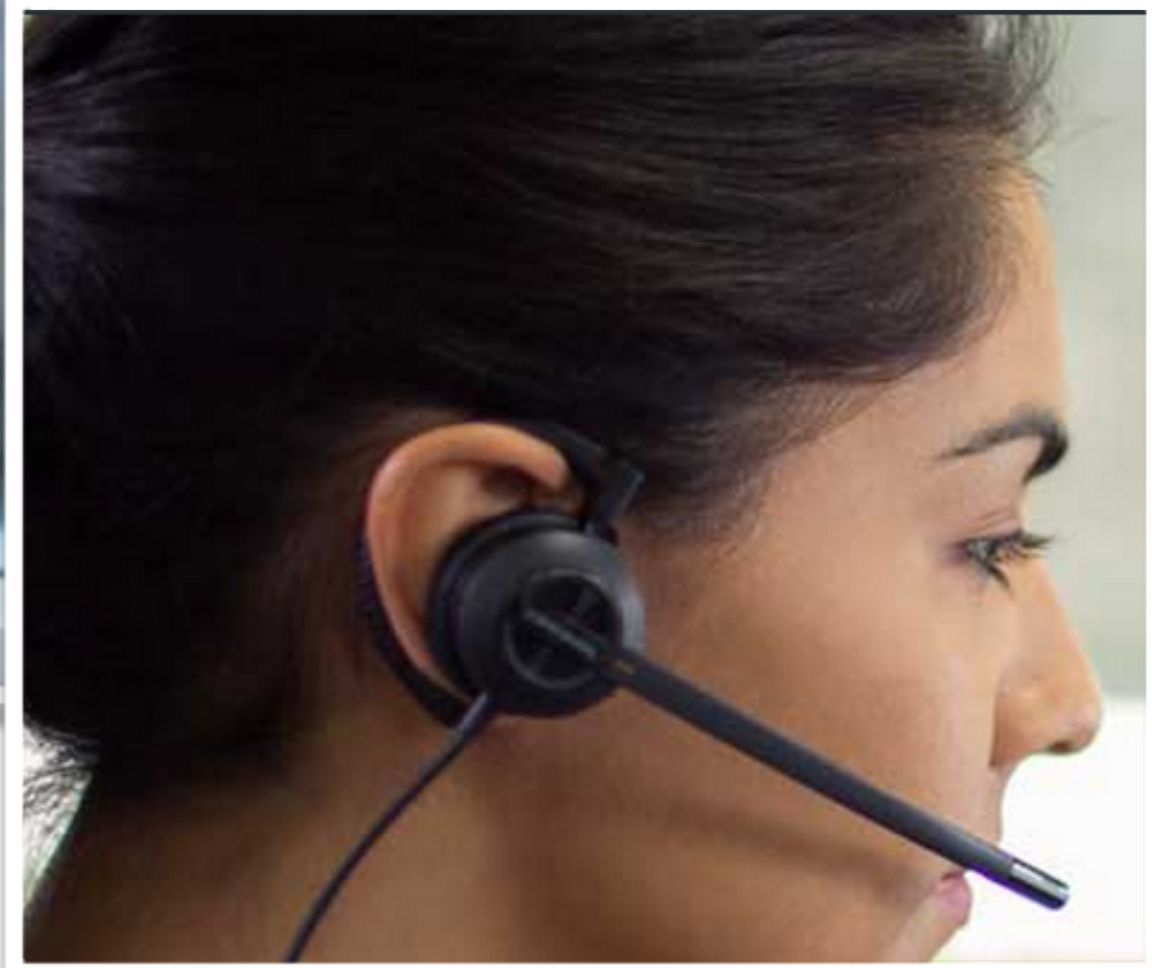
Team Engagement

UX Research @PLT

Deutschemark

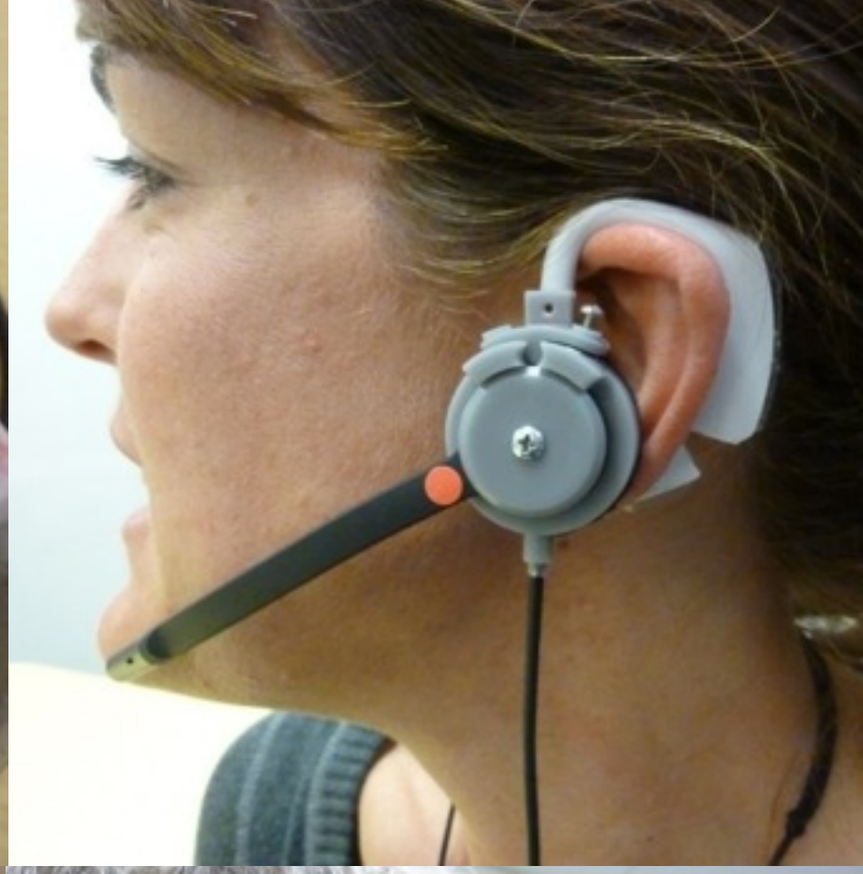
plantronics
L
R

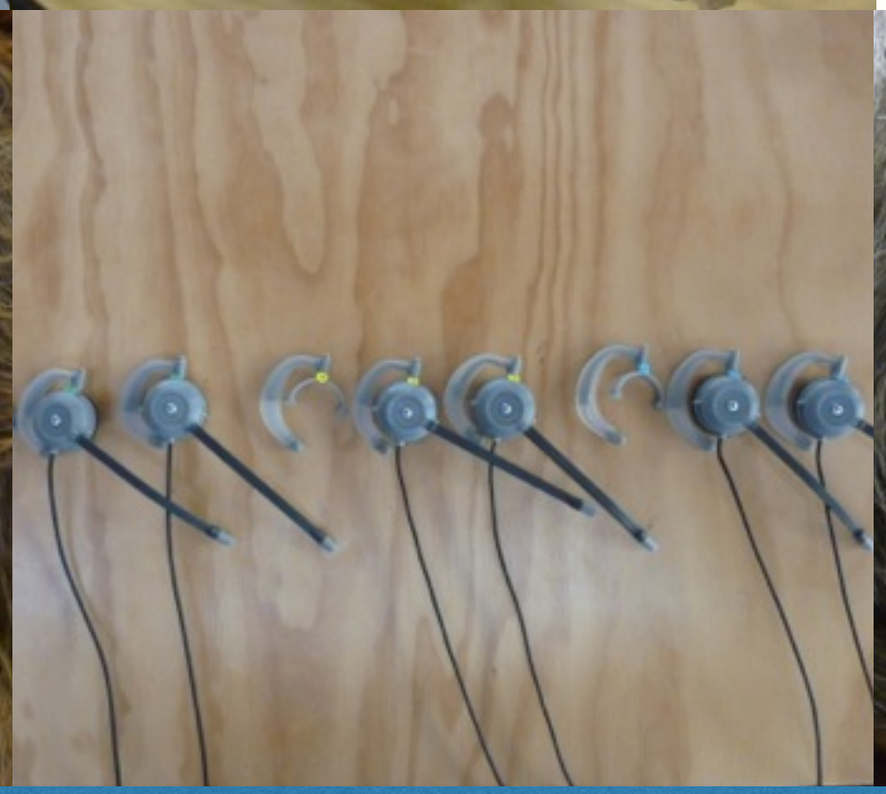
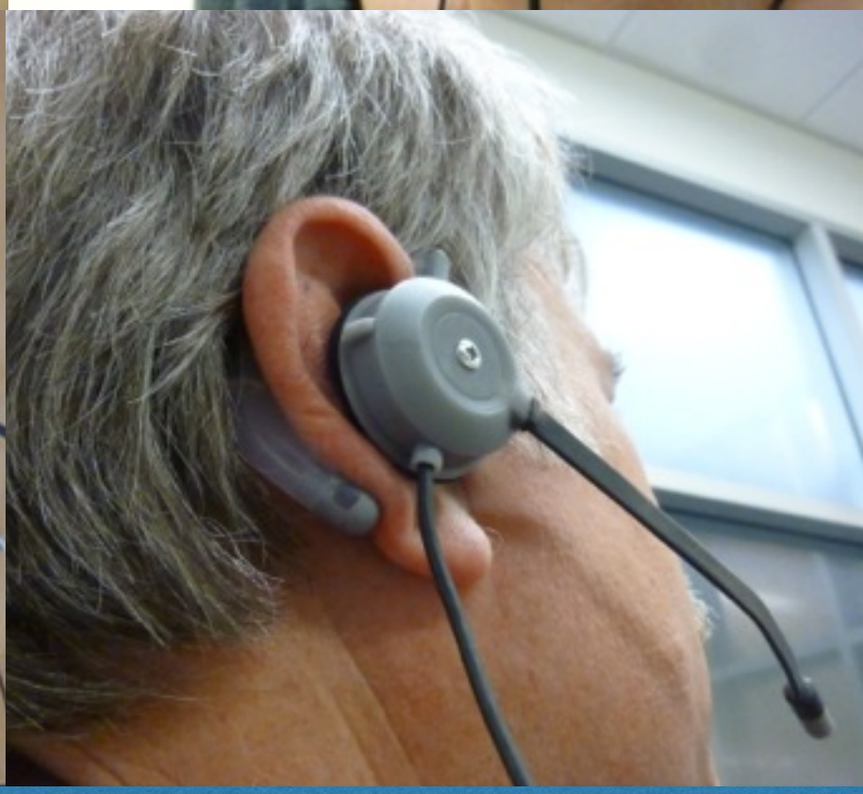
plantronics



Rounds of HF Testing: 7

Photos Analyzed: 1500



Photos Analyzed: 1500

CAPSULE micboom assembly

a **Mic boom > limited rotation:**
angle = 270°
(between harstops)

b **Boom rotation > static torque:**
pre-cycle torque = 2.7 Ounce*inch
(max 3.5*inch/min 1.89*inch)

c **RTV plug:**
flush to 0.15mm sub-flush
(not proud of mic boom surface!)

d **Gap between boom hub/capsule:**
max = 0.35mm

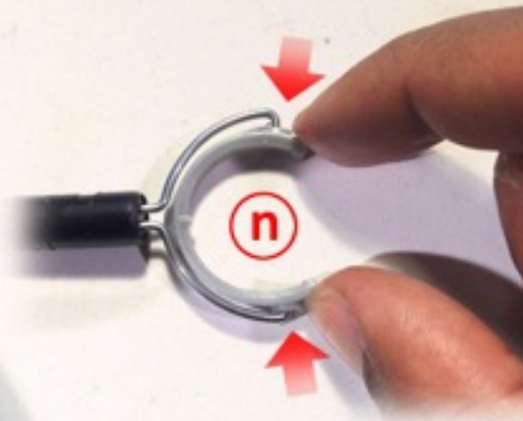
OTE over-the-ear

e **C-clip > earloop pivot:**
torque = **4 Ounce*inch** (max 5/min 3)

f **C-clip > removal force:**
acceptable limits = 2.56 lb max/2.48 lb min

g **Earloop > over-ridable hard stop angle:**
angle = **2°** either side (facing towards ear)
torque = **8.2 Ounce*inch** (max 10.6/min 5.74)

OTH over-the-head



h **Headband tube > yolk assembly:**
recommended torque = **1.35 Ounce*inch**(max 1.89/min 0.81

i **metal wire pivot > c-clip:**
recommended torque = zero (natural friction)

j **Headband length:**
max extension =245.8mm/min retraction = 195mm
length of headband travel = **50.8mm**
extraction/retraction force = **?**

k **Reveal line between headband tube & yoke shaft:**
nominal = **0.25mm** (max.0.4mm)

l **travel (wobble) between overmolded yoke & shaft:**
maximum travel = **0.15mm**

m **C-clip removal force:**
maximum = **3.15 lb /2.8 lb** minimum

n **C-clip to wire non-removal**
max force = **?**

BTN behind-the-neck

o **c-clip pivot:**
recommended torque = **2.7 Ounce*inch** (max 3.51/min 1.89

p **chicane sleeve:**
insertion & removal force = max 7.2 lbf/ min 5.2 lbf

q **Neckband stem;**
max hard stop height = **1mm**

r **c-clip removal force:**

OOBE Testing

Over the Ear

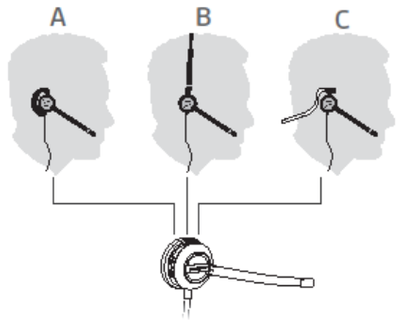
Over the Ear

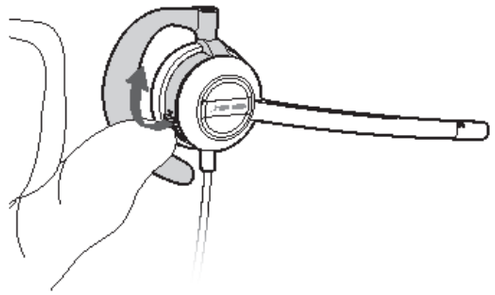
EncorePro 540/540D

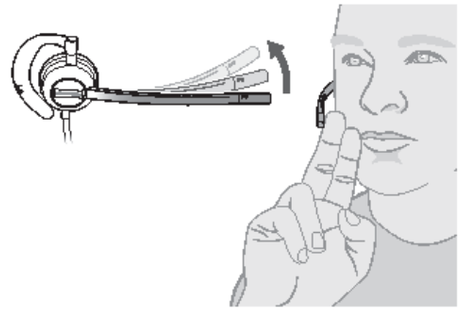
Designed in Santa Cruz, California

QUICK START GUIDE

plantronics.







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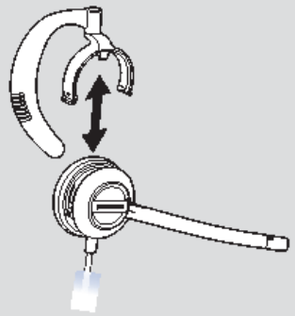

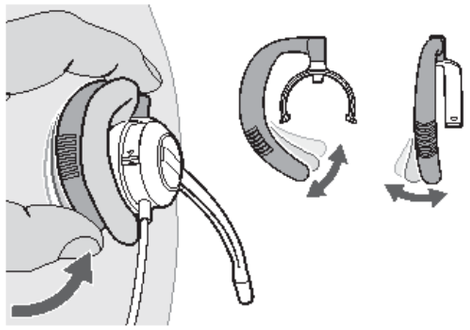

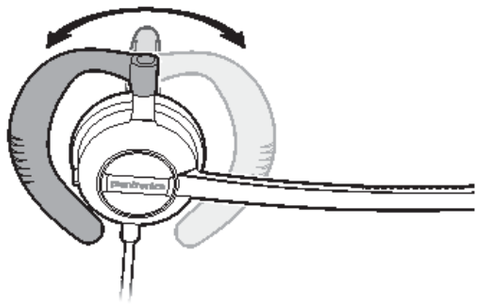

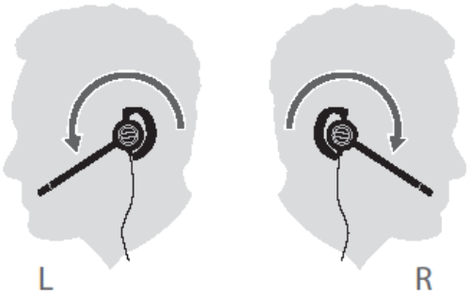

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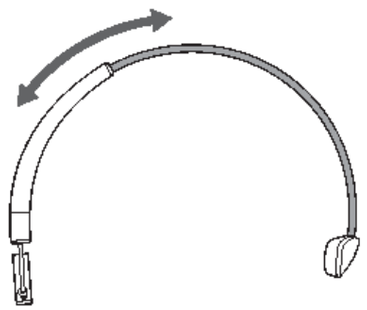

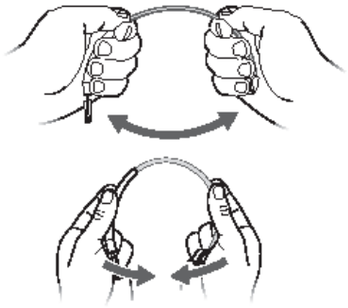

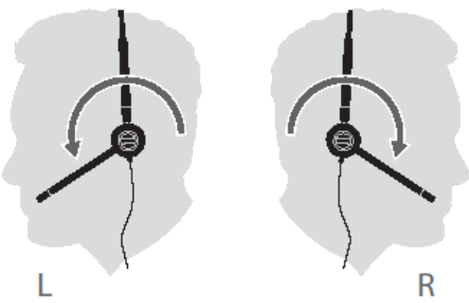

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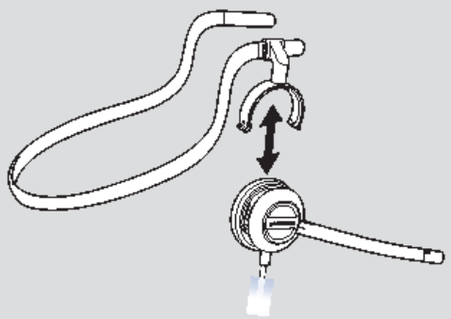
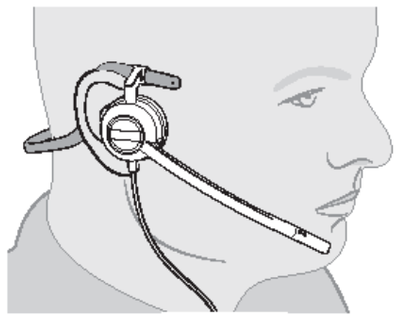
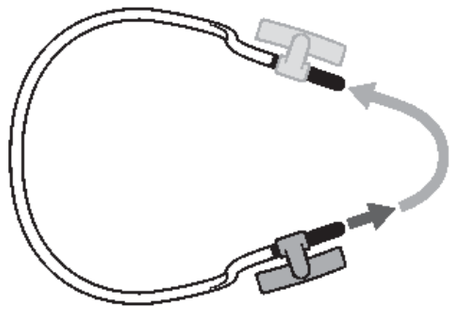
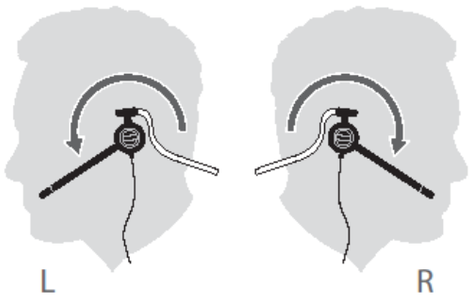


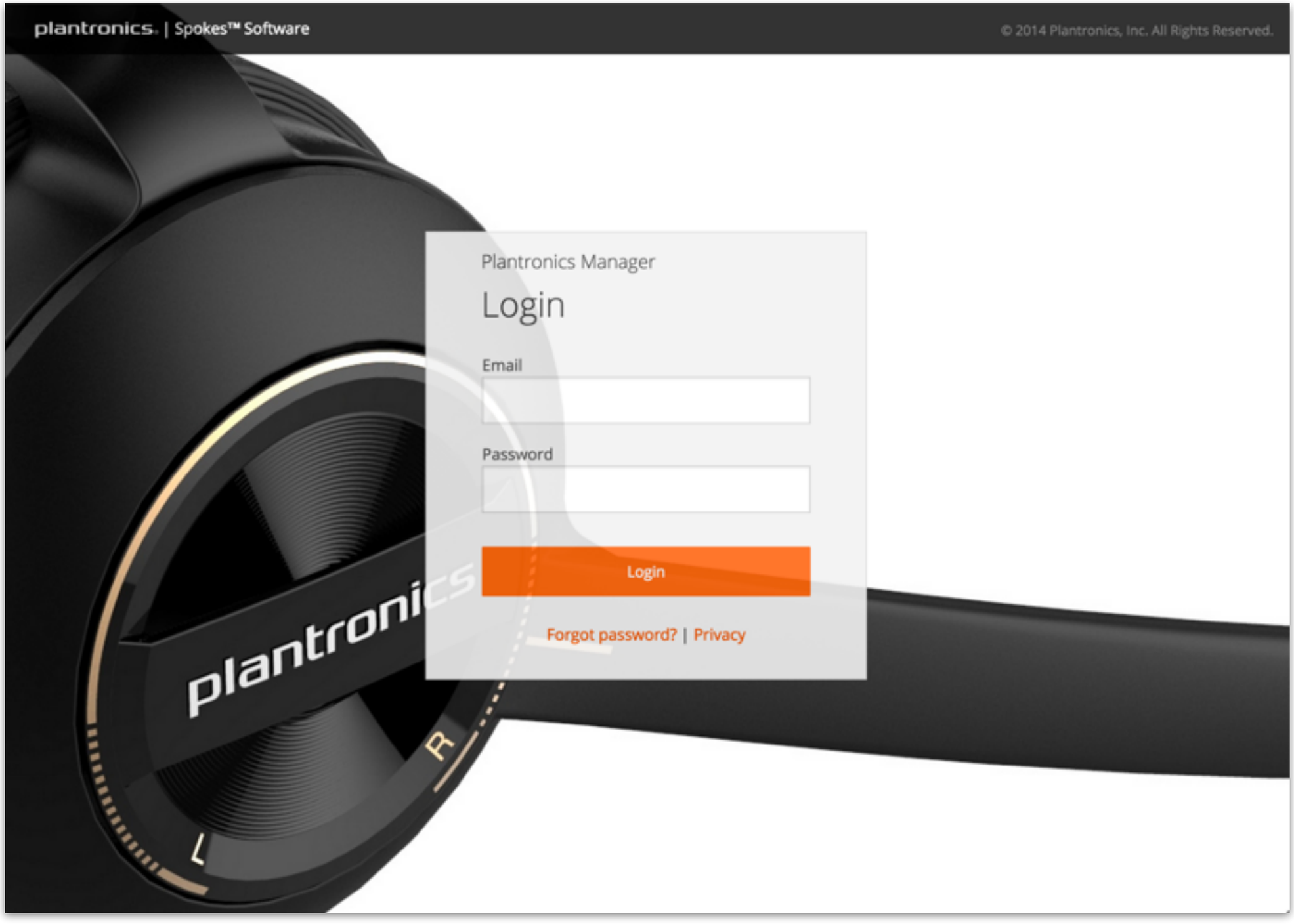


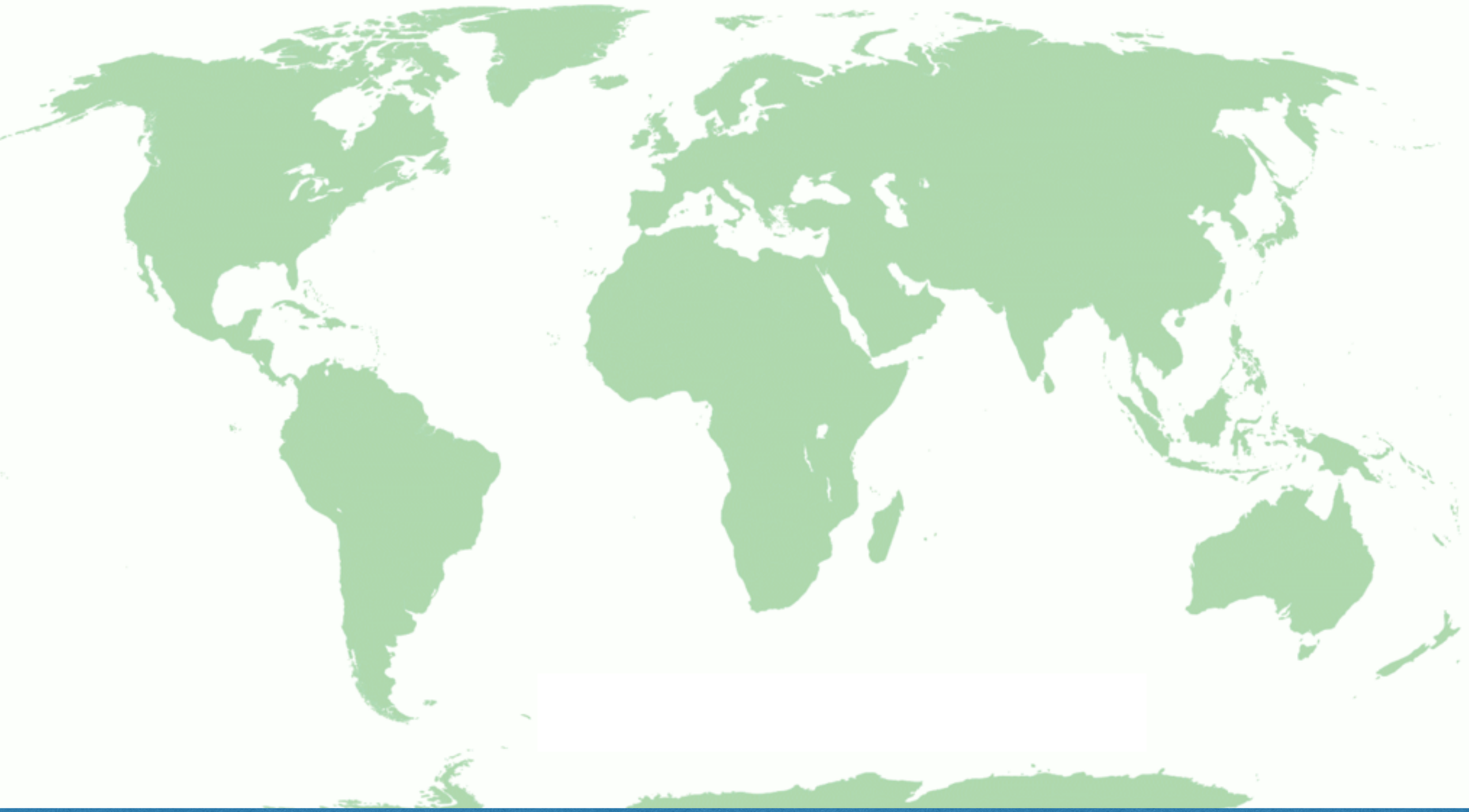




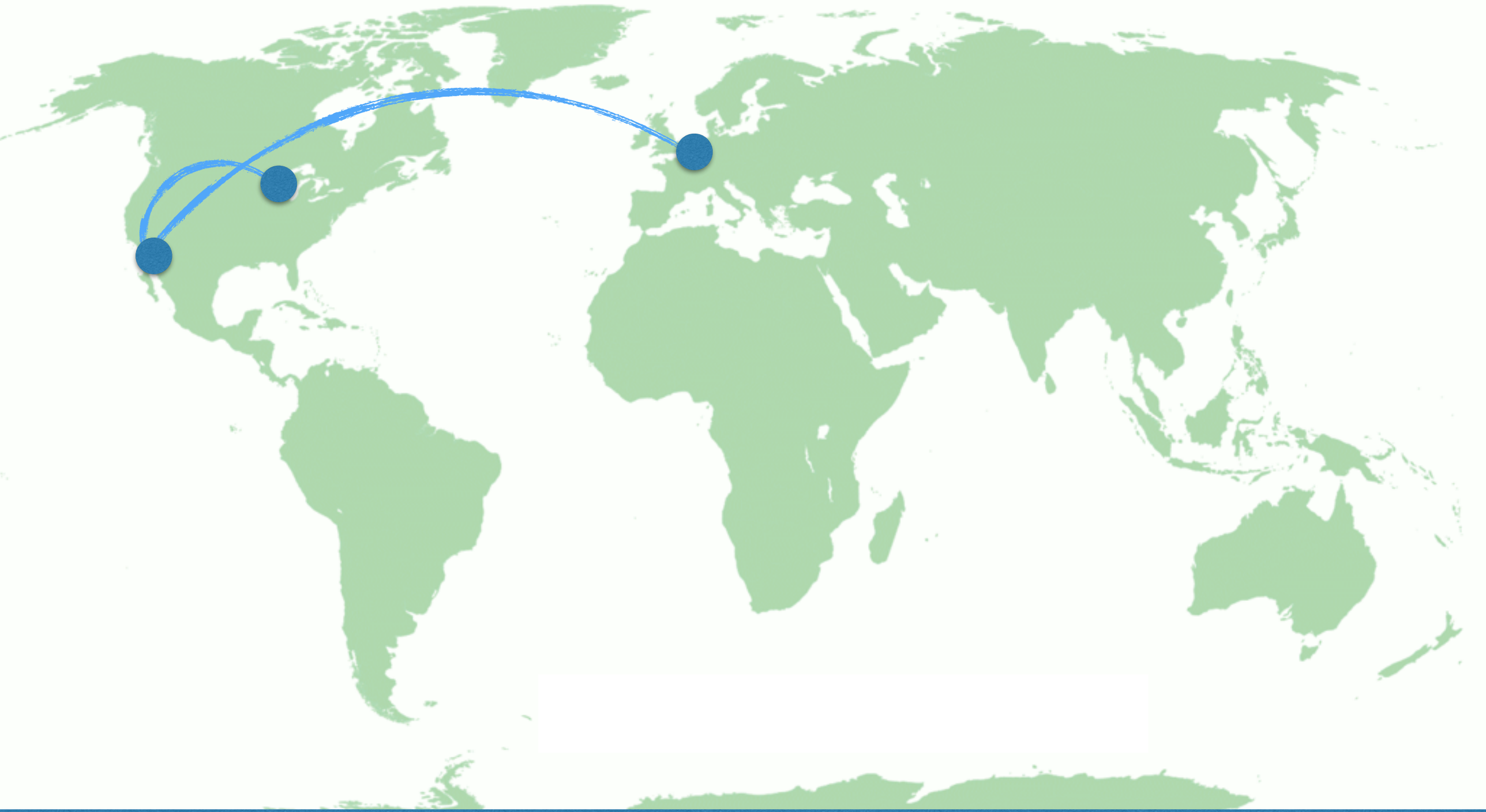
Insights to Action

Plantronics Manager





Remote Usability Research



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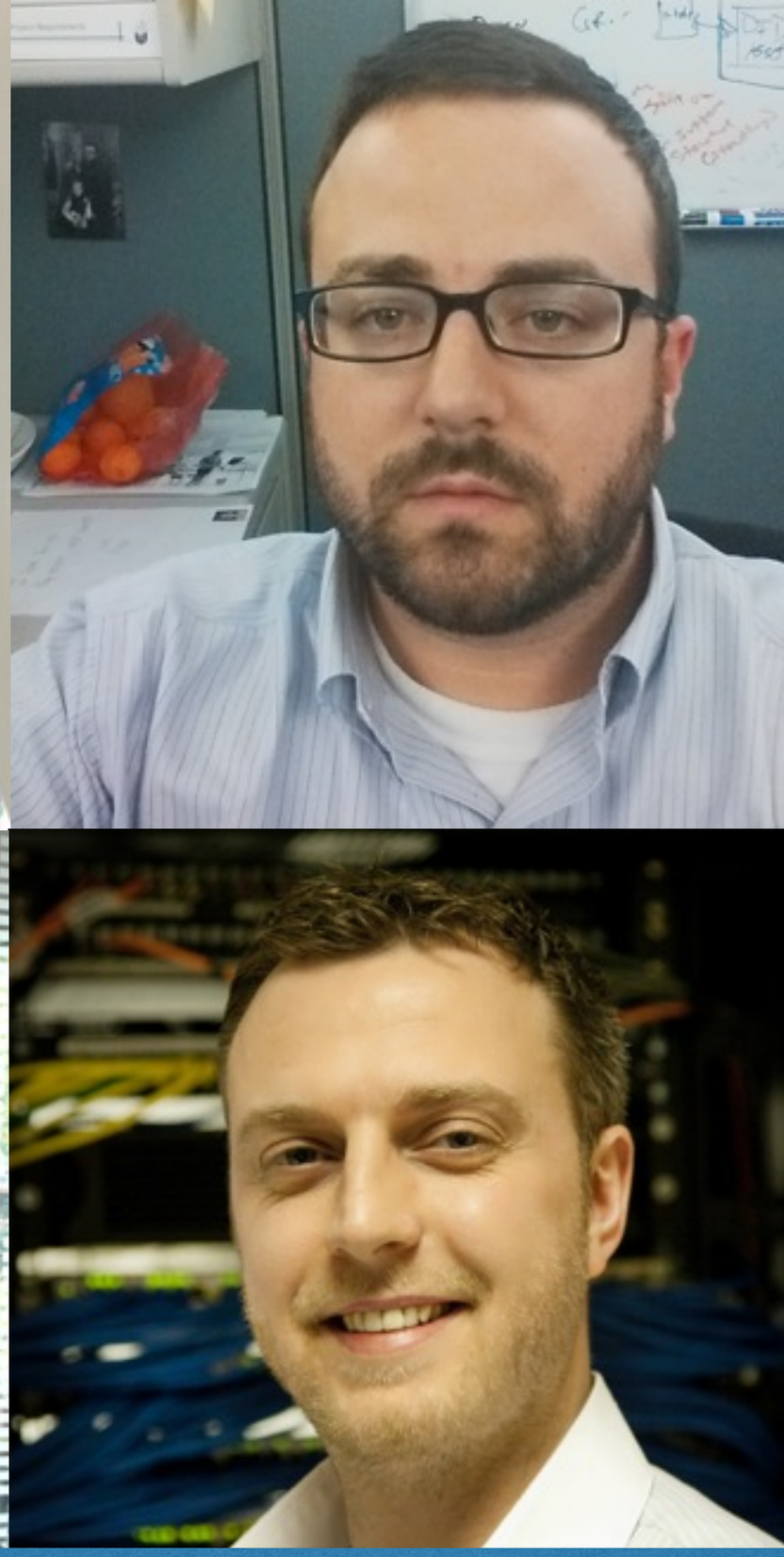

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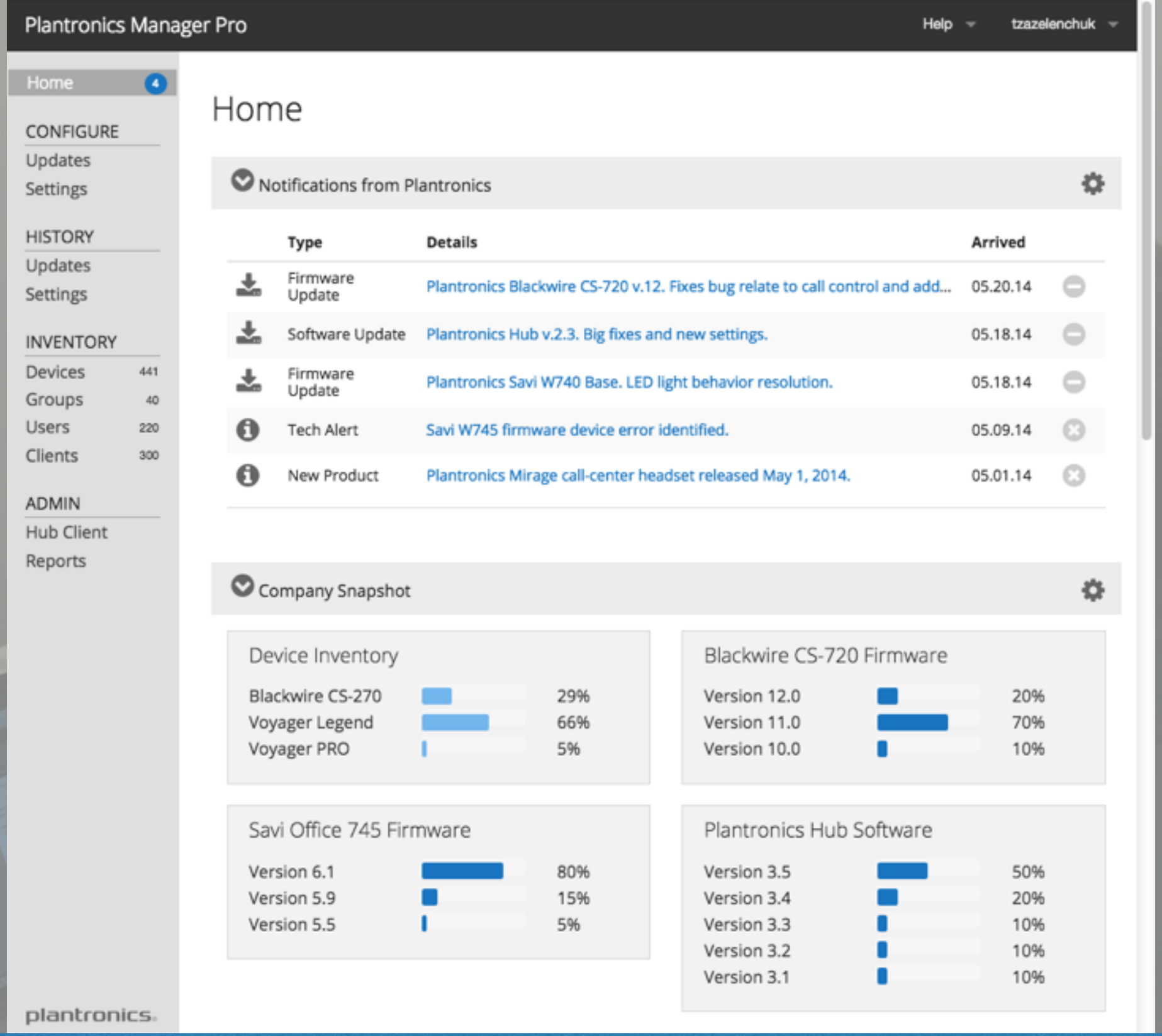

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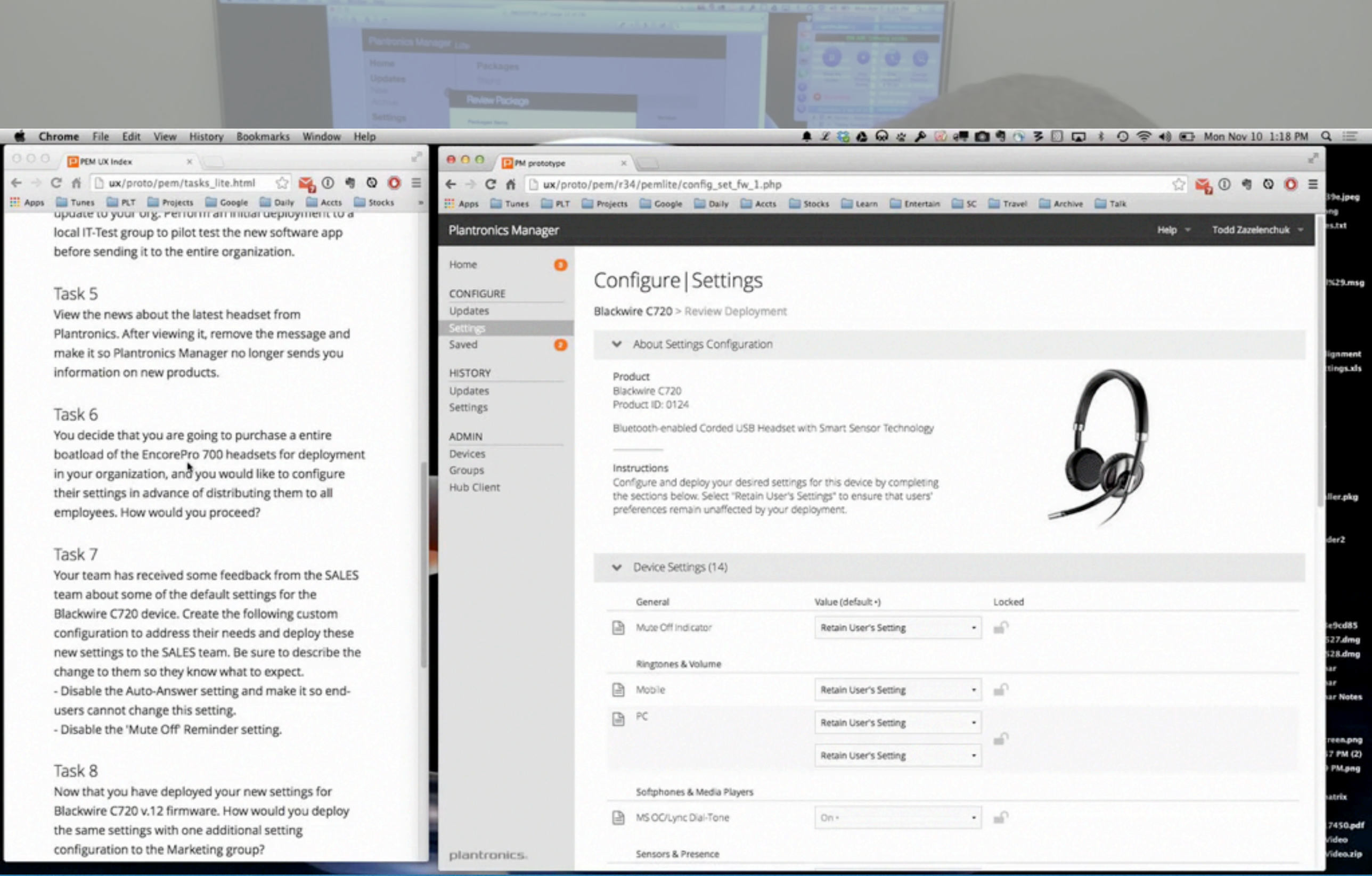

Remote Usability Research

Task List

local IT-Test gro to pilot test the new software app before sendin to the entire organization.

Task 5

View the news about the latest headset from Plantronics. After viewing it, remove the message and make it so Plantronics Manager no longer sends you information on new products.

Task 6

You decide that you are going to purchase a entire boatload of the EncorePro 700 headsets for deployment in your organization, and you would like to configure their settings in advance of distributing them to all employees. How would you proceed?

Task 7

Your team has received some feedback from the SALES team about some of the default settings for the Blackwire C720 device. Create the following custom configuration to address their needs and deploy these new settings to the SALES team. Be sure to describe the change to them so they know what to expect.
- Disable the Auto-Answer setting and make it so end-users cannot change this setting.
- Disable the 'Mute Off' Reminder setting.

Task 8

Now that you have deployed your new settings for Blackwire C720 v.12 firmware. How would you deploy the same settings with one additional setting configuration to the Marketing group?

Plantronics Manager

Home

CONFIGURE
Updates
Settings
Saved

HISTORY
Updates
Settings

ADMIN
Devices
Groups
Hub Client

Configure | Settings

Blackwire C720 > Review Deployment

About Settings Configuration

Product
Blackwire C720
Product ID: 0124

Bluetooth-enabled Corded USB Headset with Smart Sensor Technology

Instructions
Configure and deploy your desired settings for this device by completing the sections below. Select "Retain User's Settings" to ensure that users' preferences remain unaffected by your deployment.

Device Settings (14)

General	Value (default •)	Locked
Mute Off Indicator	Retain User's Setting	
Ringtones & Volume		
Mobile	Retain User's Setting	
PC	Retain User's Setting	
	Retain User's Setting	
Softphones & Media Players		
MS OC/Lync Dial-Tone	On •	
Sensors & Presence		

Remote Usability Research

Task List

Prototype

Chrome File Edit V

Mon Nov 10 1:18 PM

PEM UX Index

ux/proto

Apps Tunes PLT ects Google Daily Accts Stocks

update to your ... perform an initial deployment to a local IT-Test gro... to pilot test the new software app before sendin... to the entire organization.

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PM prototype

ux/proto/pem/r34/pemlite/config_set_fw_1.php

Apps Tunes PLT Projects Google Daily Accts Stocks Entertain SC Travel Archive Talk

Plantronics Manager

Help Todd Zazelenchuk

Home 3

CONFIGURE
Updates
Settings
Saved 2

HISTORY
Updates
Settings

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Configure | Settings

Blackwire C720 > Review Deployment

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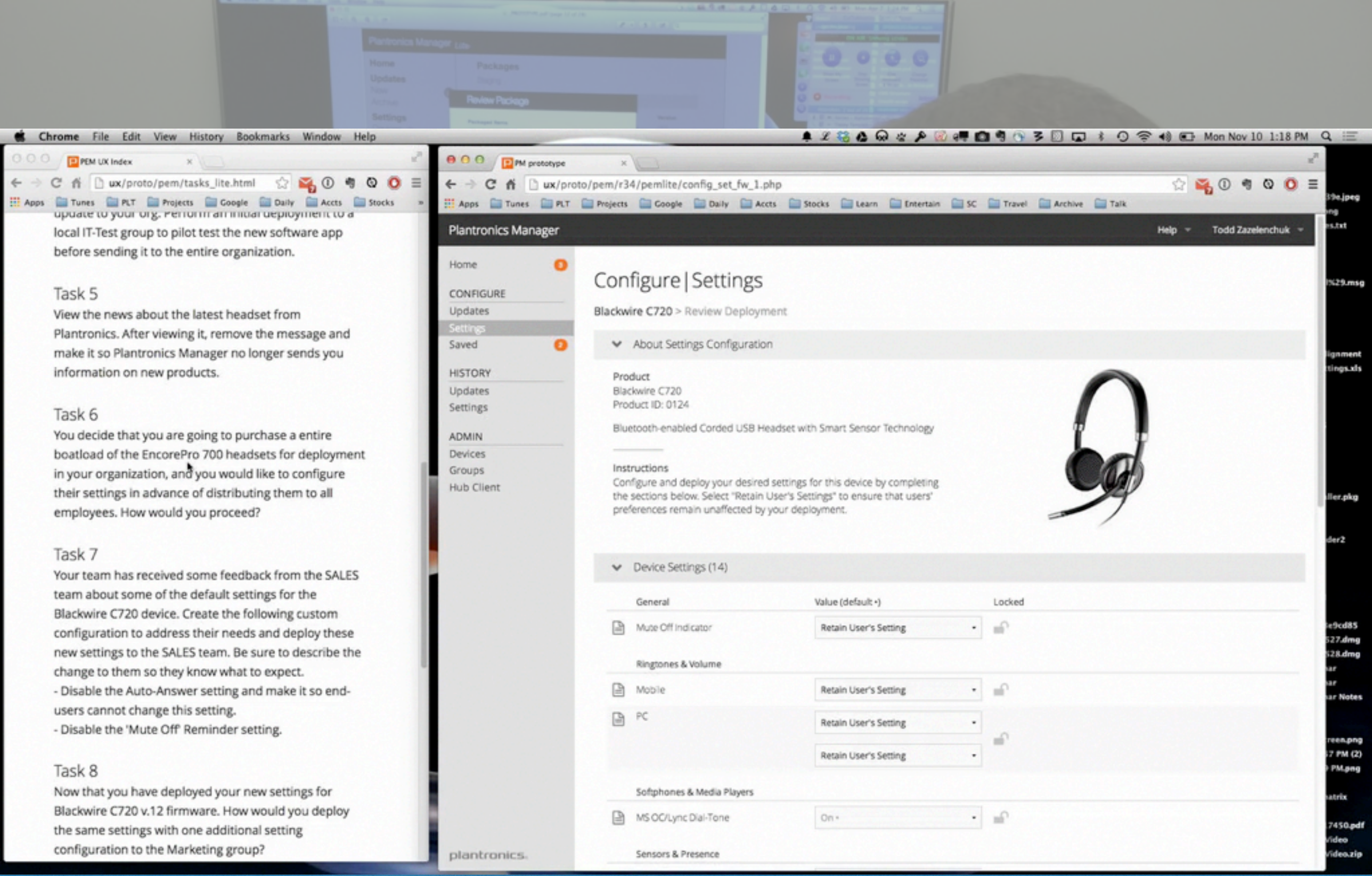
plantronics.

Remote Usability Research



Remote Usability Research

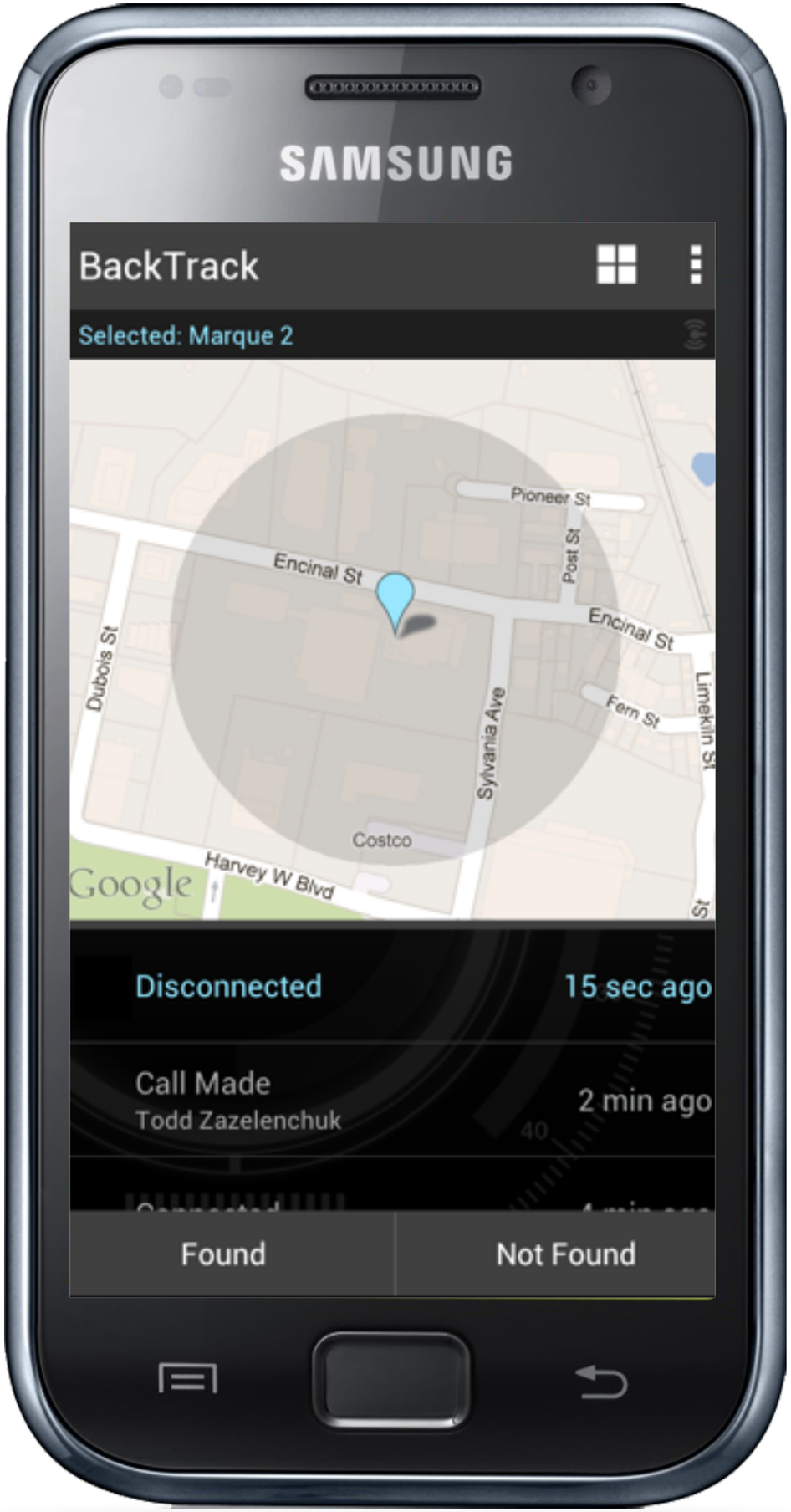
Find MyHeadset

Do users value knowing how quickly they found their headset?

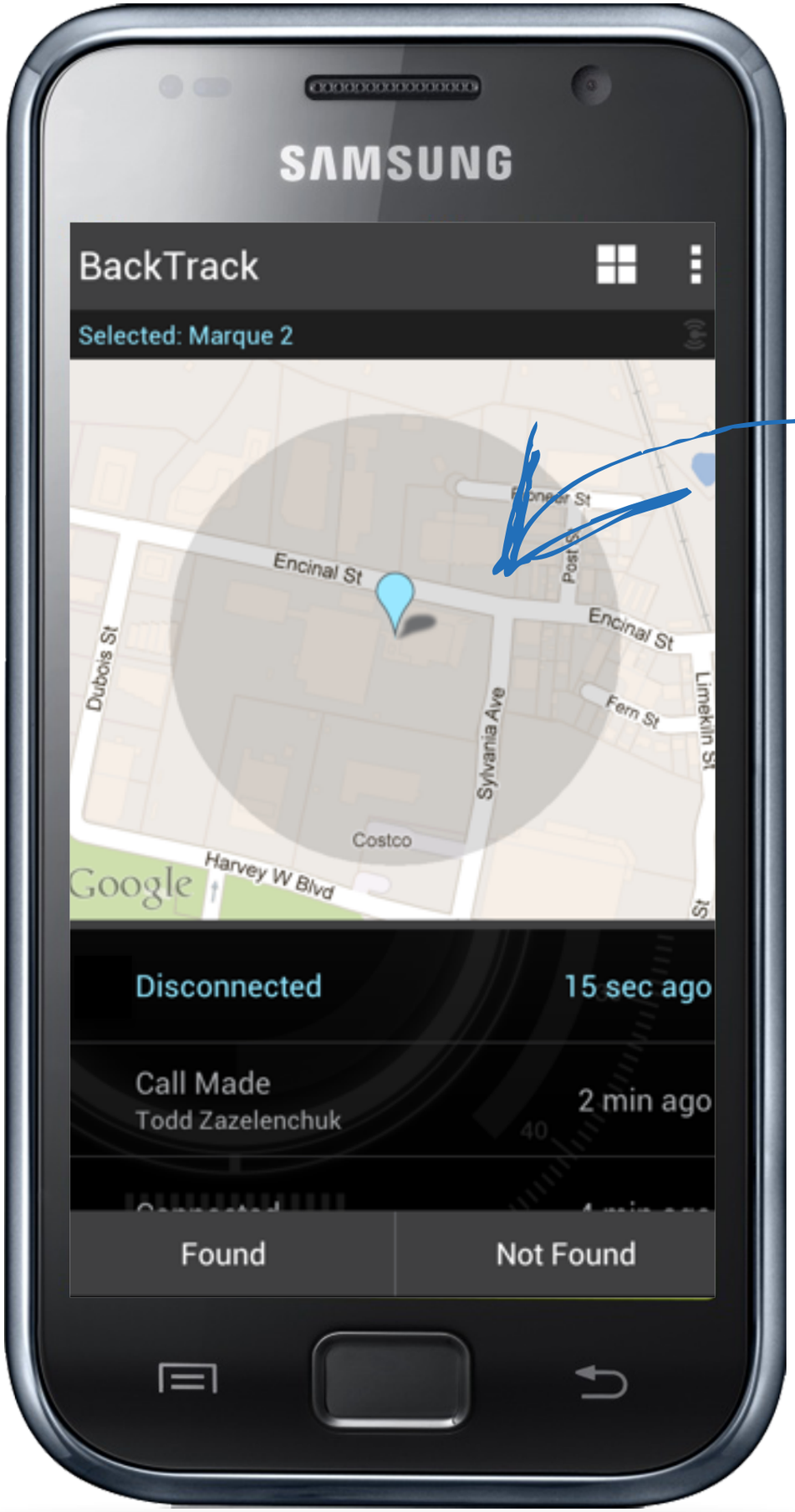
Do users value knowing how quickly they found their headset?

Do users value knowing how quickly they found their headset?

After finding their headset, do users complete the activity or simply exit the app?



Do users understand the relationship between the map pin and the event list?



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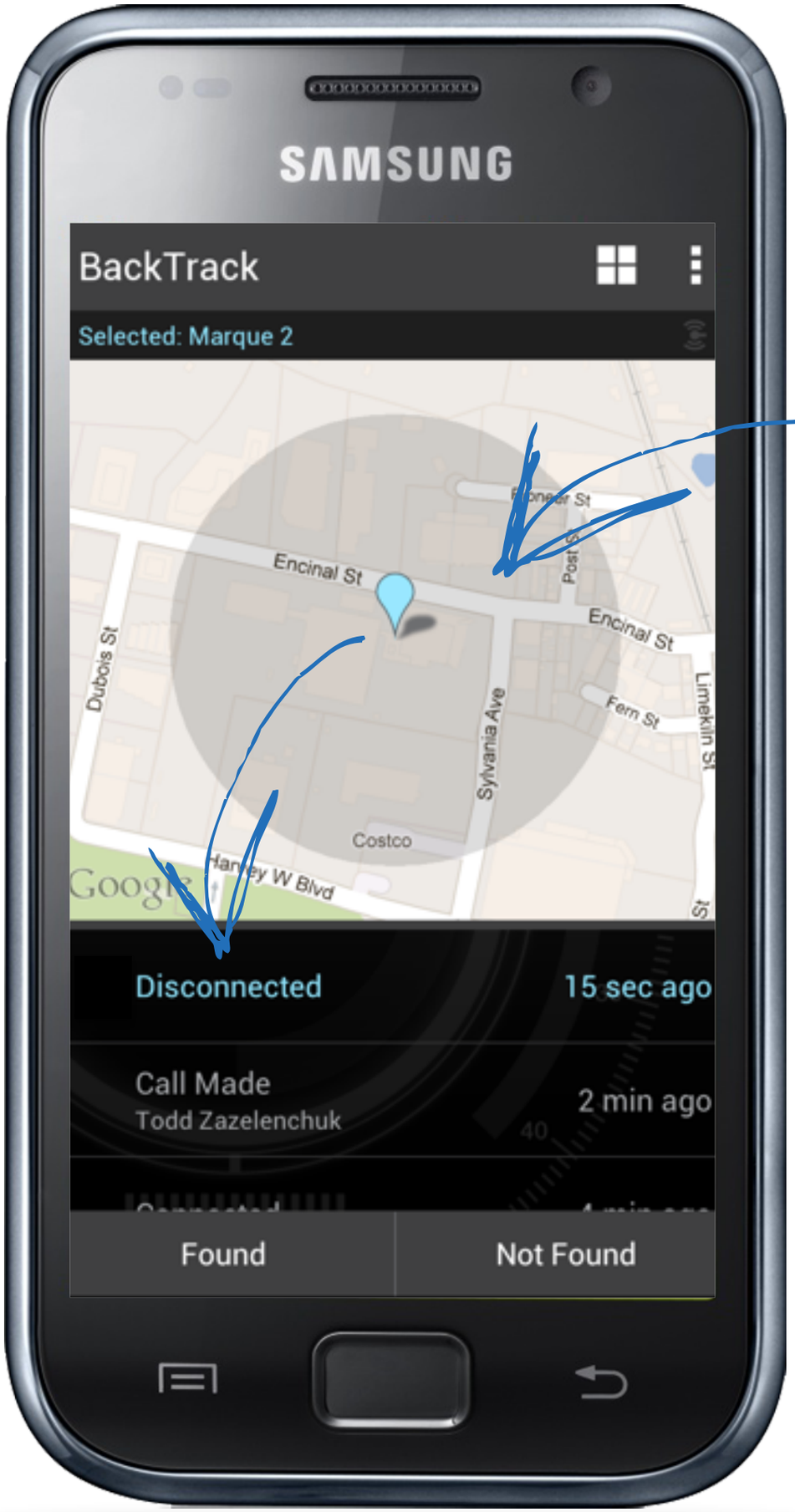

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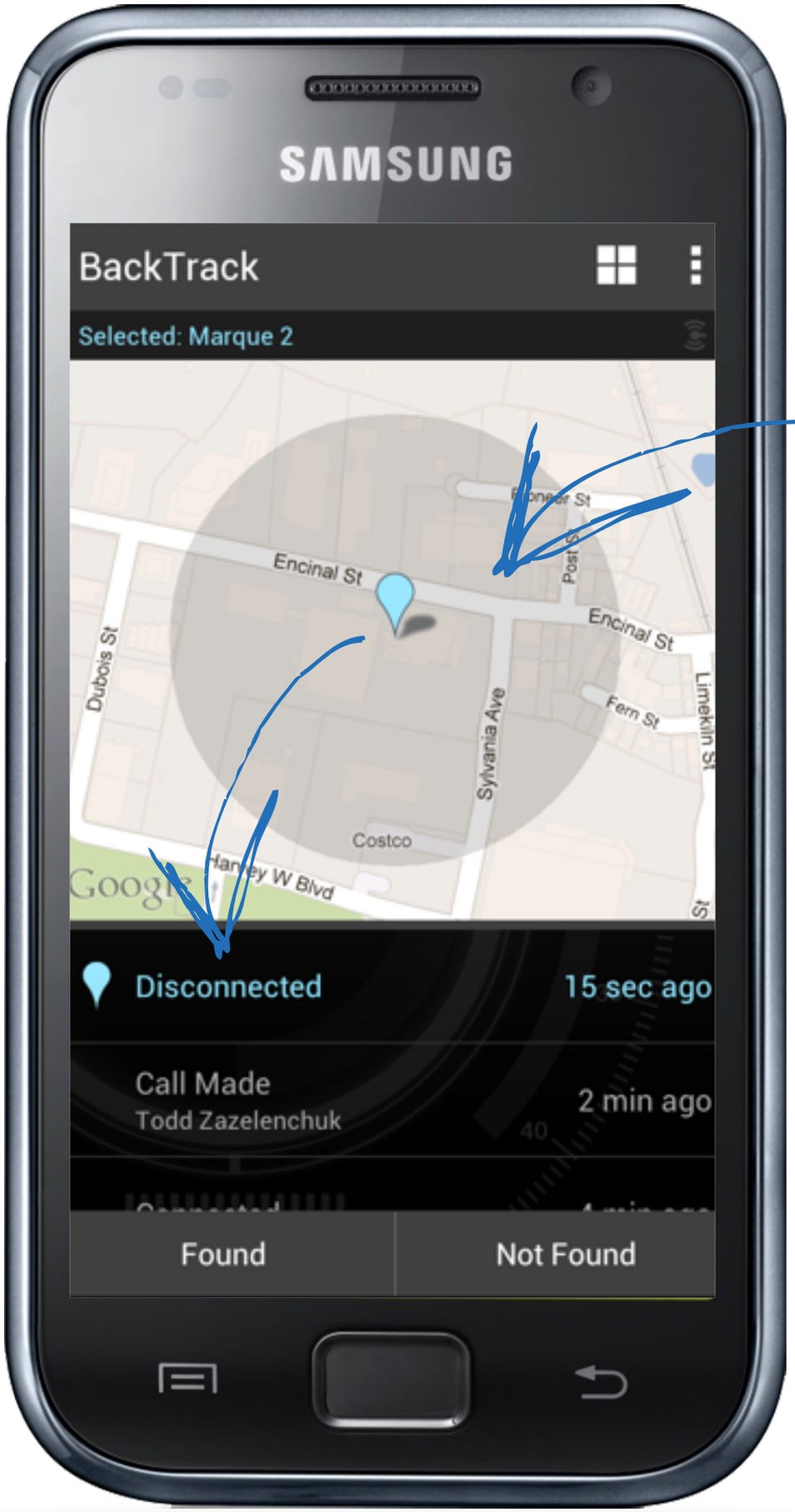

Do users understand the relationship between the map pin and the event list?

Play Store Reviews

Play Store Reviews

★★★★★ **Jerry Terry** on **Mar 26, 2015** at **8:18 PM**

Lifesaver, great app! I was literally 2 feet away from my headset and could not find it. I sent a tone and **found it in 34 seconds**. It was laying under a magazine in my bathroom. Great app!

★★★★★ **Robert Linz on Feb 13, 2014 at 5:36 PM**

I used BackTrack to go to the last place I used my headset, then I sent a tone to find it in that room. I love Plantronics!

★★★★★ **Real Researchers** on **Jun 20, 2014** at **4:57 PM**

Lifesaver! Love it! Simple! Loud. Works! Makes the headset beep loud and tracks back its general location. Wonderful. **I would have paid for this app.**

The Take-Aways…

☑ Observe first. Listen second.

The Take-Aways…

- ☑ Observe first. Listen second.
- ☑ UX Research ≠ Market Research

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The Take-Aways…

- ☑ Observe first. Listen second.
- ☑ UX Research ≠ Market Research
- ☑ Research is a *process*
- ☑ GOOB
- ☑ Get engaged!

The Take-Aways…

Thank you!

Matt Mainini & Todd Zazelenchuk

plantronics | DESIGN