

ENGINEERING EXCELLENCE UX TALK

International UX Research Best Practices

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Overview

WHAT I WILL BE COVERING

- About this Talk
- Introducing myself
- Why International UX?
- International UX Research myths
- International UX Research processes/ practices
 - Phase 1 – PLAN
 - Phase 2 – EXECUTE
 - Phase 3 – COMMUNICATE

About this Talk

I HOPE THIS TALK WILL HELP YOU

- Provide very practical information
 - The focus is on “how to” information and tips & tricks with many examples
- Geared toward UX & Product Development
 - Most of the examples are still relevant to other disciplines
- Solely based on my experience
 - Examples used in this presentation are primarily for Asia and Europe
- The Talk will cover the end-to-end UX Research process
 - From initiating the research to communicating the research results



Introducing myself

ABOUT ME AND MY WORK

- Intl UX Research projects conducted (50+)
 - Projects at Honda, Symantec, NNG, Sony, HP, and MS in last 15 years
- Countries/ Regions visited (12)
 - Japan, Korea, Singapore, Taiwan, China, UK, France, Germany, Holland, Italy, Spain, Switzerland
- Methods used (13)
 - Field site visits (in both consumer and enterprises), participatory design, competitive analysis, benchmark studies, in depth-interviews, usability lab studies, focus groups, customer segmentation analysis, OOB, ergonomics analysis, color-analysis, surveys
- Regional partners/ vendors worked with (34)
 - PC OEM Partners (Sony, Fujitsu, Hitachi, NEC, NTT Data), Remote Control manufactures (Philips, MSK, Ruwado)
 - Network Operators (EchoStar, T-Mobile Germany, Canel+, BSKyB, SwissCom, China Telecom, Reliance, Singtel)
 - Vendors (Synovate Germany, TNS Seoul/Taipei/Spain/Singapore, Acorn Korea/China, Human Factors International, U's Eyes, UPA China, Infoplan, Amberlight, System Concepts, User Focus, The Usability Company, Sugata Research, Human Interface, Dray & Associates)



Why International UX?

DO WE REALLY NEED TO DO THIS? YES!

- U.S design guidelines and usability facts might not apply in other countries due to **different habits and practices**
- We might be missing product opportunities because we are **unaware of the significance of cultural issues**
- It is difficult to get a complete picture only from Marketing quant data or fields/sales data **without knowing the whys**
- There is **a lot of revenue coming from outside** of North America (60%?)
- Many UX researchers are **not focusing on UX research world-wide**

International UX Research Myths

FIVE COMMON EXCUSES FOR NOT DOING INTL RESEARCH

1. *"It costs too much"*
 - *Not necessarily with the right approach*
2. *"It takes too long"*
 - *You could save time with the right approach*
3. *"I don't need to actually travel to do the study"*
 - *Without going, you will miss critical insights*
4. *"I won't get actionable data"*
 - *You'll surprised how much you can get out of it*
5. *"My manager would never approve this"*
 - *You need be patient to make a case - he or she will approve it with the right ROIs*

PHASE 1: PLAN

PLAN WELL TO EXECUTE SUCCESSFULLY

PHASE 2: EXECUTE

BE FLEXIBLE BUT FIRM ABOUT WHAT TO WANT

PHASE 3: COMMUNICATE

SHARE SMART, SPREAD WIDE

PLAN

WHAT TO PLAN IN PHASE 1

1. Have Good Research Questions + ROIs
2. Ask for Budget
3. Select a Target Country
4. Select a Type of Research
5. Decide on the Duration/ Timing
6. Select Vendors (RFQ, SOW, POs)
7. Recruit, Translate materials
8. Decide on facility, NDA
9. Plan on Travel



1. Have Good Research Questions + ROIs

Do you have good research questions with good business justifications?

1. Have brief meetings with the key stakeholders to come up with **good research questions and ROIs together**
2. Identify international **UX research questions**, ideas, focus areas, and target countries
3. Think about how the research results can **make an impact** on product development
4. Once you collected RQs and ROIs, **create a pitch deck** to present to your managers and key stakeholders
 - You don't know where the budget is coming from (e.g., marketing, product team, or UX team)

Research Questions (example)

JAPAN VISUAL STUDIO ALM UX RESEARCH PROJECT (MAY, 2011)

■ Sample Research Questions

- Why Application Lifecycle Management (ALM) is not selling well in Japan?
- What is a typical Japanese enterprise ecosystem (i.e., org structure, product, process, tools, teams, roles, career path) ?
- What are the common ALM scenarios in Japan?
- How do they use ALM features in Japan?
- Which current ALM features are desirable or not desirable to Japanese developers?
- What do they think about Cloud tools?
- What are the existing globalization issues in Japan?
- Do users' responses differ between the common end users vs. MVPs?
- How do they react to the Visual Studio new design & icons? Positive or Negative?



2. Ask for Budget

How much should I ask for?

- Depends on the research method
- Depends on the target countries
- Depends on the language you speak
- Depends on how involved a vendor will be
- Depends on how much you want to spend on:
 - Facility
 - Moderator
 - Translations and Interpretations
 - Recruiting and Gratuities
 - Data Analysis & Reporting



Budget (example)

JAPAN VISUAL STUDIO UX RESEARCH PROJECT (MAY, 2011)

- Japan Focus Groups ~20K (for vendor)
 - 3 focus groups
 - 2 locations (Tokyo and Osaka)
 - 2 set ups (vendor's lab and conf room)
 - A total of 6 end-users and 15 MVPs
 - Translations of materials – Word, PPT mockups
 - Post transcription
 - Facility – vendor's lab (2 nights)
 - Recruiting – 6 end users only
 - Incentives – 21 (including MVPs)
 - Moderator – technical moderator
 - Report – including market & data analysis
 - Travel – hotel, bullet train, setup, moderation
 - Refreshments – coffee & teas, dinner
 - Project management

JP Focus Groups Items	Unit Cost	Units	USD (\$)
Material Translations	1,000	1	1,000
Transcription Service	1000	3	3,000
Facility Rental & DVDs	800	2 nights	1,600
Recruiting	350	6	2,100
Incentives	200	21	4,200
Moderator	1000	3	3000
Reporting	2,000	1	2,000
Travel	800	1	800
Refreshments	200	2 days	400
Project Management	3,000 (15%)	1	3,000

3. Select a Target Country





Which country should I target?

- Depends on your product's tier one countries and ROIs
- Depends on your research questions & research methods
- Depends on your budget
- Visual Studio Japan research example
 - Japan – decision was driven by budget (12K), lowest growth in ALM market, overall enterprise ecosystem unknowns, first intl UX research initiative, UX researcher's native language
- Once you decide on the target country, narrow it down to a major city
 - Japan: Tokyo vs. Osaka (different attitudes toward technology - formal vs. casual, enterprise vs. entrepreneurial)
 - China : Beijing vs. Shanghai (Shanghai is more cosmopolitan), Taiwan or Mainland (traditional vs. simplified Chinese characters)
 - Germany: Berlin vs. Munich (e.g., TV study - Berlin uses more free-to-air Satellite)



4. Select a Type of Research

What are the Pros and Cons for each type of research?

	Areas to Consider	Focus Groups	Usability Studies	Site Visits
	Type of Insights	General Attitudes	Depth, Technical	Unmet Needs
	Overall Cost	Medium to High	Medium to High	Low
	Local Vendor Knowledge	Very Good	MKTG firm (OK), UX firm (Very Good)	OK
	Recruiting difficulty	Low - Medium	Medium to High	Very High
	Number of Users	High	Low to Medium	Low
	Simultaneous translation	Must	Not essential (Baseline studies) Must (other lab studies)	Preferred
	Facility Usage Days	Short	Long	N/A
	Facility Setup difficulty	Low	High	N/A
	Need of more than one locations	Ideal	No	Ideal
	Need of tight script	Preferred	Necessary	Not essential
	Need of UX Researcher Presence	Preferred	Necessary	Preferred

Type of Research (example)

JAPAN VISUAL STUDIO UX RESEARCH PROJECT (MAY, 2011)

Started with 2 methods with 2 setups...

- Focus Groups at vendor's facility
- Field Site Visit at customer site
 - NTT Data invited us to show the demos and interviews

Added 2 more methods with 3 more setups

- In-Depth Interviews at nearby coffee shop
- Focus Group at MS Osaka office
- Product Demos and Interviews at MS Tokyo office
 - We invited Fujitsu customers with their laptops



5. Decide on the Duration

How much time should I spend from start to finish?

- Set aside a minimum of 6 weeks
 - 3-4 weeks before you leave
 - Processing the PO, translating materials, recruiting participants, reserving the facility
 - Most PO processes take 7-10 days
 - New vendor process takes 4-6 weeks before it becomes live on MS Market
 - 1-2 weeks during the research
 - Travel time, lab setup, train moderator, pilot study, post-session debriefing
 - 2 weeks after the research
 - Data analysis, report generation, presentation
 - Report generation typically takes 2 weeks from the vendor

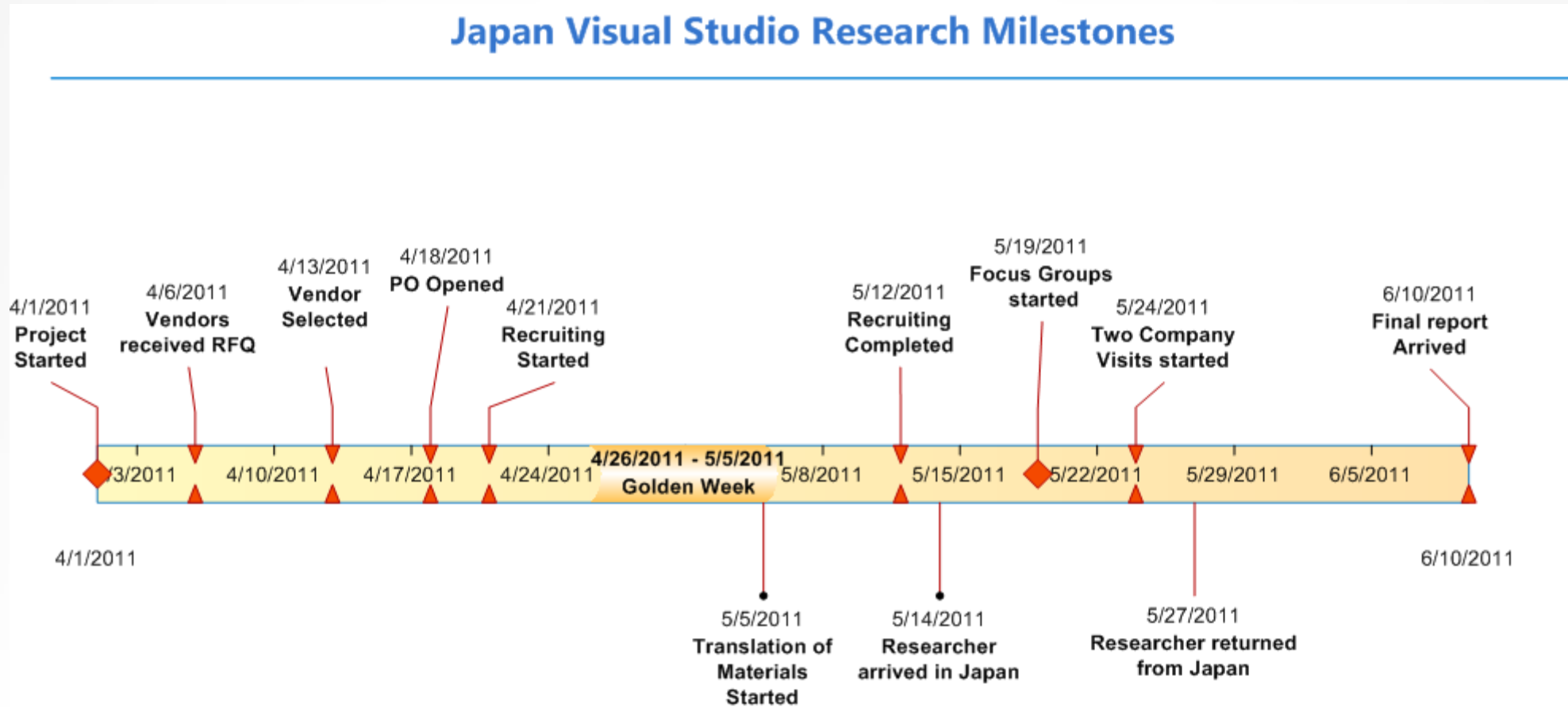
5. Decide on the Timing

When is the best time to visit?

- Consider preferred seasons to visit
 - Don't visit Europe during August vacation season
 - Don't visit Japan during the rainy season (June/July)
 - Don't visit Japan during Golden Week (4/28 -5/5) and Obon Week (8/10 – 8/16)
- Consider including weekends
 - Weekends are good to use for lab studies for Asia - you can run more studies a day
 - Japan, Korea, Taiwan, UK, Germany, facilities are available on weekends
 - Other European countries and China facilities are unavailable on weekends
- Business hours are different from US
 - Most participants cannot attend during the day (e.g., Asia)
 - Most participants cannot attend during the Siesta (e.g., Spain, Italy, Portugal)



Duration/ Timing (example)



6. Select Vendors (RFQ, SOW, POs)

- Before deciding on a **vendor**, you should:
 - Decide whether to use a **marketing firm** or a **usability firm** – both have pros & cons
 - Consider using **local vendors** who speak the local language, aware of local privacy laws
 - **Avoid sub-contracting** out. Global Marketing firms are usually OK
 - Consider a vendor who has a **good reputation with Microsoft**
 - Consider a vendor who already **has a MS vendor number** - a new vendor takes time to register them
 - Consider a vendor who has **bilingual researchers/ PMs** – it's very handy
- **Request For Quotes (RFQ)** should be sent out to at least 3 vendors:
 - Compare & contrast fees to negotiate better, and avoid procurement audits
- **Statement of Work (SOW)** should include detailed deliverables, milestones, and quality expectations
- **Purchase Orders (PO)** can be opened in US dollars to avoid currency conversion issues

Select Vendors (example)

JAPAN VISUAL STUDIO UX RESEARCH PROJECT (MAY, 2011)

- Email screening with 5 vendors in Japan. Worked with all 5 of them before.
 1. U's Eyes Design – consumer focus, no EN speakers, not experienced in developer profile
 2. Human Interface – location is too far, Japan PMs cannot join otherwise good vendor
 3. Synovate – most expensive bid, frequent communication delay, didn't seem to care (it matters!)
 4. TNS Infoplan – reasonable bid, great location (Roppongi), PM rep seems great
 - ✓ 5. Sugata Research
 - The cheapest bid
 - Have a good reputation and, work frequently with MS Japan team
 - Have experience with developer profiles, and their technical moderator is well-known
 - PM rep is at the partner level, bilingual in both EN and JP

7. Recruit, Translate Materials

■ Screener

- Use the flexible, simpler screener - job titles are different in other countries
- E.g., Business Analyst title doesn't exist in Japan. Most similar one is System Engineer
 - Example - created [two screeners: one for end users and one for MVPs \(relaxed version\)](#)

■ Translation of Materials

- Hand off the materials (e.g., script, design comps, prototypes) in advance for vendor
 - Example – design comps, prototypes are difficult to perform by the vendor
 - Example - I did most of the translations for script and demos for the JP study, and [reviewed them with a technical rep in Japan for refinement](#)



8. Decide on Facility, NDA

■ Facility

- Vendor's lab - investigate the location, existence of one-way mirror, HDTV (great for design study), SW requirements, dual headsets, DVD conversion capability, seating reqs, audio quality, etc
 - Example - we decided to use only the [vendor's lab](#), and then we needed to add an [MS Tokyo conf room](#), [Osaka conf room](#), and [local coffee shop](#)
- Local Microsoft UX Labs - follow the local UX lab protocol
 - Example - Although we thought about using the [MS UX lab in Chofu](#), but the location was too far and they were subject to rolling blackouts

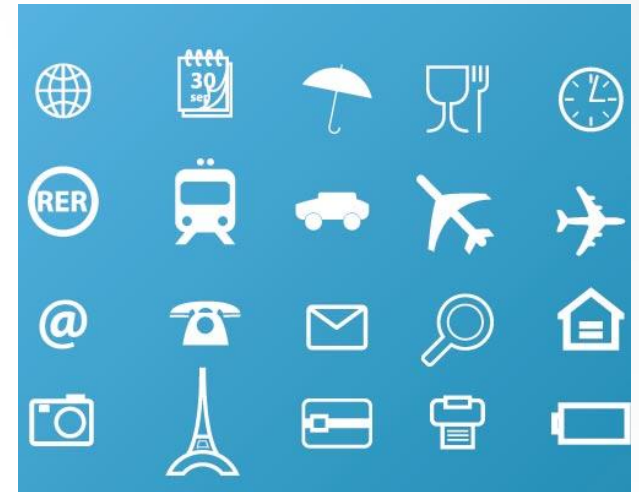
■ NDA

- Make sure the regional (translated version of) NDA is up-to-date with UXC
- Aware of local privacy laws, as Personally Identifiable Information (PII) must be treated very carefully in most countries
 - Example - We used the [vendor NDAs](#) so that they could videotape the sessions (our vendor asked permission for videotaping, some other vendors don't even try to videotape)
 - Example - We used the [MS NDA for the Site Visit](#)
 - Example – We [did not share MVP names](#) with the vendor in advance

9. Plan on Travel

How can I prepare to travel?

- Take someone who speaks local language from your team, or invite one from product team
- Create a logistics document for team members with meeting times & vendor phone numbers
- Have a map in the local language to the hotel and facility
- Try not to drive a car unless you are familiar with the area
- Carry all important docs & materials in carry on luggage
- Bring a suit for formal meetings, site visits
- Bring comfortable shoes for walking everywhere
- Check local customs, temperature, transportation, currency information
- Have enough cash in local currency
- Know basic words in local languages (esp. hello, where, bathroom, receipt)
- Melatonin will help you reduce your jet lag
- Don't forget your passport, flight tickets, and MS badge



Plan on Travel (example)

TIPS & TRICKS ON TRAVELING TO JAPAN

- Get full security access in advance
 - Don't need escort, or temporary badge
 - Make the request a week in advance
- Select a hotel carefully
 - Choose a hotel near the train station and MS Japan Office (Shinagawa)
 - Choose a hotel with employees will speak English
 - Choose a hotel with a global brand so that their rooms & beds are bigger
- Be aware of rolling blackouts
 - Find the vendor, hotel, meeting location which is not subject to rolling blackouts (i.e., Minato district in Tokyo)
- What to bring
 - Handkerchief for bathroom, Gifts for sub MS office and customers, business cards in Japanese
- More Japan travel info at : [GPG Japan Portal page](#)



PHASE 1: PLAN

PLAN WELL TO EXECUTE SUCCESSFULLY

PHASE 2: EXECUTE

BE FLEXIBLE BUT FIRM ABOUT WHAT TO WANT

PHASE 3: COMMUNICATE

SHARE SMART, SPREAD WIDE

EXECUTE

WHAT TO EXECUTE IN PHASE 2

1. Connect with local reps
2. Finalize the plan with the vendor
3. Pilot the study
4. Conduct the rest of the study
5. Validate the post-study essentials
6. Analyze the data, create presentation
7. Tips & Tricks during the stay (Japan)

1. Connect with local reps

DEEPEN YOUR EXPERIENCE

- Local reps are a great source of regional information
 - Brief meeting with the local reps to understand the impact of current + future issues
 - They rarely encounter the Redmond development team, and are eager to see new stuff
 - They will help to reveal more research focus areas (e.g., Excel for specs)
- Experience the culture in local MS offices
 - It is great to see the local MS office and experience a glimpse of another culture
 - Have lunch with local reps in your discipline to get connected
- Invite them to attend the research
 - It is a great way to show the real customer impact in person
 - Make sure to follow up with them after the research



2. Finalize the plan with the vendor

BE FIRM ABOUT WHAT YOU WANT

- Review participants
 - Review their backgrounds, number of participants, backup participants
- Confirm facility or Site requirements
 - Make sure everything works. If not, ask for alternatives
- Train moderator with the script (for lab studies)
 - Most moderators have no context for the product. Take time to educate them.
 - Make sure to address critical areas so that they can drill in with more questions
- Validate material translations
 - Ensure translations match with the context – check them with your local MS rep
- Ensure refreshments, food options
 - UK – ask not to serve alcohol! Germany – ask not to bring too much food
 - Asia – make sure to address vegetarian options



3. Pilot the study

LAST MINUTE ADJUSTMENTS FOR QUALITY DATA

- A pilot study is critical, especially for a lab study
 - It should be done 1 or 2 days before the study so the setup can be modified
- Facility setup adjustments
 - Labs may not be fully equipped
 - Make sure to set the optimal levels for camera angles, audio & video setups, seating arrangement (e.g., male & females, younger & older)
- Moderator / Translator
 - Make sure to give him/ her firm feedback, correct false assumptions in advance. Most of them are not UX researchers.
 - At this point you could still even switch the moderator/ translator
- Focus area shift
 - We typically want to cover everything, but we can't. Be firm about cutting some of the areas if it's necessary. Focus on the P1 areas, and don't be afraid to cut P2 areas out



4. Conduct the rest of the study

AIM FOR HIGH QUALITY DATA

- Take good notes and proactively seek insights
 - You **can't solely depend on the vendor**, you know more about the product than anyone
- Be flexible, but don't sacrifice quality
 - If something is not going well, be firm and quickly demand a change from the vendor
 - **Be ready to switch to plan B anytime**, and even plan C for extreme cases
- Monitor everything to make sure it goes smoothly
 - **Assume everything will NOT go smoothly**
 - Don't do anything to confuse the vendor and complicate the situation
- Conduct debriefing right after each session
 - It is **very critical to clarify the insights** with team members and the vendors
 - Don't be afraid of ask questions even if they sound stupid –**they may not know what they don't know**



Conduct the rest of the study

WHAT WOULD YOU DO IN THESE SITUATIONS?

- Lab has no one-way mirror >>> ■ Setup the TV in other room, Switch the location if it's critical
- Over recruiting >>> ■ Use extra participants for other purposes
- System crash >>> ■ Switch to interviews, show paper prototypes
- Translation is not great >>> ■ Ask for other translator
- My laptop stopped working >>> ■ Use the backup hard drive, borrow the laptop from hotel
- Subway not working (snow day) >>> ■ Grab a taxi or re-schedule
- Sudden blackout due to lightning strike >>> ■ Calm the participants until the light comes back on

5. Validate post study essentials

Before you leave the country, you need to work with the vendor to:

- Validate the **deliverables**
 - Ask for the timing of DVDs, raw data, report
- Agree on the **format**
 - Agree on the data analysis format, report format
- Agree on the **report revision** when necessary
 - Agree with the vendor on the report revision process
- Don't approve the invoice until you are satisfied with the report
 - Make sure you **state it in the SOW**

6. Analyze the Data, Create the Presentation

- Do not wait for vendor's report to start analyzing the data
- Spend some time to investigate market analysis to sync with your data
- Illustrate a big picture on the regional ecosystem
- Compare and contrast with the existing US data
- Compare the data and findings with the vendor's report
- Validate the data with regional partners (pre-presentation)

7. Tips & Tricks during the Stay

TRAVEL ESSENTIALS IN JAPAN

- Cultural manners
 - Gifts to customers are a must. Typically better to have sweets or snacks
 - Use both hands for business card receiving and giving – and bow at the same time
 - Bow 60 degrees when you meet customers, and bow 90 degrees when you say “thank you” at the end
 - Have a handkerchief for the bath room visit (typically no paper towels)
- Temperature issue
 - Current recommended temperature is set to 27C (80F) in the offices and hotel rooms. Carry a handkerchief.
- Money matters/ At the restaurant
 - Always have some cash with you
 - Amex corp card is accepted only around the Metropolitan area of Tokyo
 - Don't tip at the restaurant – it is considered to be an insult
- Others
 - Taxis are handy, but be careful for automatic doors (open & close)
 - Walk on the left side of the street, and be careful when crossing the street
 - Japanese high tech toilets are great, but please examine before using....



PHASE 1: PLAN

PLAN WELL TO EXECUTE SUCCESSFULLY

PHASE 2: EXECUTE

BE FLEXIBLE BUT FIRM ABOUT WHAT TO WANT

PHASE 3: COMMUNICATE

SHARE SMART, SPREAD WIDE

Phase 3: COMMUNICATE

SHARE THE DATA STRATEGICALLY

1. Share the data with Key Stakeholders (selective)
2. Share the data with Product Teams (broadly)
3. Follow up on key Issues with Regional Partners and Product teams
4. Continue sharing the data through Brownbags
5. Communicate the plan for the next target country

COMMUNICATE (example)

GENERAL PICTURE WITH KEY FINDINGS

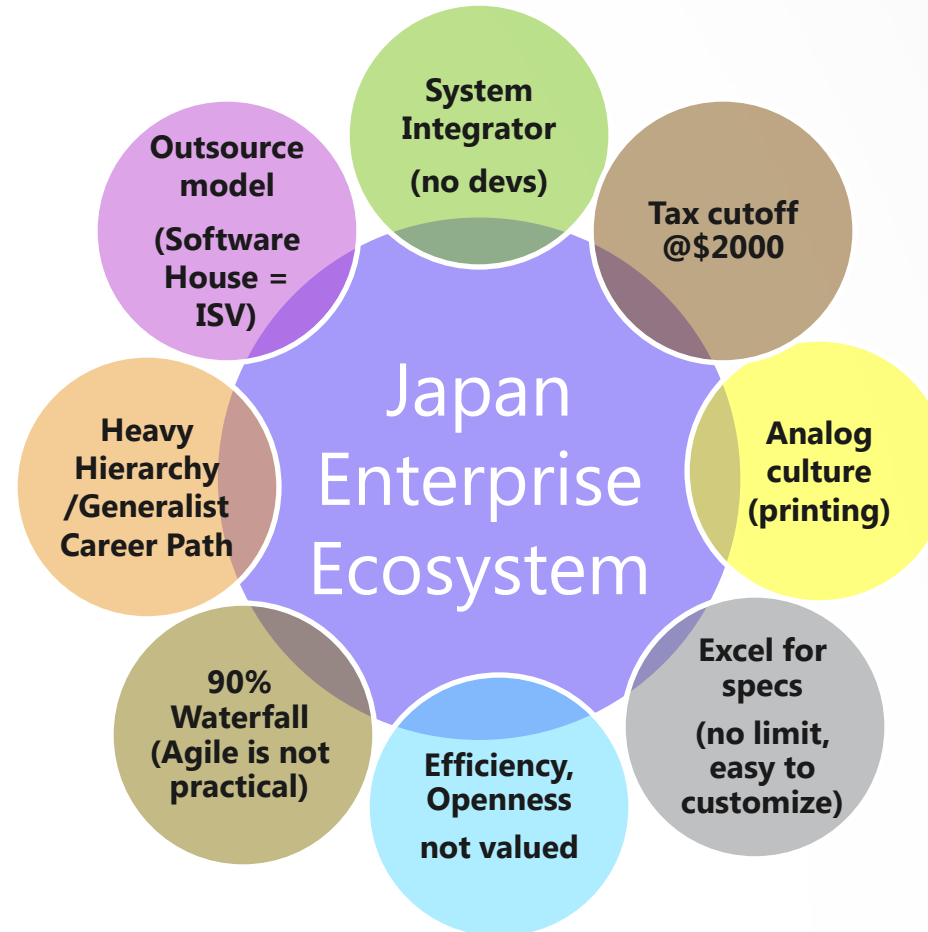
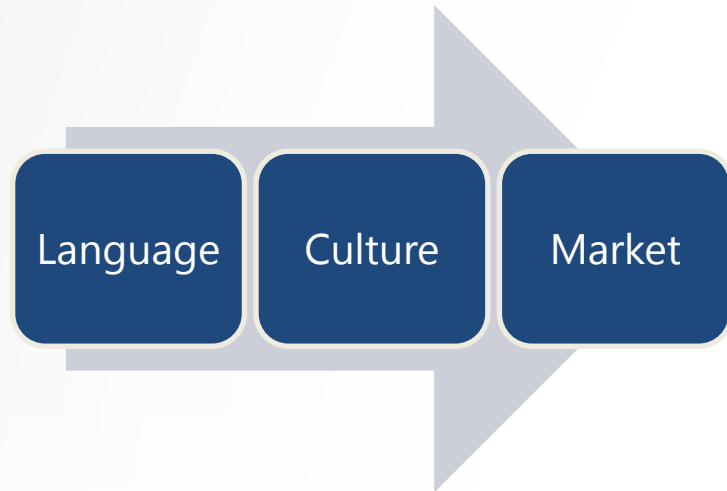
Since this is the DevDiv UX's first initiative to Japan, it was important for me to include these aspects in the results presentation:

1. Language/ Cultural factors
2. Current Market situation
3. Overall Enterprise ecosystem

I was trying to present how each of those above interacts each other

COMMUNICATE (example)

VISUAL STUDIO ALM RESEARCH FINDINGS



KEY TAKEAWAYS

Key Takeaways

- **Good planning** is a key to success
 - Take enough time to prepare all the details
 - Assess the research requirements very carefully
- **Be flexible, be creative**
 - Must adapt to unexpected situations
 - Assume everything will be different and have plan B, and C
- Aim for **high quality data**
 - Be proactive, firm, and clear about what you want
- **Picking the right vendor** will help with getting good data
 - Know pros and cons of the vendor and be prepared for it
- **Rely on nobody but yourself**
 - Expect the minimum from the vendor, local MS reps, or team members



Special Thanks

MANY PEOPLE HELPED ME WITH THIS

- **UX team:** Dan Dole, Karl Melder, Jeannette Gatlin, Sam Zaiss, Vikram Bapat, Emmanuel Athans
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- **DevDiv Globalization/ Localization team (IPE):** Mike Hedley, Aldo Donetti, Garrett McGowan, Terry Sheng, Nobuko Kurashige
- **Engineering Excellence team:** Alex Blanton, Robert Graf, Ken Sullivan

References

- All of my Intl UX research reports are under [Usable](#)
- Intl UX research page is now under [Toolbox](#)
 - Pitch decks, templates for forms, sample reports, etc
- [Japan UX Lab Protocol](#)
- [Japan Forms](#) (e.g., NDAs)
- [Japan Travel Portal Site](#)



THANK YOU



BACKUP SLIDES

ROI Examples

- Case study #1: Hewlett-Packard Company (2003-2005)
 - Contributed to major Industrial design changes (e.g., location of the memory card insertion, need of light colors due to dust issue) based on three site visits to Japan, Korea, and Taiwan –sales increased for the following year
 - Contributed to major Japanese localization (printer UI strings) changes after 3 usability studies in Japan – saved \$\$\$ by changing the localization process
- Case study #2: Nielsen-Norman Group (2003)
 - Contributed to design guideline for flash effects on Japanese websites
- Case study #3: Windows Media Center TV (2005-2007)
 - Contributed to NEC's decision to be on board with Media Center, based on the competitive benchmark against Sony, NEC, & Fujitsu
 - Contributed to regional customization issues (e.g., TV guide) based on a usability study conducted in Japan
 - Contributed to satellite First Run UI changes based on a study conducted in Germany

ROI Examples

- Case study #4: Microsoft TV (2008)
 - Contributed to the UX enhancements and increase perception of UX importance for Mediaroom IPTV in different regions based on a competitive benchmark conducted in Switzerland, Germany, Italy, Singapore, and UK
- Case study #5: MSN/Bing Video (2009)
 - Contributed to MSN/ Bing Video's regional support of new designs (e.g., player, TV search) based on 5 focus groups conducted in 5 countries (i.e., China, Japan, Germany, France, Brazil)
 - It was historically very hard to align design directions among all key stakeholders in subs
 - Reassured the product team to move forward with the proposed design