Bridging Perspectives

A Framework for Seamless Collaboration Between UX Researchers and Data Analysts

Subhasree Chatterjee

(SHOO-boh-shree)

Data Analytics Manager

She/her/hers

Archana J Shah

(Ur-chan-ah)

Principal UX Researcher

She/her/hers

Subhasree Chatterjee

(SHOO-boh-shree)

Data Analytics Manager

She/her/hers

Archana J Shah

(Ur-chan-ah)

Principal UX Researcher

She/her/hers

Analytics

How big?

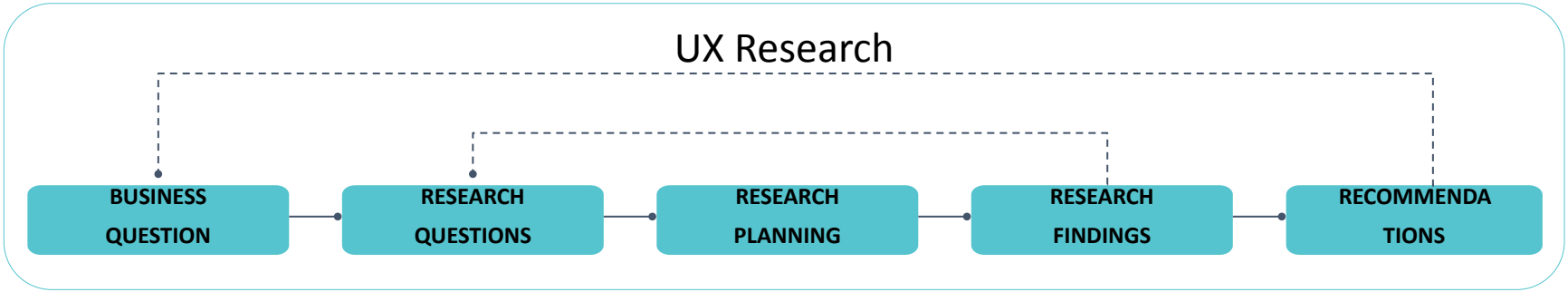
How many?

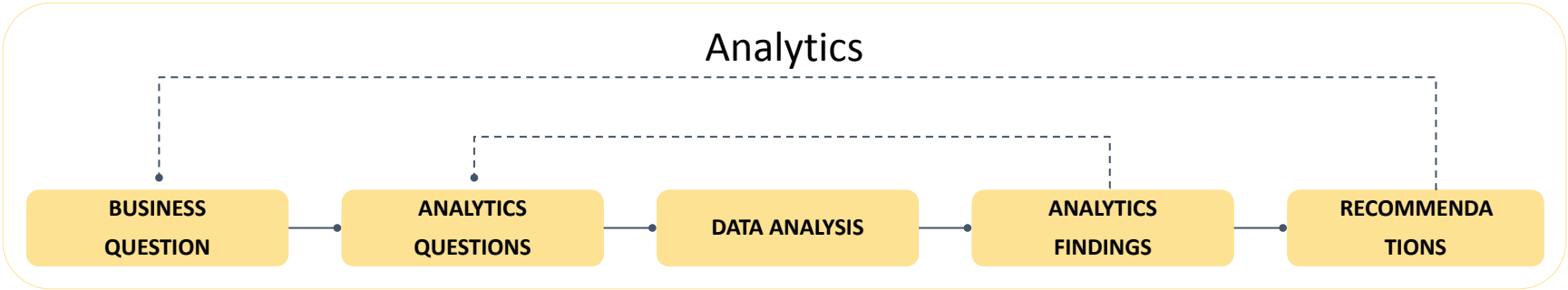
Research

What?

Why?

What our processes looked like





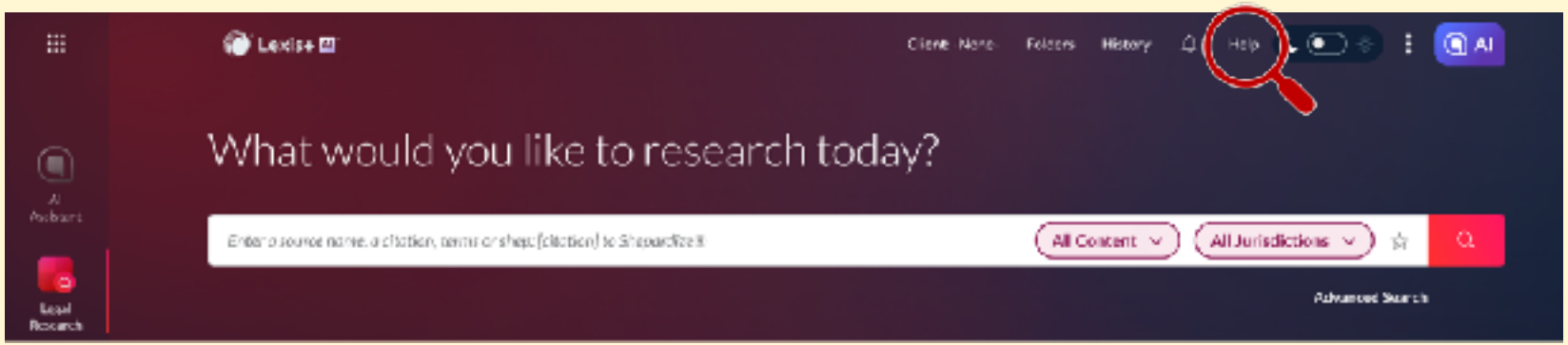
a tale of two strangers

Context

Law is complicated. So is Legal Tech.

Legal professionals do a lot of complicated research.

Customer support was overwhelmed with high volumes of calls seeking help.



Business question

Would rebuilding in-product help really... help?

B-T-Dubs: you got one month.

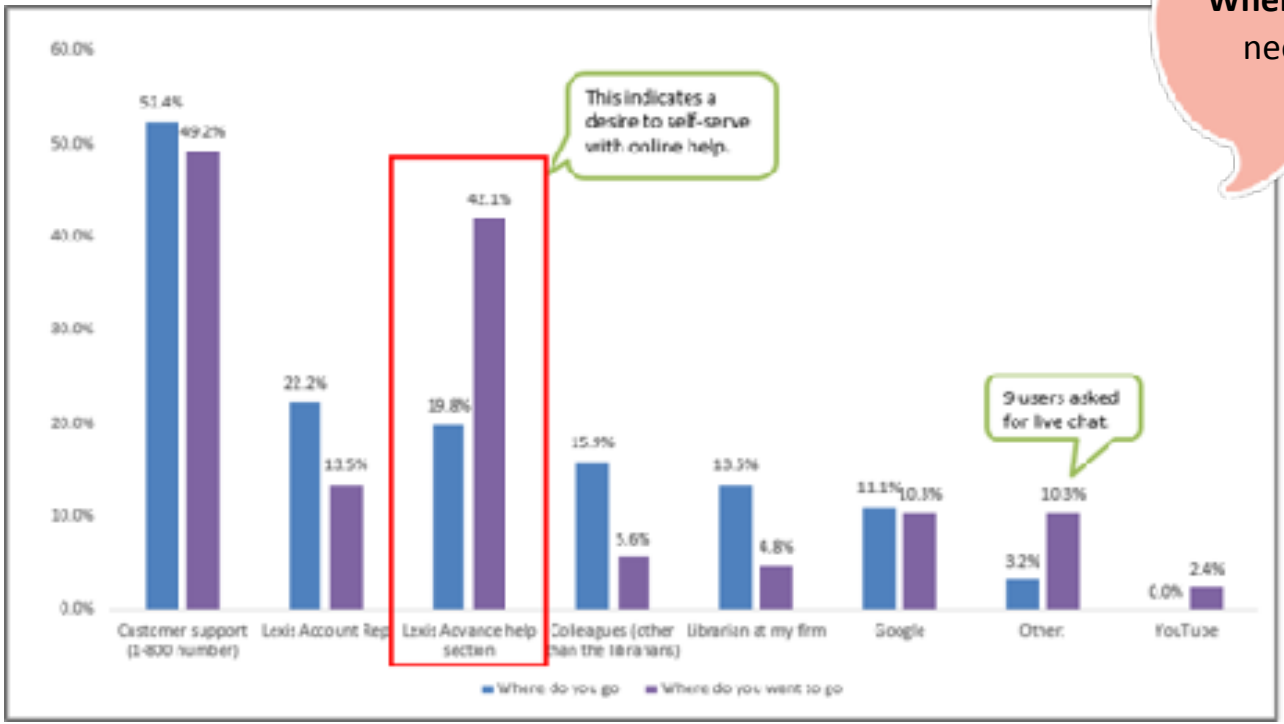
Users wanted help with crafting effective searches

Why do users need help?

Where do users need help?

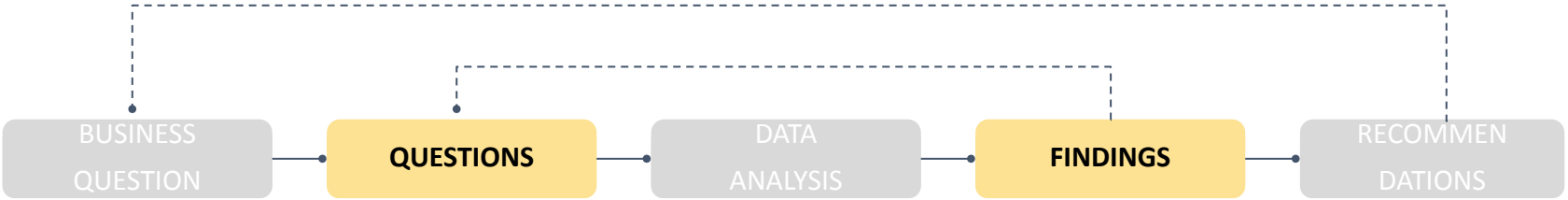
> “It is difficult to plug in all the knowledge you have in your head to find relevant information. And time is of the essence.”

They wanted help online



Where do users need help?

Users weren’t using the in-product help



What are the most accessed help links?

How frequently users access help?

How does the user journey look inside help sessions?

- Extremely small percentage of users clicked into help
- 20% of our users have used help multiple times
- Sessions with help actions had higher effort scores
- Majority used help right after running a search

A new help system was created with:

More directions on using advanced search capabilities
More contextual search-based help content

We built it.

And nobody came.


PEANUT BUTTER
CHOCOLATE


WAIT...
THAT SOUNDS FAMILIAR
makeamemeorg

Barriers between research and analytics

Lack of clarity in roles, ownership and how to work with one another

Lack of understanding of each others' disciplines

Time constraints

Stakeholder biases and influences

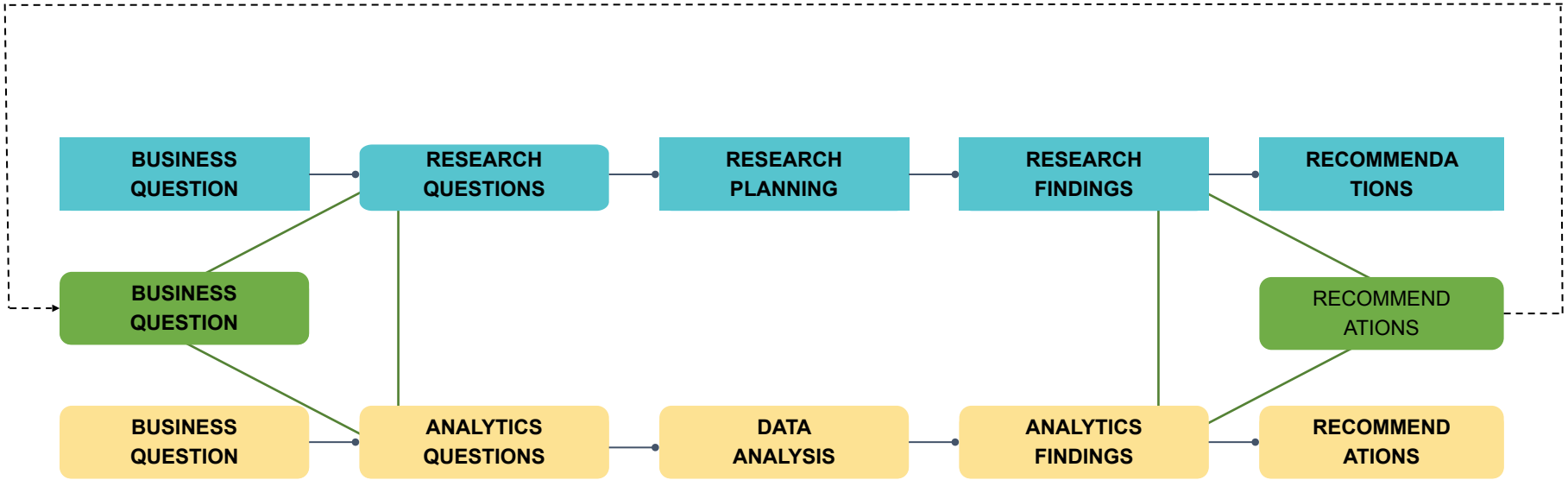
Impact of these barriers on business

- Solving the wrong problems
- Less efficient
- More expensive

In a parallel universe...

a tale of two BFFs

The processes looked different



What they did: look for (seemingly ineffective) help with Search

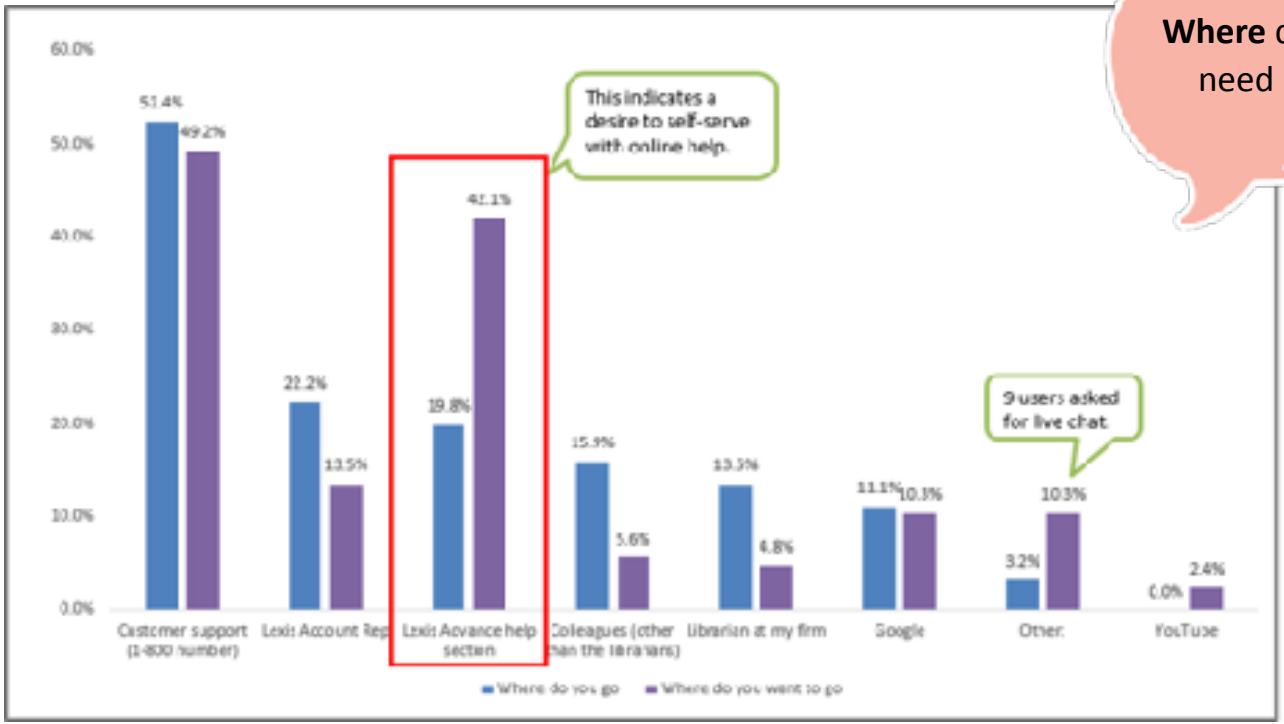
What are the most accessed help links?

How frequently users access help?

How does the user journey look inside help sessions?

- Extremely small percentage of users clicked into help
- 20% of our users have used help multiple times
- Sessions with help actions had higher effort scores
- Majority used help right after running a search

What they wanted: look for help online



Where do users need help?

Triangulation helped us modify our questions

Sounding boards, preferably online

How was customer support more effective than online help **with search**?

“ It is difficult to plug in all the knowledge you have in your head to find relevant information**.**

The system isn’t hard to use – figuring out the right terms is.

It’s easier to talk to Emily and figure out what terms work best for my scenario. ”

Discoverability of in-product help is not the issue

Maybe people have a hard time finding it?

Help

Help

HELP

Help

Help

Help

- Even when made more visible, people were not engaging with help
- People still preferred calling support to get specific help, even if they accessed the help system

Putting it all together…

What

Users needed help with search most but weren't using in-app help deliberately – the sophisticated capabilities were unnecessary.

Why

Users needed sounding boards and brainstorming partners for very complex searches, preferably without losing context

Recommendation

More features, capability-based help content or training won't help. Online, in-context, conversational help will.

...we got a happily ever after

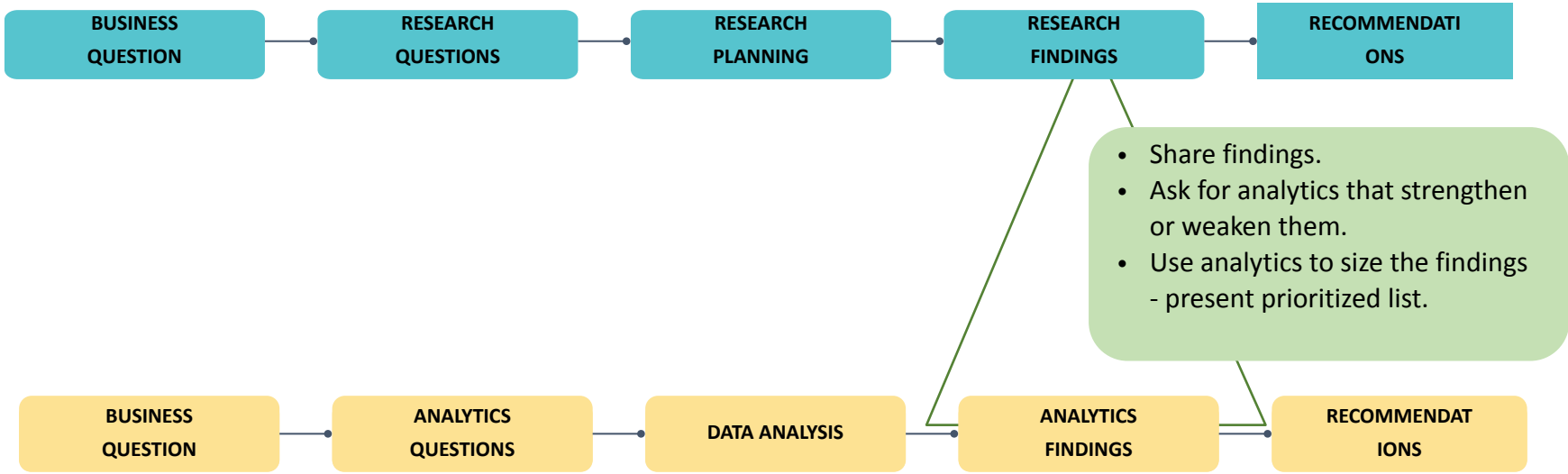
Project shelved!

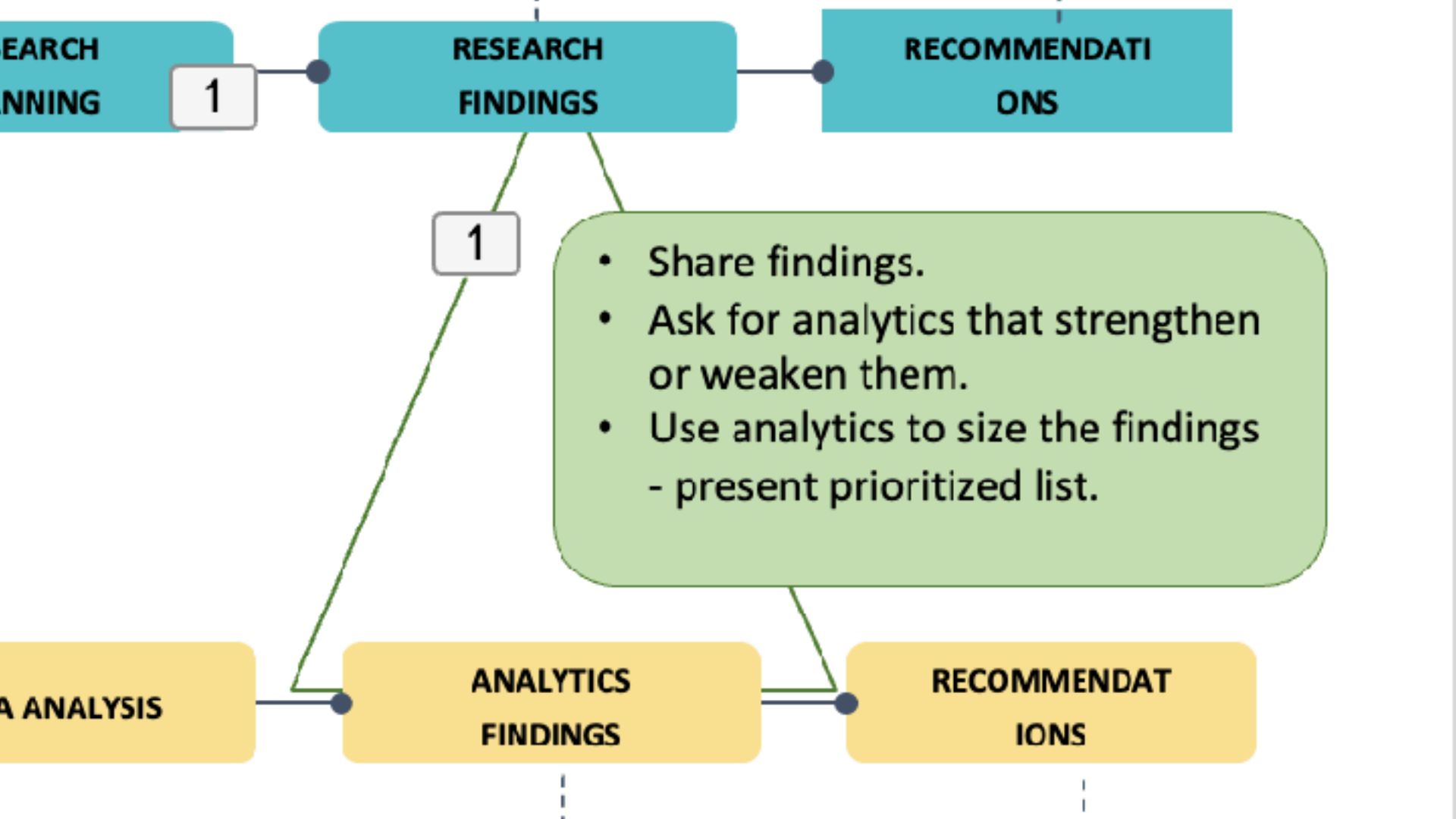
Bridging perspectives saved us time, money, and effort

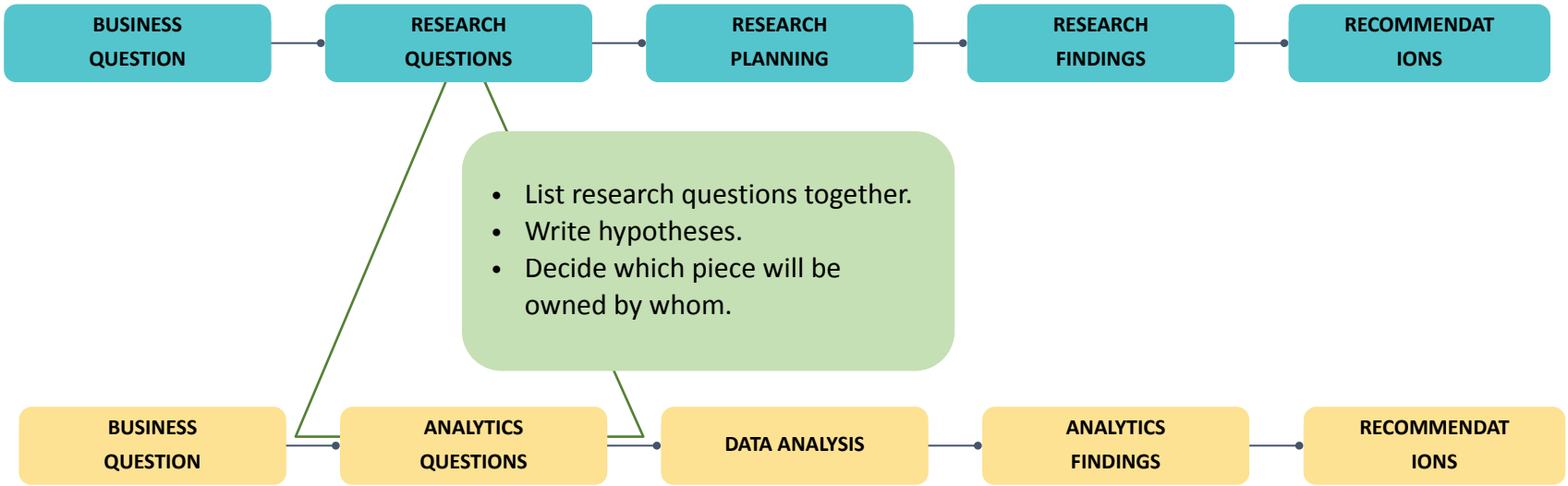
Yeah....
But how?


MARCO!
POLO!
PEANUT BUTTER
CHOCOLATE

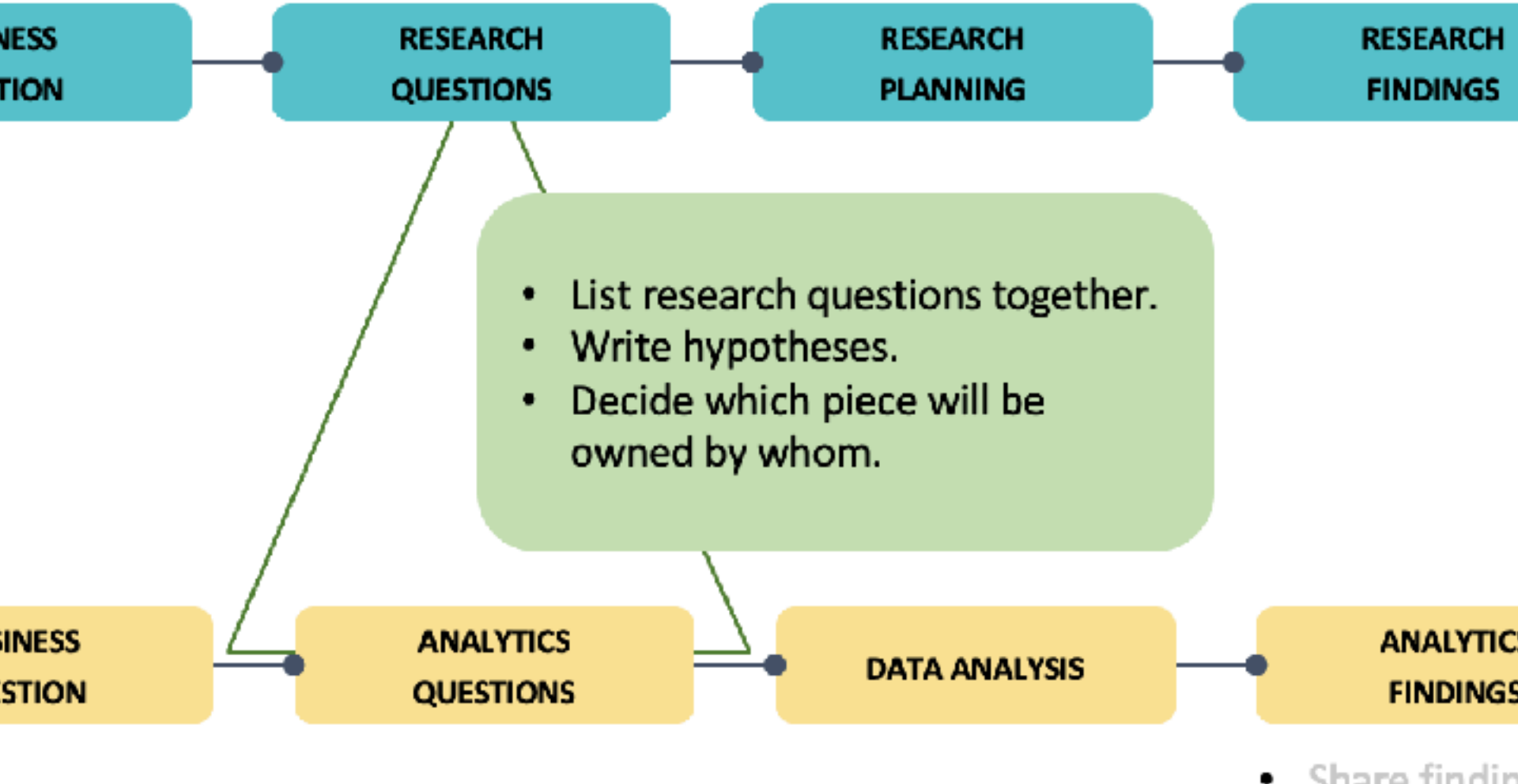
Find your counterpart | **Start building a bridge** | Strengthen it | Become best friends | Expand beyond projects

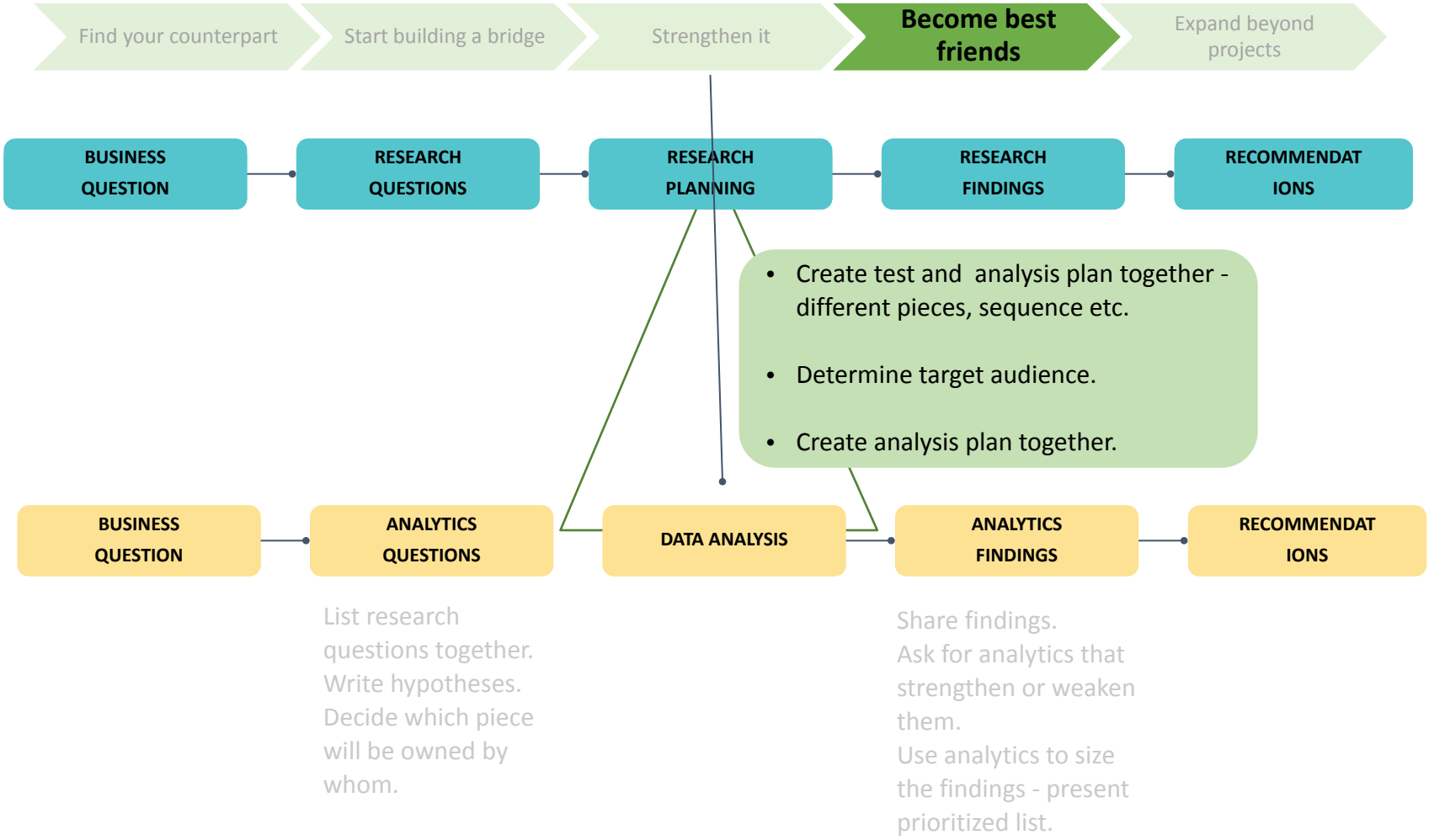


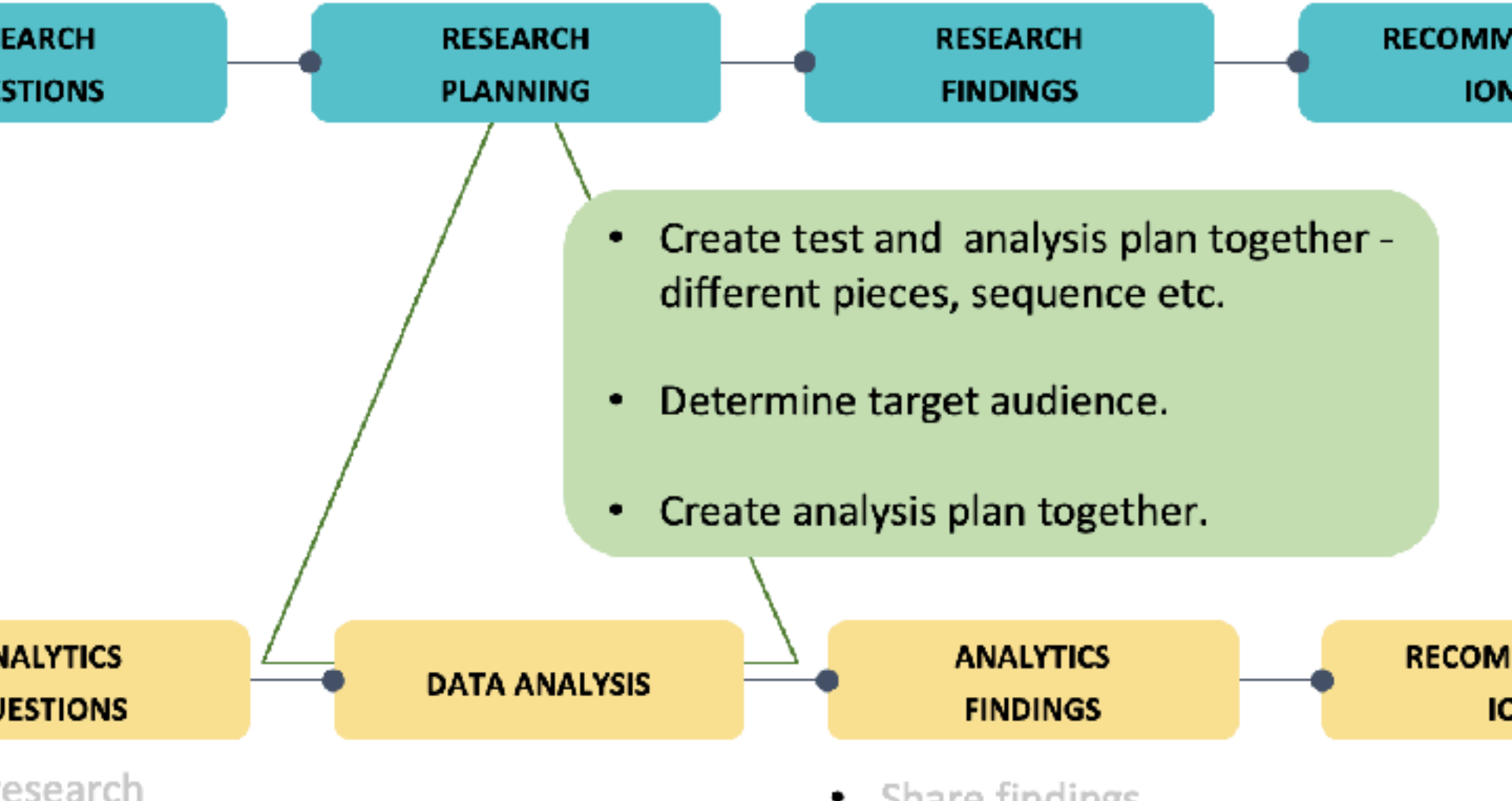

EARCH
NNING
1
RESEARCH
FINDINGS
RECOMMENDATI
ONS
1
• Share findings.
• Ask for analytics that strengthen or weaken them.
• Use analytics to size the findings - present prioritized list.
A ANALYSIS
ANALYTICS
FINDINGS
RECOMMENDAT
IONS



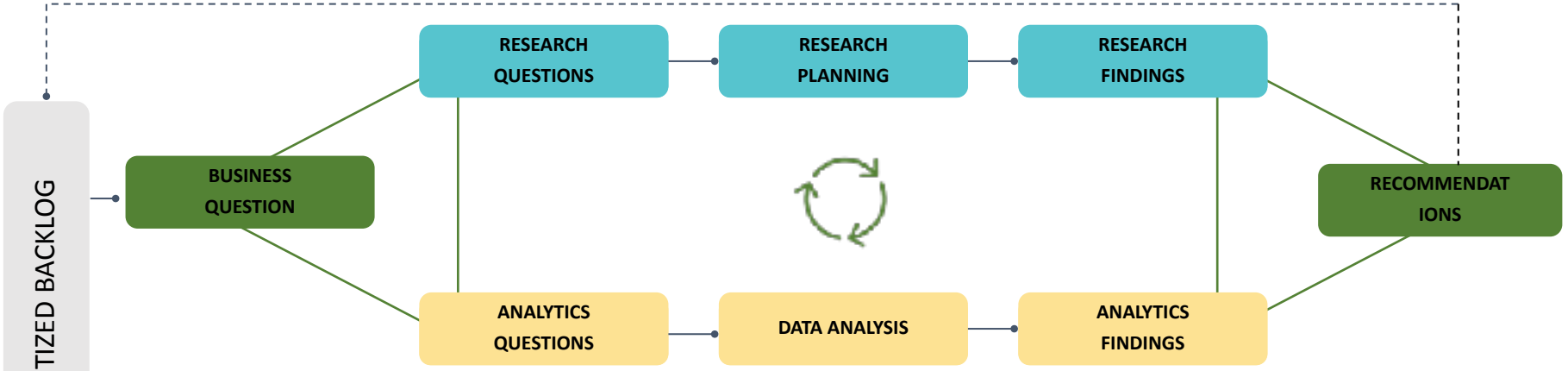
Share findings.
Ask for analytics that strengthen or weaken them.
Use analytics to size the findings - present prioritized list.


NESS
TION
RESEARCH QUESTIONS
RESEARCH PLANNING
RESEARCH FINDINGS
• List research questions together.
• Write hypotheses.
• Decide which piece will be owned by whom.
SINESS
STION
ANALYTICS QUESTIONS
DATA ANALYSIS
ANALYTIC
FINDINGS


Find your counterpart
Start building a bridge
Strengthen it
Become best friends
Expand beyond projects
BUSINESS QUESTION
RESEARCH QUESTIONS
RESEARCH PLANNING
RESEARCH FINDINGS
RECOMMENDATIONS
Create test and analysis plan together - different pieces, sequence etc.
Determine target audience.
Create analysis plan together.
BUSINESS QUESTION
ANALYTICS QUESTIONS
DATA ANALYSIS
ANALYTICS FINDINGS
RECOMMENDATIONS
List research questions together. Write hypotheses. Decide which piece will be owned by whom.
Share findings. Ask for analytics that strengthen or weaken them. Use analytics to size the findings - present prioritized list.


EARCH
STIONS
RESEARCH
PLANNING
RESEARCH
FINDINGS
RECOMM
ION
• Create test and analysis plan together - different pieces, sequence etc.
• Determine target audience.
• Create analysis plan together.
NALYTICS
UESTIONS
DATA ANALYSIS
ANALYTICS
FINDINGS
RECOM
IO

Find your counterpart | Start building a bridge | Strengthen it | Become best friends | **Expand beyond projects**



Size the problem using past data and analytics.

Identify whom the problem is best solved for.

Design success metrics.

List research questions together.

Write hypotheses.

Decide which piece will be owned by whom.

Create test and analysis plan together - different pieces, sequence etc.

Determine target audience.

Create analysis plan together.

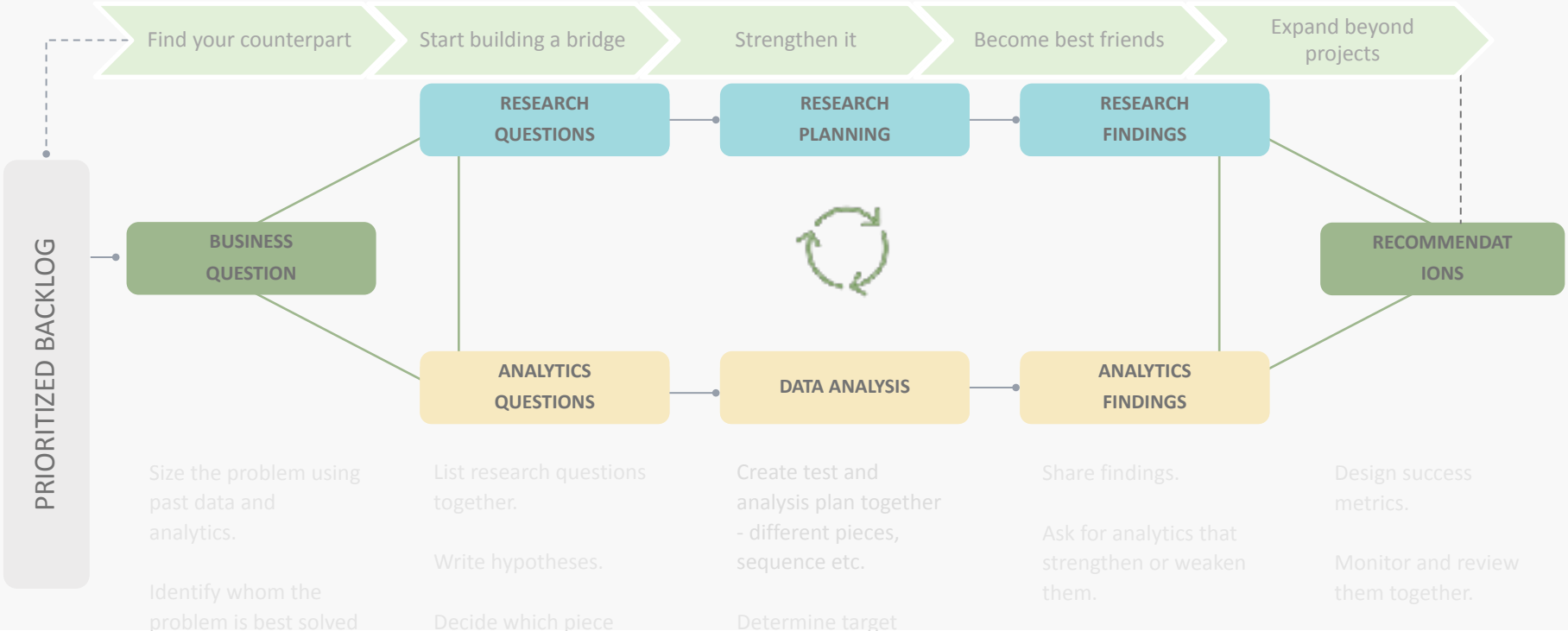
Share findings.

Ask for analytics that strengthen or weaken them.

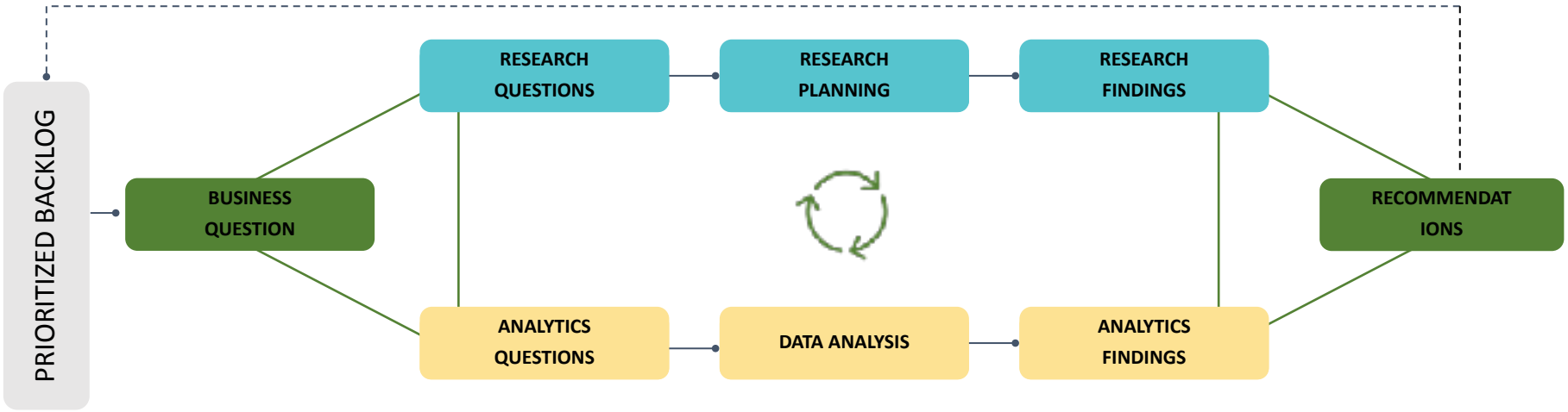
Use analytics to size the findings - present prioritized list.

Monitor and review success metrics together.

Synthesize insights and recommend additions to backlog.



How?					
	Periodic cross functional meetings	Templates Checklists Working sessions	Working sessions Data exchange	Templates Checklists Working sessions	Dashboards/ Periodic reports



What?	Size the problem using past data and analytics. Identify whom the problem is best solved for. Design success metrics.	List research questions together. Write hypotheses. Decide which piece will be owned by whom.	Create test plan together - different pieces, sequence etc. Determine target audience. Create analysis plan together.	Share findings. Ask for analytics that strengthen or weaken them. Use analytics to size the findings - present prioritized list.	Monitor and review success metrics together. Synthesize insights and recommend additions to backlog.
How?	Periodic cross functional meetings	Templates Checklists Working sessions	Working sessions Data exchange	Templates Checklists Working sessions	Dashboards/ Periodic reports


The point we’re trying to make is…

Bridging Perspectives = Happy Users + Happy Business

Holistic view of users and user problems

More efficient and effective research

...and an effective product!

Questions?

DISCLAIMERS:

No researchers or analysts were harmed in the production of this presentation.

Some chocolate and peanut butter was consumed.

THANK YOU!


Subhasree Chatterjee
Data Analytics Manager at LeadsNexis


Archana Shah
Curious and passionate UX researcher with a love for triangulation