
Lessons Learned About Orchestrating Remote, Moderated, International Usability Studies

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“Remote, Moderated, International”

- “Remote, Moderated” User Testing
 - Participant & facilitator not in the same physical place
 - One on one
 - Real time (i.e., Synchronous)
 - Communicating via electronic technology

- “International” User Testing
 - Participants from around the world
 - Users in their natural environment



Why international? Why remote?

- Why international?
 - Global world, products & services
 - Representative users

- Why remote?
 - Much lower cost than travelling for in-person sessions
 - Can reach a wider range of users
 - More flexibility in scheduling participants
 - More natural environment for participants
 - Additional observers can be easily connected



Case Study

- NIDA International Drug, Alcohol, and Tobacco (IDAT) Research Community*
 - IDAT public website
 - “The Exchange” membership community

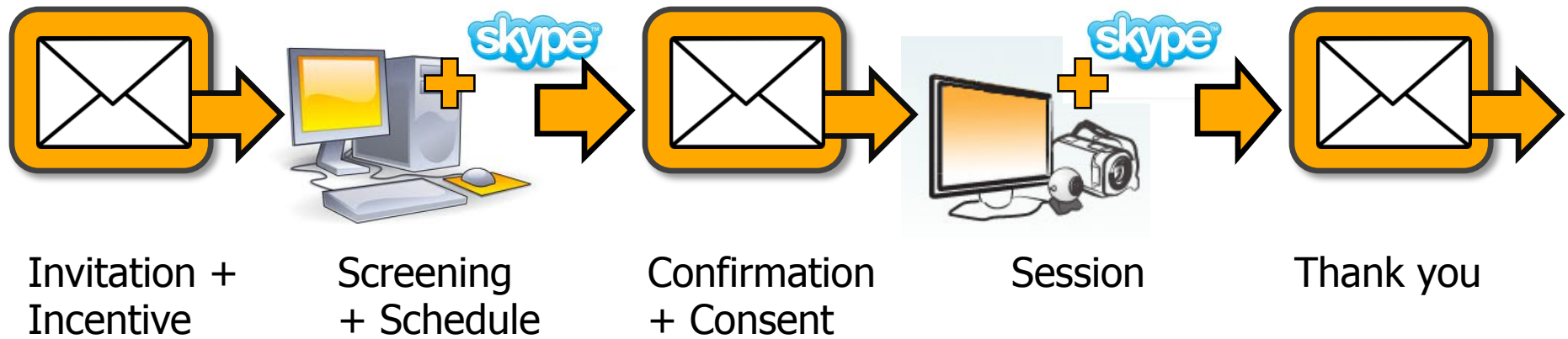


- Users were international researchers
- 20 participants from 16 countries covering 6 continents

*Developed by Danya International under a SBIR contract with NIDA



Case Study – Usability Test





Recruitment – Challenges

- International phone calls are expensive
- Reaching people by phone for screening difficult
 - Time zone differences
- Participants must be able to talk on phone and use high-speed Internet access simultaneously
- Lots of information to track
- Must obtain consent prior to session
- Participant must download plug-in

Did you know?

Some time zones are 30 or 45 minutes off GMT (not only full hour differences).



Recruitment – What We Did

- Sent email announcing the study to prospective participants
 - Linked to brief demographic questionnaire
 - Asked for best times to call and time zone
 - Asked for phone number and/or Skype name

Exit this survey

UserWorks

Usability Study of NIDA Research Website

1.

Thank you for your interest in participating in a usability study to evaluate a new NIDA-sponsored research website. Please answer the questions below and we will contact selected participants within the next few days.

*1. What country are you from?

*2. What is your job title?

*3. Do you do research in substance abuse as part of your job?
 Yes
 No

Comments

Exit this survey

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Usability Study of NIDA Research Website

3.

*6. Please provide your name:

*7. Please provide your email address:

*8. Please provide a phone number and/or Skype name where we could reach you. If possible, please include your country code:

*9. Also, provide the best times to reach you by phone and indicate your time zone:



Recruitment – What We Did

- Set up recruitment schedule with:
 - Requested local time/US time
 - Number of hours difference
- If we could not reach by phone, we sent email
 - Scheduled a 15-minute call for screening interview
- 24-hour around the clock recruiting

Did you know?

Daylight Saving Time takes effect on different days for different countries. And, of course, not all countries participate.



Recruitment – What We Did

- Confirmation Email
 - Confirms session in participant's local day/time and our day/time
 - Confirms telephone/Skype name/backup
 - Gives instructions for downloading GoToMeeting
 - Provides recording consent information
 - Participant asked to give consent by replying with specific wording giving consent to be recorded
 - Confirms participant's method of receiving incentive
 - Many were not able to decide while on phone
 - Choices: PayPal, VISA international gift card, US check



Recruitment – What Happened

- Took multiple calls to screen participant
- Telephone screening process took twice as long (30-40 minutes) due to:
 - Language and cultural differences
 - Technical difficulties (cell numbers)
 - Many interruptions and call backs (cell phones)
- Leaving messages was ineffective

Did you know?

In Saudi Arabia, the work week is from Saturday to Wednesday. The weekend consists of Thursday and Friday.



Recruitment – Lesson Learned

- More detailed preparation required, not less
- Collect majority of information via the Internet
 - As much screening info as possible prior to call
 - May have to email to coordinate screening interview time
- Allow time to explain downloading of plug-in
- Create scheduling calendars with columns for:
 - Local date/EST date
 - Local time/EST time
 - Always ask “What time is it there now?”



Data Collection – Challenges

- International phone calls are expensive
- Technology must work with a range of setups
 - Operating systems
 - Screen resolutions
 - Internet connections
- Language barriers can slow down session or cause confusion



Data Collection – What We Did

- Used Skype to call participants
 - Calls were free to participants who had a Skype account
 - For calls to landlines and cell phones, the cost varied widely
 - Lesser developed countries cost significantly more than developed countries
 - Audio quality was very clear



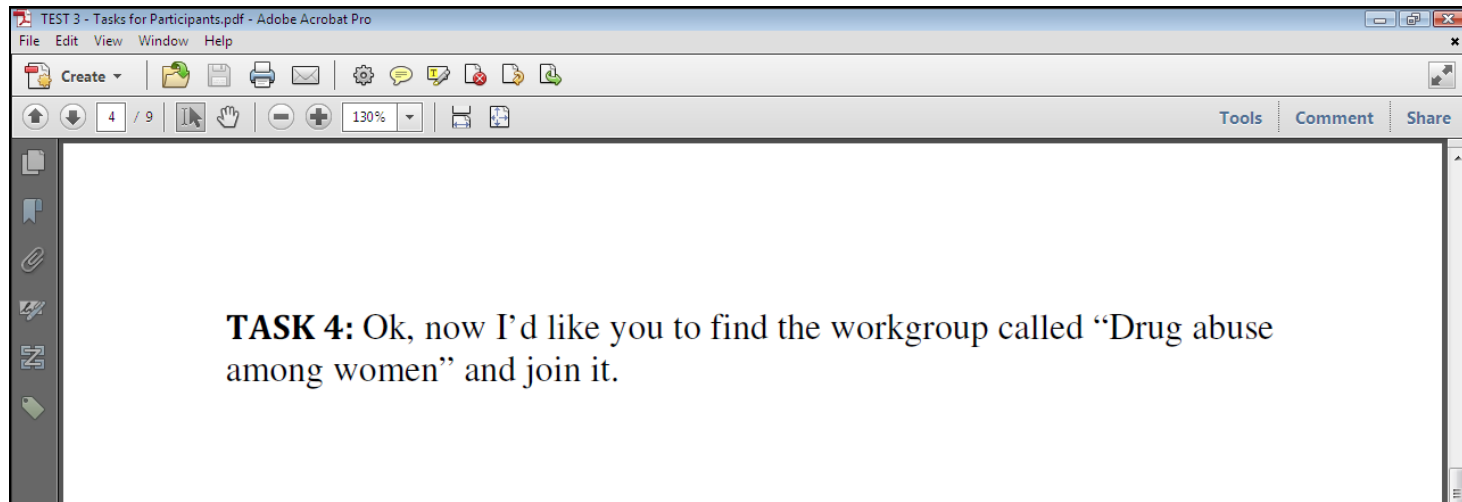
Data Collection – What We Did

- Used GoToMeeting to share our lab computer screen
 - Operating system: No compatibility issues
 - Screen resolution: Some had trouble reading the text if their screen resolution was lower than ours
 - Internet connection: A couple participants experienced significant lag (10-20 seconds) when new pages were loading



Data Collection – What We Did

- Used Morae to record our screen and the audio
 - Presented a written version of tasks as PDF on the screen





Data Collection – Lessons Learned

- Build in extra session time for technical set-up and language barrier issues
- Provide on-screen written instructions for participants for whom English is a second language
- Be flexible when the unexpected happens



Incentives - Challenges

- Different countries have:
 - Different currencies
 - Different mail delivery systems
 - Different policies



Incentivizes – What We Did

- Used PayPal, international Visa gift cards, and US checks; each had limitations
 - In some countries, PayPal users can only send money and cannot receive it.
 - International Visa cards works in most, but not all, countries.
 - The process of sending the cards is also very long.
 - US checks can only be deposited in American bank accounts.
 - Some participants did not trust their country's mail system and were concerned they would not receive their incentive.



Incentivizes – Lessons Learned

- Provide multiple payment options
- Thoroughly research the limitations of each payment option



Recap of Lessons Learned

■ Recruitment

- More detailed preparation required, not less
- Collect majority of information via the Internet
- Allow time to explain downloading of plug-in
- Keep participant information organized

■ Data collection

- Build in extra session time for technical set-up and language barrier issues
- Provide on-screen written instructions
- Be flexible when the unexpected happens

■ Incentives

- Provide multiple payment options
- Thoroughly research the limitations of each payment option



Overall Lessons Learned

Stay organized.

Be flexible.

Be patient.



Questions?

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