

SPEAKING TO MARKET RESEARCHERS: *A Usability Moderator's Glossary*

BY JOE BUGENTAL

When your company or client doesn't have a suitable usability lab for your project, who are you going to call? The answer is often a market research or focus group facility. Market-research professionals, however, speak a slightly different language from usability professionals. In the words of one usability colleague, they don't get usability.

As the two disciplines join forces in the future to study "the whole user experience," we need to communicate—and share facilities—more easily. Here are some definitions that will help to smooth the rough spots.

Brand — You probably learned the traditional definition: the symbolic representation of all the marketing information connected with a product or service. However, in emerging practice, it's the client's promise to the customer—the customer experience from "How did you hear about...?" to "What did you think?" It's the "total customer experience," in which both marketing and usability research are involved. In fact, we're working together much more in light of this new definition.

Client room — Control room or observation room. Market researchers treat their clients nicely, with a separate space for big shots behind, and a little above, the audio-video control desk. In addition to high-speed laptop connections at each seat, there's likely to be another soundproof back room (with a video feed) for phone calls, and often a sumptuous buffet (for these people only; the users—respondents—get sandwiches and soft drinks).

Clients — Creators of the product under discussion; the people who hire the moderator. Although the moderator is frequently the focus-group facility's client, the use of "client" is reserved for the end user of the research—the "developer" in software and web usability work.

Day — Unit of measure for facility rental. You probably think about the number of sessions in a usability project, but facility operators don't care how many sessions you run. They want to know how many days of the week you need the room. Since most marketing focus groups occur in the evening, some facilities will negotiate lower day rates if you can wrap up your sessions by 4:00 p.m. and the facility can get a second day's use in the evening.

Ethnography — Contextual inquiry or customer visit. When market research people say they're "doing an ethnography," it means they're going to the respondents' homes or offices to interview them.

Food — Sandwiches and soft drinks are standard for respondents, but in the client room, the spread can include anything from panini and pickles to surf-and-turf dinners. This is all well and good, but expect to see the cost on your invoice.

Interview, in-depth interview (IDI) — The marketing equivalent of our classic one-on-one lab session. If the market research facility is doing your recruiting, this definition is important in two ways. First, a one-on-one interview is inherently different from a group; make sure recruiters tell respondents which one to expect. Second, usability "interviews" generally involve completing tasks using prototype tools—that is—work, not just opinions; study participants need to know that, too, before they arrive.

Issues — The substance of the moderator's protocol or script, similar to

tasks but with as much focus on the purchase decision as on the end use. Marketing issues may involve opinions about product package designs and colors, but are unlikely to go into anything like recovery from errors.

Markets — (1) The cities or other geographical entities from which the respondent list is recruited. (2) The respondent profile identified by the screening script. The use of scripts with tightly defined points at which the recruiter must "continue" or "terminate" are equally important

in marketing and usability.

Moderator — The equivalent of a study administrator or facilitator, someone with strong interviewing skills and perhaps a bit more showmanship than in usability. Market researchers tend to run high-intervention studies and probably are not timing any task completions. If you hire them to help conduct your test, you may need to brief them first about the importance of *not* intervening in a usability exercise. In fact, it would be a most exceptional situation for me to ask the facility to supply a moderator—that's usually *my* job.

Qualitative research — Overall heading for various market research methodologies. The quantitative component is conducted outside focus group facilities on telephones, with clipboards, or, increasingly, online.

Quirks — (<http://www.quirks.com/>) One of the most widely circulated market research trade publications.

Panel — A user group. Many panels are now based in and on websites and e-mail. There's a growing use of similar tools in usability work, enabling remote studies with or without live facilitation. While online studies save facility costs, they don't offer much direct observation and ultimately rely on some degree of self-reporting.

Project — The total (rentable) days involved in one rental agreement.

Respondent — Participant, test subject, user; the recruited representative of the target audience for the product. Facility recruiters think of "participants" more generically; they can be moderators and observers as well as users.

Room — Actually a two-room suite with one-way glass and video; typically far more luxurious—though often older tech—than the typical lab and control room used for usability testing.

Schedule — While focus group facility operators are accustomed to dealing with schedule changes, they do have trouble with our slippery development schedules; they've got other clients scheduled in the same room the next day.

How to Find a Market Research Facility

- There is a list of market research facilities and recruitment firms online at <http://www.stcsig.org/usability/topics/recruiting-firms.html> that contains:
- Links to major directories, including the one from *Quirks* (<http://www.quirks.com/directories/index.asp>).
- A list of companies worldwide with contact information and information on the market research and usability testing services offered.

ABOUT JOE BUGENTAL



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