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Advanced UX lab techniques: Don't just listen to users



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I'm writing this during the lock-down as I have some downtime, and I hope to give back to the wonderful UX community with some tricks I've picked up over the years. While UX research can only currently be done remotely (and many of these techniques should be transferable), we will one-day return to our trusted lab spaces and continue the magic of human-centred innovation face-to-face.

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So, you're a few years into a blossoming UX career and know everything you need to know about UX moderation:

- Squeezing the most out of your participants;
- Digging deep without leading;
- Spotting (and exploring) miss-truths;
- Going off-script when needed;
- Not going over time;
- Making sure your notes are clean and actually make sense the morning after.

Great! This is no easy feat, and takes a lot of dedication, holding your nerves and self-reflection.

Well done :-)

For this post, I'd like to share with you some tips on what else you could be doing during your UX lab time to take things to the next level.

These techniques were developed over the years through reading, experimentation, failure and iteration. But they all follow a mindset I have written about in another post, that of **engagement**.

A UX lab session is about two things in equal measure:



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‘*What you learn*’ comes not just from your participants, but from the other observers watching them. ‘*A memorable experience*’ comes not just from your participants, but from the activities that happen in the back room.

So for this post, I’d like you to **forget about your users and focus on the time you are spending in the observation room.**

This is where the real insights happen and where you learn the most. It is where the shared experiences are stored deep in the memory banks.

These techniques take extra planning, discipline and brain-power. But they make all the difference when creating an inspirational and memorable environment.

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1. More observers please

The most important tip, and the glue that holds it all together, are your observers.



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I spent a lot of my career suggesting UX Lab attendance as an optional *'nice-to-have-but-don't-worry-if-you-cant'* affair. Some would show up but many wouldn't, prioritising other activities and leaving the research to us.

Over time, I learnt that this **is wrong**, and ignores the bigger picture.

As the UX industry matures, and organisations' hunger for insight expands, our role is changing. As [Monty Hammontree puts it in his post on the future of UX](#):

“The answer does not lie in adding more researchers who focus on learning on behalf of the many. It's in expanding the role of researchers to focus on empowering everyone to learn.”

We should be enablers of analysis and 'multipliers' of research skill-sets, serving those who use products **AND** those who create them.

Try to see your lab-time more than an optional means-to-an-end. It is an essential piece of interactive theatre that you are curating for the benefit of the attendees and the project.

So, Tip 1 is: **Invite as many as you can to attend your sessions.**

Invite more than you need. Consider what other initiatives have an impact on this project and who will be involved in later phases. Consider those who are not directly involved in product development or marketing.

All will have useful input, and all will come away with a greater understanding of the impact this kind of research can have.

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2. Light (not Dark)

Most research labs I've encountered are set up for the traditional approach to UX lab

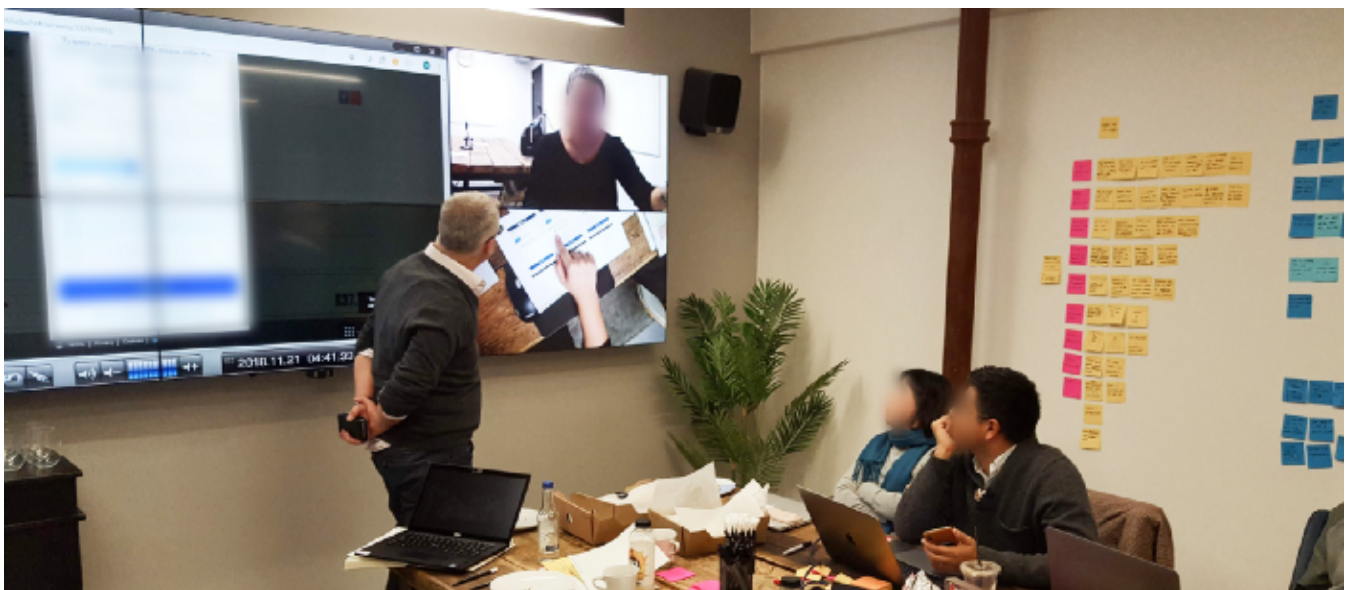


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But in my experience, the more we move away from the this formula, the more insightful the event.

If the lights are off, the atmosphere will hamper discussion and obstruct creativity. If the lights are on, your attendees will feel comfortable discussing ideas and reacting to problems as they happen.

The best labs, in my view, are those where the back room is not connected, except through technology.



Example separated backroom, with sufficient space for observers, and sessions viewed through screens.

Face and room cameras, screen-share and audio are enough for most studies. So a separated, fully-lit room lifts the atmosphere and keeps attention-levels higher for longer.



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In this session, a sheet was put up behind the glass window, so participants couldn't see us in the back room with the lights on.

As not all labs are set up this way, there will be busy periods when you can't use the lab you want. In this case, most labs will be able to put a blind (or even a sheet) up to cover the-way mirror, if you ask nicely. I've done this before and it is very effective, not least in creating a talking-point for attendees and an excuse to explain how the day (show) will run.

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3. Post-it's & wall space

Once you have the lights on, you can start to curate the space to enable discussion and creative thinking. There are two aspects of this you'll need to prepare for:

#1 Section off wall space by theme/feature/page etc.

The environment will be key to creating a productive atmosphere where everyone knows how to contribute. Here are some things to think about:

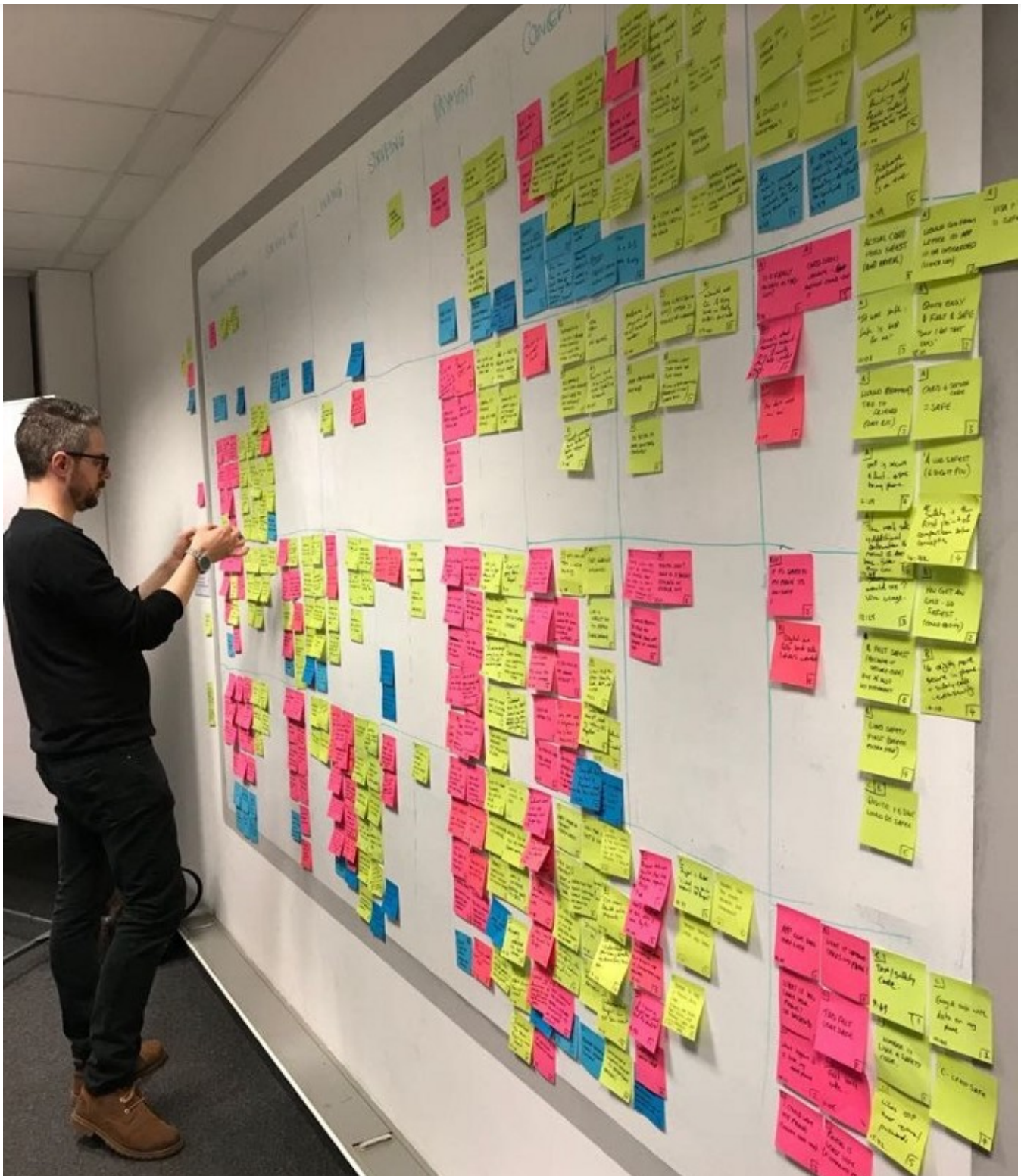
- *Wall space:* A perfect back room for your session should have large areas of clear



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- *Prepare in advance:* Think about your space in advance so that you come prepared on the first morning. If you're unsure, ask the labs to send pictures of the walls. Also, have play around with some layouts on [Miro](#), [Sketch](#) or [Figma](#).
- *Keep it top-level:* I've made the mistake in the past of trying to sub-divide my zones too much. In reality, you don't know which topics will need the most space, so start with 3–6 zones. You can always sub-divide further once you know what kind of insights you are getting.
- *Mark your zones:* If you have a whiteboard wall, mark out your zones with a pen. If not, ask if you can use tape. Once you've marked out your zones, add clear titles in large capitals so everyone can see them. If you don't have a whiteboard wall, use large post-its or sheets of paper.
- *Stick up designs:* If a zone relates to a design, feature or screen, print them out and stick them up for everyone to see.



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In this session in Hamburg, the labs had a whiteboard wall in the back-room, so we used it to define specific areas for our notes.

#2 Post-it instructions for all attendees

Once attendees start to arrive, its important to let them know what to expect, and how they can contribute. Yes. this will not be an 'easy' day for attendees to relax and watch



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- *Use post-it's for notes:* Its important for everyone to contribute to the environment. Encourage all attendees to ditch their notepads and work with post-it's instead. The more post-its, the better. It is particularly important for us researchers to understand the thinking of every attendee, as it will help us get better insights.

- *Colour code post-it's:* Ask all attendees stick to specific post-it colours for types of notes. Over the years we've settled on the following:

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Red/Pink = an **issue/problem**.

Green/Yellow = A **positive or general** point.

Blue = A **solution or recommendation**.

—

Any more colour codes and it starts to get difficult to remember. To me, the blue/solution post-its carry by far the most value. Many will spot the issues and positives, but most will have a different way to fix or change the product as a result. So they need to be captured live.

- *Write in thick black:* At the end of the day, you will want to take photos of these walls, for further analysis. Thick black pens (sharpies) are so much easier to read than other pens, especially ball-point. This should be a ball-point-free zone.
- *Write in capitals:* As you start to do this, you'll notice that there is a wide range in legibility of handwriting. I know mine is not great. So, while giving instructions for the day, ask everyone to write in capitals. Most will nod, knowingly.
- *One point per post-it:* Try to discourage multiple bullets/thoughts on the same post-it. You will no-doubt want to move them around at some point, so its important to keep each point separate.
- *Use a defined layout:* A written post-it needs to make sense on it's own and help with discussion and analysis. It's therefore important to add identifiers to each one. Here's what I use:

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Middle = a **thought, observation or quote**.

Top Left = **Topic**

Bottom Left = **Time-stamp**



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Many will not be expecting to do anything more than take their own notes, so its best to pre-warn a few ‘allies’ to get the ball rolling.

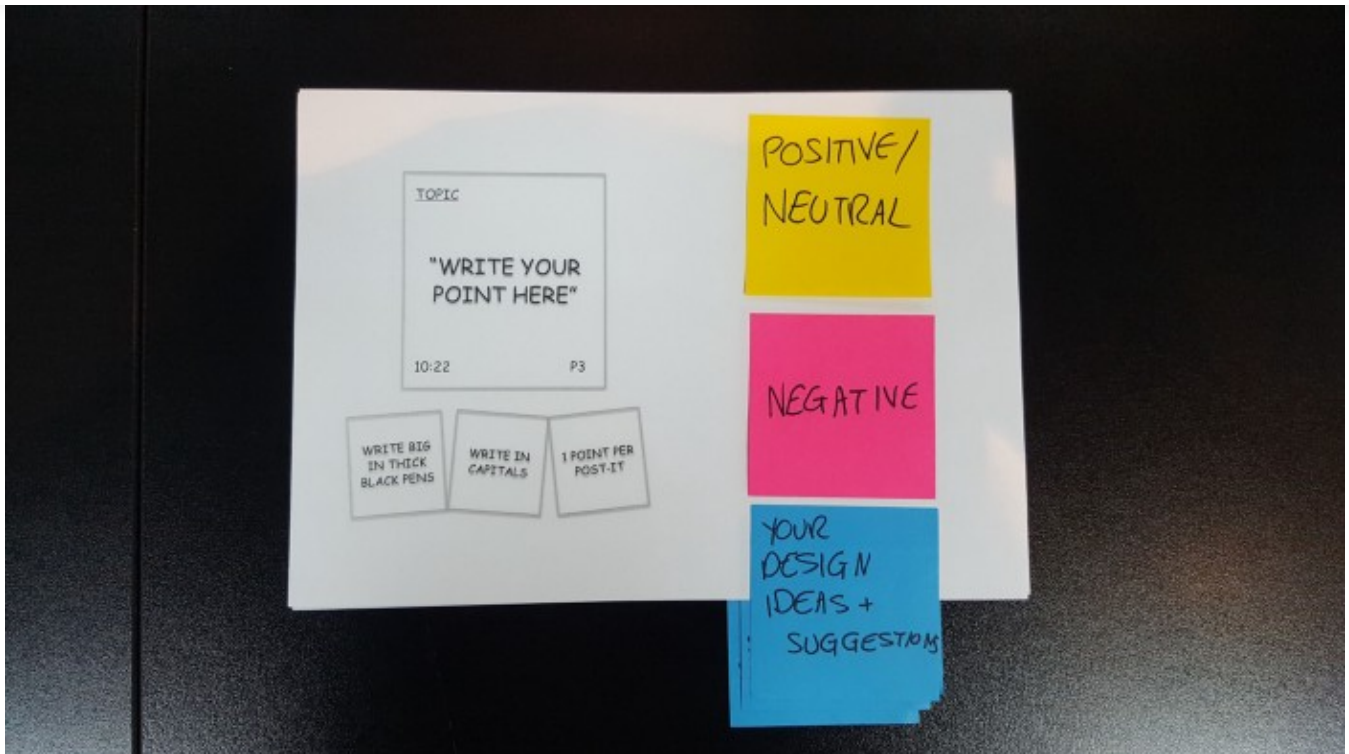
It’s also wise to prepare individual post-it packs with thick black pens in front of every chair so its clear they are for everyone.



‘Packs’ for attendees, including post-its and thick black pens, give a clear indication of expectations to all attendees as they arrive.

Finally, create some example post-its yourself, and stick them up on the wall for everyone to refer to. There are a lot of instructions to remember, and don’t expect everyone to get it right first time.



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Here, our standard 'rules' are printed and placed near the screens so all attendees can easily find them.

At the end of each day, lightly arrange the post-its, make sure none are hidden, and take photos.

Use these photos for quotes, analysis and to inspire conversations. You can also send these to non-attendee stakeholders to show how much work is being done.

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In my next post, I cover some techniques to help inspire discussion in the room and use it to build deeper insight and push designs as far as possible in the time you have:

4. Discussions and solutions thinking

5. Live communications and ad-libs

6. Iteration mindset

Bonus technique: The 10–10 workshop



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But for now, I hope this is useful. There are so many people to thank for helping to develop these techniques. We are indeed standing on the shoulders of giants as we push ourselves to improve.

All feedback, challenges, builds welcome as always. I'd love to hear from you.

Opinions expressed are solely my own and do not express the views or opinions of my current and past employers.

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