Solution Brief

Customer Experience/UX
Test & Measurement

Keynote Checklist for Formulating Web Studies

Based on proven market research and usability methods,[i] the Keynote evaluation development process consists of four phases: formulating strategy; developing protocol; data collection; and analysis and delivery of results. Our custom research team combines our technology and expertise to deliver insights on how customers are experiencing your online properties.

Phase I: Formulate Evaluation Strategy

In this phase, areas of concern are identified, appropriate target markets are selected, and the best evaluation design is chosen. Specific steps are outlined below.

- Decide on an evaluation design. Which design would best address the concerns (e.g., single-site, comparative evaluation, before–after, multiple conditions of the same site)? For evaluations with comparisons, decide whether a within-subjects or between-subjects design is more appropriate.
- Decide on the best user profile to achieve aims of the study. Develop a profile of this target market with respect to demographics (e.g., age, gender, income), and “webographics” (Web usage patterns, such as novice users versus power users).

Phase II: Develop Evaluation Protocol

In this phase, the team develops a set of tasks for panelists that address these objectives and choose supporting questions. Tasks include:

- Following the aims of the study defined above, choose objectives (typically three to six) and supporting questions that will provide data to inform the relevant design and marketing decisions (e.g., evaluation success of registration process and ask users whether they found it frustrating). What specific tasks will reveal problems of interest? For example, to determine how easy it was to search for goods on an e-tailing site, the specific task given to the panelists might be “find a men’s red cashmere sweater.” The Keynote template library is a valuable source for finding typical objectives and related questions developed from previous evaluations.
- Anticipate how behavioral measures (e.g., clickstreams, time intervals, page views) could provide insight into key concerns.

Behavioral measures – what customers actually do – versus their opinions and self-reports of behavior are generally viewed as the most reliable and predictive measures.

- Decide on attitudinal measures that address key concerns. What attitude ratings and open-ended comments would be most helpful in understanding why people are succeeding or failing at a task?
- Select questions that further define market segments, such as, “How frequently do you purchase clothes online?”
- Add conditional questions. Conditional questions are questions that are asked only if a prior condition has been met. For example, if a panelist says they are giving up on an objective, ask the open-ended question “Why are you giving up?”
- Anticipate users’ answers. If it can be anticipated that everyone will fail (floor effect) or that everyone will agree (ceiling effect), then a different specific task or quest will probably yield more interesting (i.e., surprising) information. Generally, tasks of moderate difficulty reveal the most because there is a wide variability in users’ ability to accomplish the task.
- There are typically three phases of a Keynote evaluation: the introduction, the objectives and associated questions, and wrap-up questions.
- Pretesting is critical to make sure users understand and interpret questions as intended. Are any questions confusing? Can users get through the protocol in a reasonable amount of time? What are the expected results?
- Evaluation scripts go through the Keynote quality assurance review before being used to catch technical errors.

Phase III: Data Collection

During this phase, the evaluation is launched and data is collected. Steps include:

- Panelists meeting sampling criteria are sent email invitations to participate in a study.
- To prevent response biases, Keynote does not disclose any information about the Web site users will be evaluating in the evaluation invitation.
- Panelists receive the invitation. They follow the URL associated with the site and begin the evaluation using the Keynote Connector, a small downloadable companion to Microsoft Internet Explorer.
- As sampling quotas are met, the evaluation invitations stop.

Phase IV: Analysis and Delivery of Results

Phase four is when results are interpreted and recommendations are developed:

- Analyze evaluation results. Data are automatically compiled into CustomerScope, Keynote’s online interface for examining data in easy-to-read charts, graphs, and other data aggregation tools. Data can also be exported to a flat file for additional statistical analyses using statistical software. Qualitative data can be searched using keywords or by common theme, and are also organized by group, such as by whether users succeeded, failed, or gave up on a task .
- Examine key measures and previously held hypotheses. Are hypotheses confirmed or disconfirmed?
- Based on data, develop theory for why users behaved and felt as they did.
- Check qualitative data for supporting and disconfirming evidence of this theory.

- Explore data for unanticipated insights.
- Develop action agenda based upon findings.

[I] For review of recommended survey development practices, see G. A. Churchill, *Marketing Research: Methodological Foundations* (New York: Dryden Press/Harcourt Brace College Publishers, 1999). For a review of recommended usability test development process, see J. S. Dumas and J. C. Redish, *A Practical Guide to Usability Testing* (Portland, Ore.: Intellect, 2000).

About Keynote

Keynote Systems (NASDAQ "KEYN") is the global test and measurement company for mobile communications and online business performance.
As an independent and trusted third-party, Keynote provides IT and marketing executives with an unbiased view into their Internet services from around the world. For over a decade, we have been providing measurement data and testing capabilities that allow companies to understand and improve their customer's online and mobile experience.

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