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Making design research work remotely

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Why we've written this guide

Design research is an important part of what we do at FutureGov, no matter *where* or *how* we work.

Remote working or a lack of physical access to people shouldn't mean that research activities have to stop.

Running research activities and sessions remotely requires some adjustment, but there are simple tools and practices that make this possible. This guide shares some of our insights and best practice for teams who now need to work remotely.

How to use this guide

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This is for everyone. FutureGov teams, as well as our clients, partners and the design community.

We've grouped the guide by different types of research activities to show how they can be delivered and used remotely.

This is not intended as a detailed how-to on the approaches and methodology included here. We've only included more detail for less common methods, or when activities don't have a directly comparable remote alternative.

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General guidance

Considerations for remote design research

These are some general considerations for planning and running remote research activities.

1. Technology

Most remote work is reliant on other people's technology. While we recommend different tools in this guide, be prepared for technical issues.

Confirm your technology choices with people in advance and put plans in place for if things go wrong. Put a pre-call in place to check the technology works for everyone.

Participants may have older technology or unexpected ways of accessing the internet (e.g. a gaming console), unreliable or no internet connection.

2. Etiquette

Many people will still be unfamiliar with remote work. Meetings and workshop etiquette may be unclear for participants. For example, camera on or off or mute by default?

Set out expectations and any rules for remote sessions clearly in advance, consider that participants may have caring duties (e.g. children or disabled family members) which might interrupt or disrupt sessions. Other disruptions can occur at home, for example the doorbell might ring.

Allocate more time than you would for face-to-face activities as communication and understanding may be slower.

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3. Preparation

Consider pre-workshop materials for participants and anything that you want people to read, think or know before joining the session at least 2 days in advance.

Plan more time around setting up your remote work. Check video and audio connections before any sessions start in advance. Also allow extra time in activities for participants to sort out technology issues, or access collaboration tools and shared documents.

4. Communication

Non-verbal communication is important. Ask participants to keep their cameras on so you can pick up on cues and facial expressions.

Allocate more time than you would for a face-to-face meeting as communication and understanding may be slower.

5. Collaboration

Ensure that everyone gets an equal voice when running group activities.

You can replicate dot voting and similar techniques through surveys, polls and using emoticons for voting. You can also ask people to prepare questions or comments and submit them at the same time to ensure everyone has equal opportunities to feed in. Ask people to work individually by putting themselves on mute, and then share their thoughts back to the group.

Consider using tools like flash cards to help people speak up without speaking over others.

Considerations for remote design research

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6. Explaining

When working face-to-face you can scribble, point, and draw out quick examples if something is unclear. When working remotely it can be harder to explain and communicate concepts.

Think about whether you can use slides and illustrations with explanations, prepare these in advance of running sessions and activities. Consider making a pre-recording explaining key information to share in advance or to use as part of sessions.

7. Focus

To replicate the levels of concentration you would get when working face-to-face, ask people to switch off any notifications that might interrupt them (slack, email, phone etc.).

You can also ask people if they are expecting any interruptions at the start of a session and allow for this. For example, someone might be working from home and expecting a delivery.

Schedule in breaks for longer sessions and activities. Consider adding social breaks to help teams to bond instead of just bathroom or tea breaks.

8. Larger groups

For larger group work, create new Slack/Zoom/Hangouts call groups.

Prepare the dial-in links and lists of participants in advance and build in additional time for people to dial into new groups. Ensure each group has a written set of objectives and that they can contact the facilitator if confused or to answer questions.

Don't skip ice-breakers. Consider getting people out of their seats. If you're using a new tool, try to include this in the ice breaker so people understand how to navigate it.

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Safeguarding participants

1. Be ethical

We may have different ethical concerns during this time, such as whether it's appropriate to engage with front line staff dealing with a Covid-19 response. This will be dealt with on a per-project basis. You should consult with your community of practice and project team. Consider whether you can gather the insight you need from previous FG projects or other sources. See our ethics playbook.

2. Get informed consent

As participants won't be able to sign consent forms in-person we will need to gain consent and document it digitally. See our WIP process for gaining consent.

We recommend approaching participants with consent forms during the recruitment phase so they are fully informed of any methodologies and technologies we might use.

3. Be sensitive

Participants may be uncomfortable with you seeing inside their house (e.g. if it's messy or in a poor state of repair). Be sensitive to this and prepare these requests in advance as part of the consent form. Participants in isolation may also be more emotional than usual, or seeking social interactions. Plan additional steps you will take to safeguard these participants.

Safeguarding researchers

1. Protect yourself

If you're switching on your camera, ensure there isn't any information visible that displays your address or other sensitive information (e.g. your card details).

2. Plan for difficult sessions

Create a plan for what you'll do if a participant does something inappropriate (e.g. appear on camera naked).

There's internal-only guidance on this in our ethics playbook and guidance on how to prepare for difficult conversations. We'll be updating these documents and releasing them to the general public over the next month.

3. Acknowledge your needs

The current situation is stressful for all of us. You may have contact with people who are more emotional or lonely. Pace your research with this understanding and make sure to take regular breaks.

Consider making a self care routine to protect your own mental health. Speak to your project director or line manager if you're struggling.

Types of activities

Building consensus

When you need to agree something or get to a shared understanding of something with a group or team.

Common activities

- defining vision, goals and objectives
- framing the problem
- creating a research plan

Approaches

Collaborative documents: Digital whiteboards can replicate most activities that you would do in-person with post-it notes or a whiteboard. At FutureGov we use Miro and Mural.

Capturing ideas and comments: Chat tools or apps like Slack can be used to share ideas and feedback simultaneously in threads. They can also support voting (aka adding emoji reactions).

Collaborating in real time: Live documents let teams work together, add comments and feedback. At FutureGov we use Google Docs.

Recruiting participants

When you need to recruit people to take part in research activities.

Things to consider

Frontline staff will not always have capacity to assist and to take part in research, so always use a mix of approaches when recruiting.

Be careful recruiting participants who have low digital skills for tech-heavy activities, and be specific about how technology will work in advance of session. If appropriate, let participants practice or prepare beforehand.

Consider if vulnerable individuals or young people should have third parties on the call for safeguarding.

Approaches

Digital touchpoints: Instead of directly approaching people using services, consider approaching them using digital touchpoints e.g. websites or social media.

Online communities: Explore if there are online local communities on Facebook, LocalHalo or Nextdoor that you can access to recruit participants. You may need to ask the client if you can use their address to create an account.

Proxies or carers: Can you connect with carers instead of directly with participants? Can they act as a proxy for your participant?

Recruiters: Use an external recruitment agency. View this spreadsheet (WIP, FG internal only) for recommendations and please add your own.

Documenting consent

For capturing the consent people give when taking part in research activities.

Things to consider

When working remotely people will not be able to sign consent forms in person. They also may not have access to a printer or scanner at home. Previously they may have relied on print or corner shops for these services and in some cases participants will be self isolated.

We are currently trialling a new approach with consentkit.io for documenting consent.

Approaches

Follow our standard file storage approach inline with GDPR.

Recording: Ask participants to record themselves saying "I consent to X, Y, Z. I don't consent to X.".

Digital signing: Send participants an image of the consent form to their phone which they can sign with an image editing app. Consider safeguarding when sharing personal phone numbers with people.

Avoid: Using Gmail to store documents as it will be difficult to locate them should a participant trigger their "right to be forgotten". Don't use new tools that we haven't checked for GDPR compliance.

Mapping

When you want to capture how something works, or understand the boundaries of something as part of a service, organisation, system-view.

Different types of maps [guide]

- storyboards
- user journey and experience maps
- service blueprints
- system maps
- stakeholder maps

Approaches

Complexity: Maps can be detailed and complex. Make sure you pick a tool that is easy to navigate and that everyone who needs to can access. At FutureGov we use Google Sheets and Miro.

Updating: Maps often change over time. We often produce physical copies to make them easy to update, visible and to support collaboration. Make sure you pick a tool that performs the same functions.

Generating: If you're running a workshop to generate a map, consider splitting people into teams to populate different parts of the map to ensure everyone contributes. As it's harder to work through a mapping session remotely, consider splitting the session into two (or more).

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Understanding users and staff

When you need to understand the needs and experiences of end users or people in an organisation.

Common activities

- 1-2-1 interviews
- diary studies
- home visits and shadowing

Approaches

Be honest: sessions will sometimes be disrupted, either by the researchers home environment or by the participants. Make it clear up front that it is ok if this happens.

Online scheduling apps: Scheduling apps can help you find availability for participants and send them automated reminder messages.

- Doodle
- Calendly

Recording sessions: On a Mac you can record your desktop and audio via Quicktime. Ensure you store the file inline with our GDPR guidance. Alternatively you can use Lookback.

Home visits and shadowing

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When you want to understand the physical space that someone lives or works in or the way they go about tasks.

Things to consider

Use this approach to gain new perspectives while respecting people's privacy. Using their own technology people can guide you through tasks or scenarios in the environment where they live or work. Provide clear guidance about what you want to observe and learn about. Think about whether this needs to be live moderated research, or alternatively set out instructions so people can share recordings/notes with you (e.g. diary studies).

Approaches

Technology: Confirm details of the technology someone has in advance and provide any support that they might need.

Portability: Laptops can be heavy to carry around and only have a front camera. Recommend to people that you connect via the camera on their phone or a tablet.

Recording: Ask people to record their physical spaces and tasks using video, photography and notes. Use tools that they are likely to already have for this, such as WhatsApp, or FaceTime. You might consider sending prompts throughout the day or week like, "What are you doing right now?" or "When did you snack today?" Think about how you ask people to share/store data inline with GDPR.

Usability testing

When you want to understand the usability of a process, product or service.

Common activities

- guerilla/pop-up testing
- card sorting
- prototype testing
- eye tracking
- accessibility testing

Approaches

Moderated versus unmoderated: Running remote usability testing through tools such as lookback.io offers you a choice of moderated or unmoderated research. Moderated will allow you to get more depth to your insight as you can discuss tasks with the participant. Unmoderated allows you to run tests with many more people, and largely removes the influence of the researcher. If you're going to use an unmoderated approach run one or two moderated sessions first to test comprehension of your tasks.

Heat and touch mapping: Some tools offer heat mapping which indicates where participants cursors have spent the most time. Touch mapping does the same but for fingers on mobile devices. This offers additional insight somewhat similar to eye-tracking.

Gathering feedback

When you need to capture detailed feedback about something.

Common activities

- documents and presentation feedback
- web page feedback
- prototype feedback

Approaches

Collaborative documents and presentations: At FutureGov we use Google Docs, in which you can suggest edits or leave comments. Some clients may be using Microsoft Teams for similar functions.

Web pages: To get feedback on a live webpage you can use COMENT.ME (Google Chrome plugin) or MarkUp (any modern browser) to add inline comments.

Prototypes: Invision, Axure, Adobe XD and Marvel all provide the ability to comment or give feedback on prototypes.

Synthesis and analysis

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When you need to analyse and document findings from research and data.

Common activities

- affinity mapping
- empathy mapping
- personas
- hypothesis generation
- user needs generation

Approaches

Technology: You will need a video conferencing tool and a virtual whiteboard tool, such as Miro or Mural.

Data gathering: Before you begin your session, make sure one person takes responsibility for ensuring all data from relevant research activities is translated onto the virtual whiteboard tool you choose.

Roles: During the session, assign roles to different participants. For example; a timekeeper and facilitator. Have each participant 'own' a different part of the data, such as a user group or stage of a user journey, which they'll be the representative for for every synthesis task.

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Thank you

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